



Washington DC Order Management

Last updated: 12/16/2025

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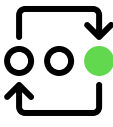
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Sales and Order Management

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

Explore  Learn how you can use the Sales and Order Management applications.	Configure  Plan and configure your Sales and Order Management implementation.	Integrate  Extend capabilities in Sales and Order Management by integrating with other applications.
Use  Use the Sales and Order Management applications as an agent.	[store-future: BEGIN review] Reference  Get details about components such as fields, tables, and properties. [End]	

Exploring Sales and Order Management

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

Overview

The Sales and Order Management applications enable you to manage the product sales life cycle in your organization, including pre-sales opportunities, sales quote generation, order capture, order fulfillment, and post-sales engagement.

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

Sales and Order Management features and applications



Benefits

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

Benefits of SOM applications

Benefits	Key Features	Role
Create and manage product catalogs for commercial and technical product offerings. Commercial catalogs can be used by your agents to create quotes and orders.	Product Catalog Management	Product catalog administrator
Set the pricing for your products through price lists, contextual price controls, and if needed, pricing from external systems.	Pricing Management	Pricing administrator
Create pre-sales opportunities that identify and track potential sales based on customer needs.	Opportunity Management application	Sales agent and account executive
Create and manage sales quotes, which are formal offers for products or services that agents propose to customers.	Quote Management application	Sales agent
Quickly configure and price quotes and complex product offers.	Product configurator	Sales and order agent, admin to set up
Capture and fulfill product and service orders to create a seamless ordering experience for your customers.	Order Management	Order agent, fulfillment agent, agent manager, and fulfillment manager

Benefits of SOM applications (continued)

Benefits	Key Features	Role
Create and manage contracts and entitlements as part of post-sales support.	Post Sales Support	Agent
Support change management and commercial workflows (move, add, change, and disconnect) of sold products.	Customer Life Cycle Management Workflows	Agent

Request apps on the Store

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

Product Catalog Management

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

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

Note:

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

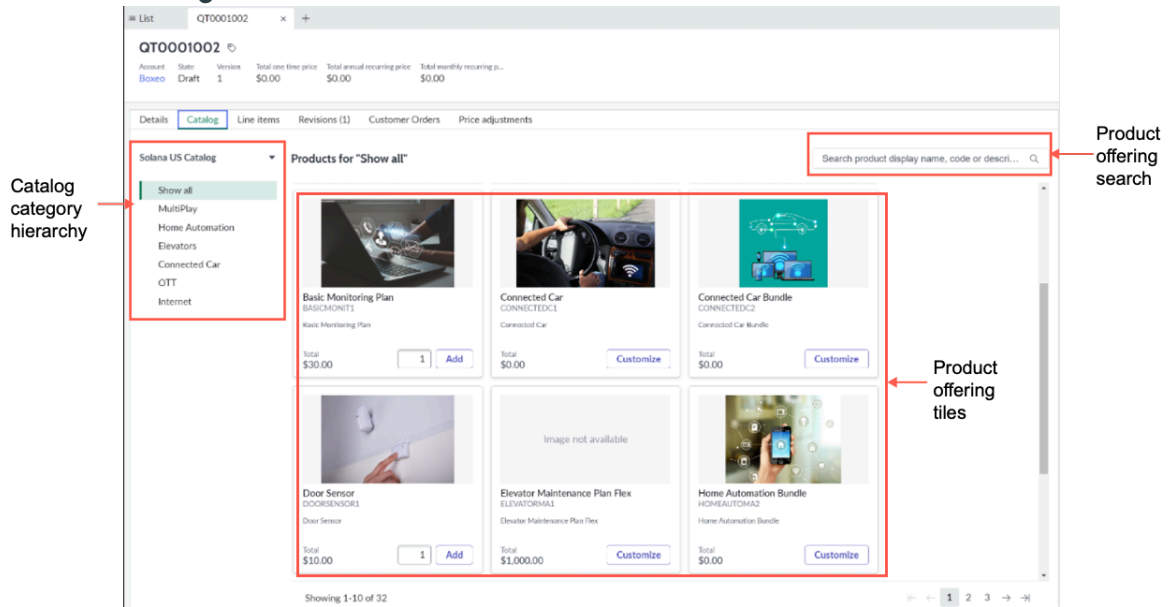
- **Product catalog user interface:** Launch from anywhere in opportunity, quote, and order capture workflows, enabling agents and customers to navigate and search product offers.
- **Catalog category hierarchy:** Use of hierarchical structures of catalogs and categories to organize products and services logically.
- **Product catalog browse and search:** Allow agents to find products quickly with a full catalog search function.
- **Version control:** Track changes made to product information over time, helping with transparency and auditability.

Product catalog management UI

Product offering catalog UI has the following features:

- Browse and search product offerings using keywords, descriptions, and industry codes.
- Shows the catalog category hierarchy that is used to organize product offers and helps agent to navigate through the hierarchy and find the product offers

Product catalog user interface

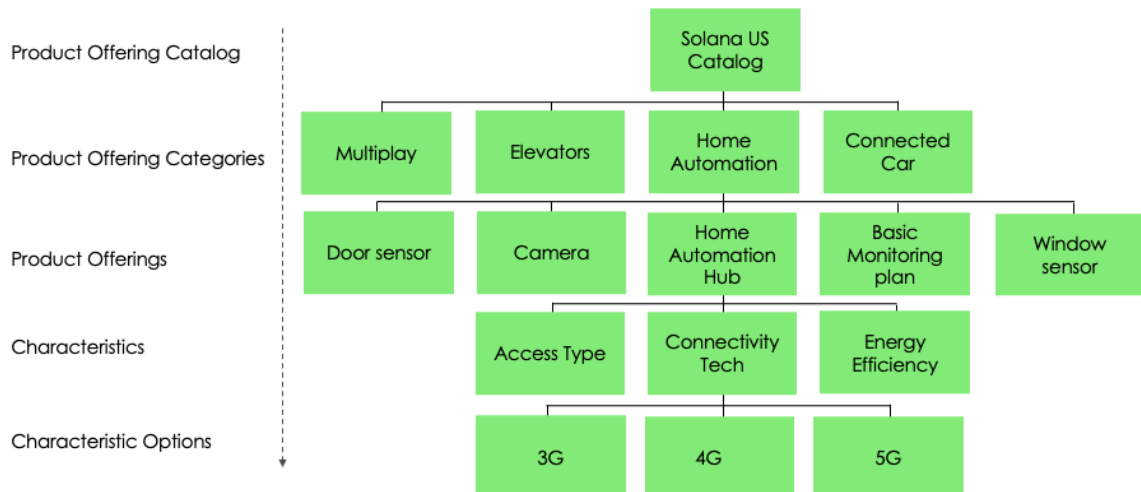


Product offering catalogs and categories

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

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

Examples of catalogs, categories, and product offerings



To learn more, see [Product configurator](#).

Pricing Management

The Pricing Management application is the foundation of any Sales and Order Management solution, enabling your organization to set, manage, and optimize pricing strategies that

maximize profitability while meeting customer expectations. These pricing strategies empower your sales team by giving them the flexibility to generate quotes and orders with accurate and competitive pricing quickly.

Pricing Management provides various features to implement pricing in your organization.

Note:

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

Price lists

Price lists define the prices for products and services offered by your organization. Your agents use price lists to find product pricing quickly when creating quotes and capturing orders. Your pricing administrator or manager creates price lists and adds price list lines that define the list price for each of your product offerings.

Support for multiple price lists

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

Example of account-based price list

The top screenshot shows the 'Price List - Funco Intl Price List' form. The 'Account' field is highlighted with a red box and contains the value 'Funco Intl'. The 'Description' field contains the text 'Discounted pricing negotiated with Funco Intl'.

The bottom screenshot shows a quote form with a 'Pricing' section. The 'Price list' field is highlighted with a red box and contains the value 'Funco Intl Price List'. The 'Pricing' section displays the following information:

Field	Value
Currency	USD
Total one time price	USD (\$) 30.00
Total monthly recurring price	USD (\$) 0.00
Total annual recurring price	USD (\$) 0.00

Pricing methods

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

For details on configuring price lists and price list lines, see [Create and publish a price list](#) and [Create a price list line](#).

Cost books

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

Example of cost book in quote details and margins in quote line

The image displays two screenshots from the ServiceNow interface. The left screenshot shows the 'Pricing' section of a quote line item (QT0001001) with a red box highlighting the 'Cost book' field set to 'Standard Cost Book'. The right screenshot shows the 'Quote Line Item' details for QT0001003 with a red box highlighting the 'Unit cost' field set to 'USD (\$) 125.00'.

You create a cost book line to set the unit cost for each product offering. For details on configuring cost books and cost book lines, see [Create and publish a cost book](#) and [Create a cost book line](#). For information on activating the cost book and cost margin features in Quote Management, see [Install and configure Quote Management](#).

Price adjustments

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

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

Pricing matrices

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

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

Pricing extensions

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

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

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

Product configurator

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



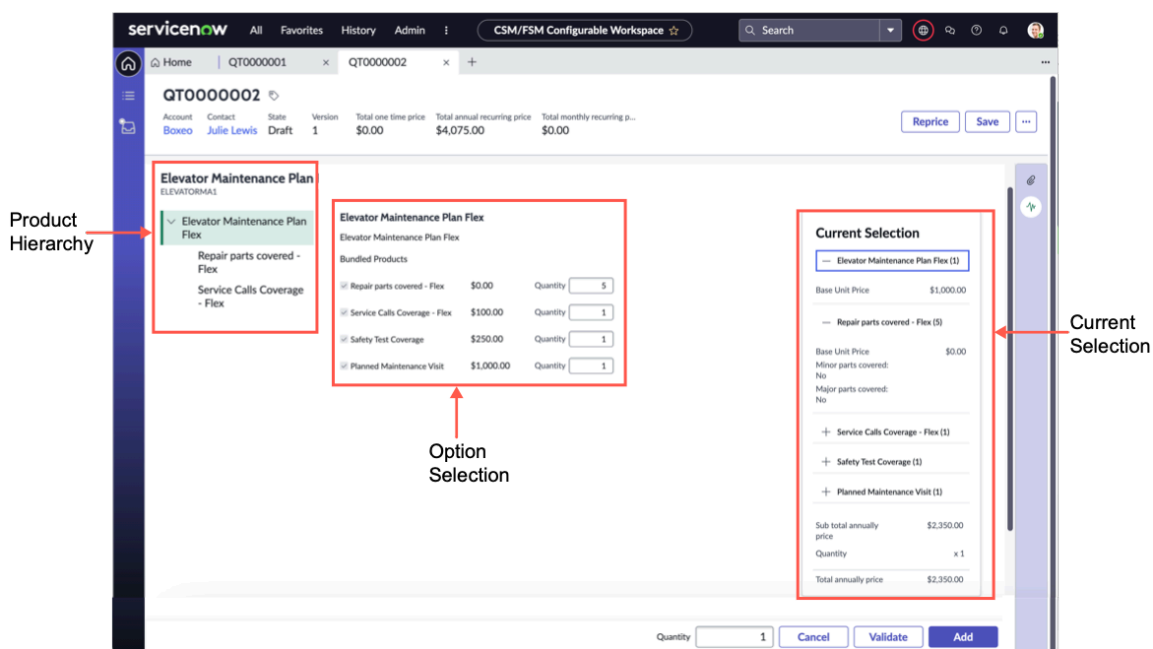
Note:

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

The interface consists of three main sections:

- **Product hierarchy:** Lists the parent and child product relationships for configurable products. Product hierarchies are configured using relationships and relationship groups. These hierarchies help agents navigate the product at different nodes or levels within a nested bundle. To learn more about configuring this section of the product configurator, see [Create product offering relationships](#).
- **Option selection:** Displays the product options or product characteristic options that can be selected. Characteristics and characteristic options are configured as you build your product offerings and appear in the product configurator. For more information, see [Create product characteristics and characteristic options](#).
- **Current selection:** Shows the pricing for the options that you select, which are calculated automatically and displayed. Pricing for selected options is shown and grouped as bundles as applicable. Also shown are the subtotals and total based on the recurring and one-time pricing methods. See [Configuring product pricing](#) for more information.

Product configurator interface



Open state management

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

As developers, you can use [extension points for open state management](#) to set the view-only or editable states on any configurator node, based on events that occur at loading or when product selections change. Various helper API methods are available for reading and setting states on any node, eliminating the need for extensive JSON scripting.

Note:

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

Use cases for configuration state management

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

Configuration state model use case examples

Product configurator use case	Example
Hide certain options for a customer	A product attribute selection isn't displayed for customers in California due to state safety regulations.
Set certain default options for a customer	For upgrades, only the Ultimate plan is displayed for existing customers who have a premium plan.
Allow only certain options to be selected based on other attribute options	For certain products such as laptops, display all sizes 13", 15", and 17", but display only 15" and 17" laptops if only the touchscreen feature is required.

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

Framework overview

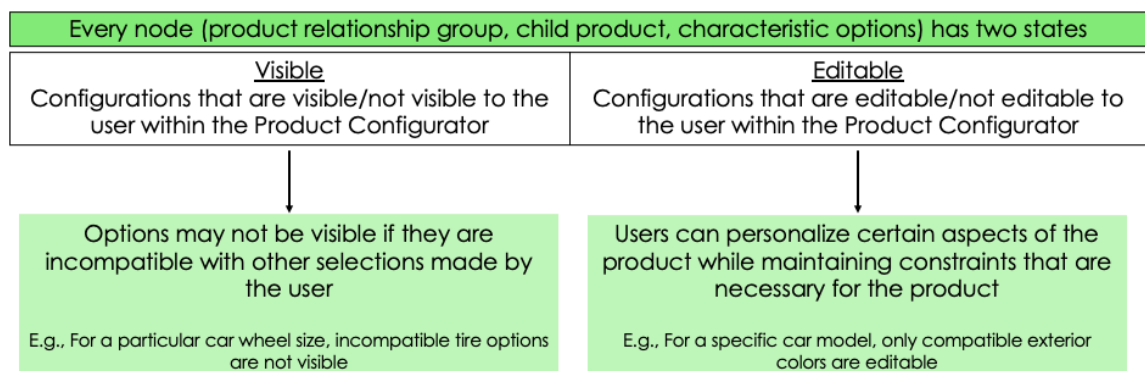
Manage the following states using the Configuration State Model API Framework:

- Visible - Yes (make node visible) or No (make node invisible).
- Editable - Yes (show node and make it selectable) or No (show node but make it unselectable).

These states can be activated using these two events in the Events Framework of the Configuration State Model:

- On Load - The state (visibility, editability) of each node is initially set to Yes (true). The open state is invoked on loading.
- On Change - This function is called whenever there's a change in a node's value in the product configurator user interface. However, this state isn't invoked when quantity changes occur in the product configurator.

State management key concepts



Helper API methods

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

Apply states

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

Getter methods

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

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

Setter methods

Set the visible and editable states for product relationship groups, product characteristics, and product characteristic options.

- `setVisible`: True/False at all levels
- `setVisible(nodePath, True/False)`
- `setEditable`: True/False at all levels
- `setEditable(nodePath, True)`

Getter context variable methods

Retrieve context variables inside the product configurator user interface.

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

Opportunity Management

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

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

Opportunity workflow in Sales and Order Management



Opportunity Management interface

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

Opportunity Management tabs

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

Integrating pricing in Opportunity Management

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

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

Pricing in Opportunity Management provides the following benefits:

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

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

What to do next

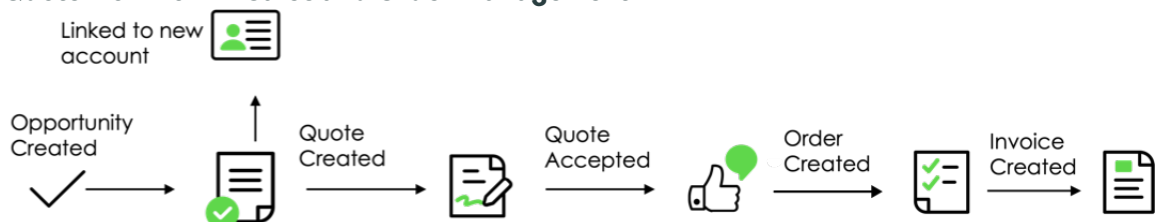
To learn about setting up Opportunity Management, see [Install and configure Opportunity Management](#).

Quote Management

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

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

Quote workflow in Sales and Order Management



Quote Management interface

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

Quote Management tabs

Tab	Description
Details tab	Add basic information for the quote.
Catalog tab	Search for and add products to your quote using the product configurator. Pricing is also managed through the product offering catalogs.
Line Items tab	Add different line items to a quote. In each quote line item, you can update product characteristics and add pricing adjustments.

Quote Management tabs (continued)

Tab	Description
Revisions tab	Create multiple versions of a quote.
Customer Orders tab	Turn your quote into a customer order.
Pricing Adjustment tab	View and update pricing adjustments.

Quote Management Details tab

The screenshot displays the ServiceNow Quote Management Details tab for quote QT0000002. The interface includes a top navigation bar with 'All', 'Favorites', and 'History' tabs. The main form is divided into several sections: 'Details' (Number: QT0000002, Version: 1, State: Draft, Account: (Empty), Contact: (Empty), Created by: admin, Quote date: 2023-12-18 15:56:14, Expiration date: YYYY-MM-DD HH:mm:ss, Short description: B2B - Elevator Platinum Maintenance Plan), 'Catalog' (5 items), 'Line items' (5 items), 'Revisions' (1 revision), 'Customer Orders' (0 orders), and 'Price adjustments' (4 adjustments). The pricing summary shows a total one-time price of \$0.00, a total annual recurring price of \$4,075.00, and a total monthly recurring price of \$0.00. The right sidebar contains a 'Compose' section for work notes and an 'Activity' section showing recent changes by the System Administrator.

Quote Management integration with product offering catalogs

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

Product configurator

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

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

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

Building a quote with the product configurator

The screenshot displays the ServiceNow Product Configurator interface. At the top, there's a navigation bar with tabs for 'List', 'QT0000002', 'QT0000001', and '+'. Below this, a summary table shows quote details:

Account	Contact	State	Version	Total one time price	Total annual recurring price	Total monthly recurring p...
QT0000002			Draft 1	\$0.00	\$4,075.00	\$0.00

On the right, 'Reprice' and 'Save' buttons are visible. The main area is titled 'Elevator Maintenance Plan Flex' with a 'Back' button. It shows a list of bundled products with checkboxes and quantities:

Bundled Products	Quantity
☒ Repair parts covered - Flex	1
☒ Service Calls Coverage - Flex	2
☒ Safety Test Coverage	1
☒ Planned Maintenance Visit	5

A 'Current Selection' panel on the right details the pricing for each selected item:

- Elevator Maintenance Plan Flex (1)**: Base Unit Price \$1,000.00
- Repair parts covered - Flex (1)**: Base Unit Price \$0.00
- Service Calls Coverage - Flex (2)**: Base Unit Price \$100.00, Coverage Hours: 8x5
- Safety Test Coverage (1)**: Base Unit Price \$250.00, Coverage Included: Yes
- Planned Maintenance Visit (5)**: Base Unit Price \$1,000.00, Visit Recurrence: Quarterly

Summary totals at the bottom right:

Sub total annually price	\$6,450.00
Quantity	x1
Total annually price	\$6,450.00

At the bottom, there are 'Quantity' (set to 1), 'Cancel', 'Validate', and 'Add' buttons.

Configure and create quote line items

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

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

Add pricing adjustments to quotes

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

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

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

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

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

Integrating cost books in Quote Management

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

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

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

What to do next

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

Sales Agreement Management

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

Sales Agreement Management can be a separate application or part of the Sales and Order Management application.

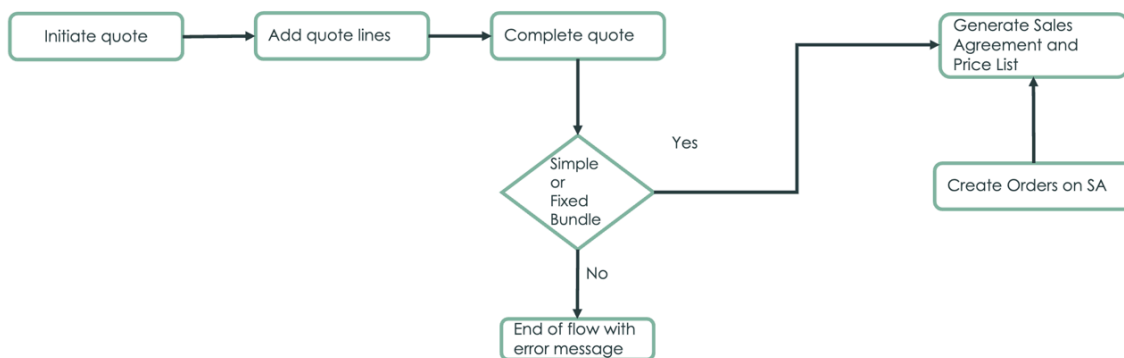
A quote is a formal offer for products and services, proposed at specific prices and related payment terms, which is sent to a prospective customer. Only after a quote is completed or closed, a sales agreement can be generated.

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

Sales agreement workflow: Quote-to-sales agreement

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

Sales Agreement Workflow



Sales agreement line items

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

Sales agreement price list

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

Order Management

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

Request apps on the Store

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

Overview

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

Benefits

- Catalog-driven, cloud-based order fulfillment with a unified technical and base product catalog.
- Decomposition and orchestration workflows that are easy to configure and modify according to your business needs.

- Integrated order fulfillment and service assurance process on a single cloud-native platform.
- If you're using the Order Management for Telecommunications, Media, and Technology application, the TM Forum-based data model provides interoperability with any external Configure Price Quote (CPQ) application, and other systems.

Features

Order capture and enrichment

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

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

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

Order decomposition

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

Order fulfillment

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

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

[store-future: BEGIN review]

Product Catalog data model and versioning

The Product Catalog data model provides a framework that enables you to define the products, services, and resources that you want to sell to your customers.

Product Catalog specification entities

The Product Catalog data model has different specification entities that separate the customer-facing and non-customer-facing information from the technical and market information:

Product specification

Customer-facing product information.

Service specification

Both customer-facing and non-customer-facing service information.

Resource specification

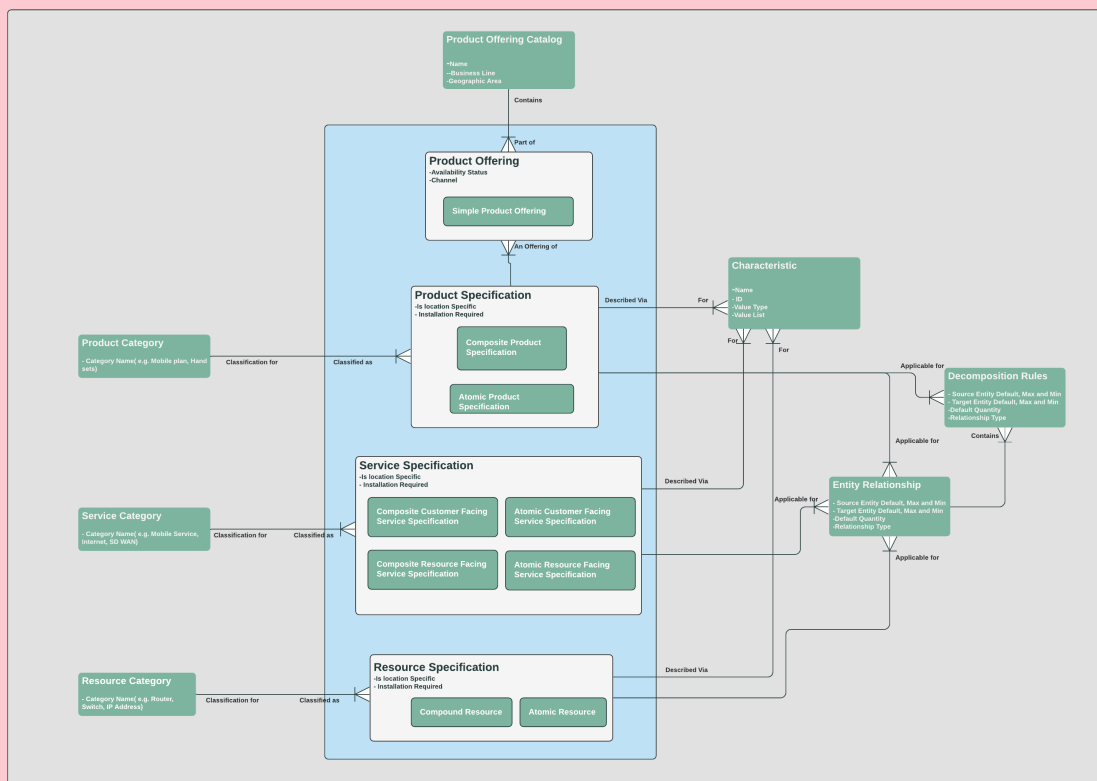
Non-customer-facing technical resource information.

The Product Catalog data model is aligned with the TM Forum Shared Information/Data (SID) data model, which is an industry-standard data model for the telecommunications industry.

Product Catalog tables and their relationships

The following diagram shows the tables and the relationships that make up the Product Catalog data model.

Product Catalog data model



The Product Catalog data model uses a combination of tables to store data:

- Tables that are included with the Order Management product.
- Tables that are from the IT Asset Management application.
- ServiceNow AI Platform tables.

Product Catalog data model entities

The following entities are central to the Product Catalog data model.

Entity	Description
Characteristic	Options that are available for a product. The characteristics are generic. You can associate them to one or more product, service, or resource specifications to describe the product, service, or resource attributes. The characteristics can have one or more characteristic options. To learn more, see Create the characteristics and characteristic options for your product offerings.
Specification category	Product, service, and resource specifications that are associated to a model category for reporting and workflow generation purposes. The specification is also associated to a model category, which determines if the ServiceNow AI Platform creates an asset from a configuration item (CI), and to what asset class it belongs. To learn more, see Create and associate specification categories with model categories.
Product specification	Product that a provider sells to the customer. This specification is a template to capture various characteristics. Examples are a product including the brand, cost, terms and conditions, and product-related materials, such as product visuals. To learn more, see Create and publish product specifications.
Service specification	Technical information, which is in a template that defines the various aspects of a service. - A service specification includes cost, terms and conditions, and service-related materials such as service visuals and implementation guides. - You can use these specifications to define customer-facing services (CFS) and resource-facing services (RFS). To learn more, see Create and publish service specifications.

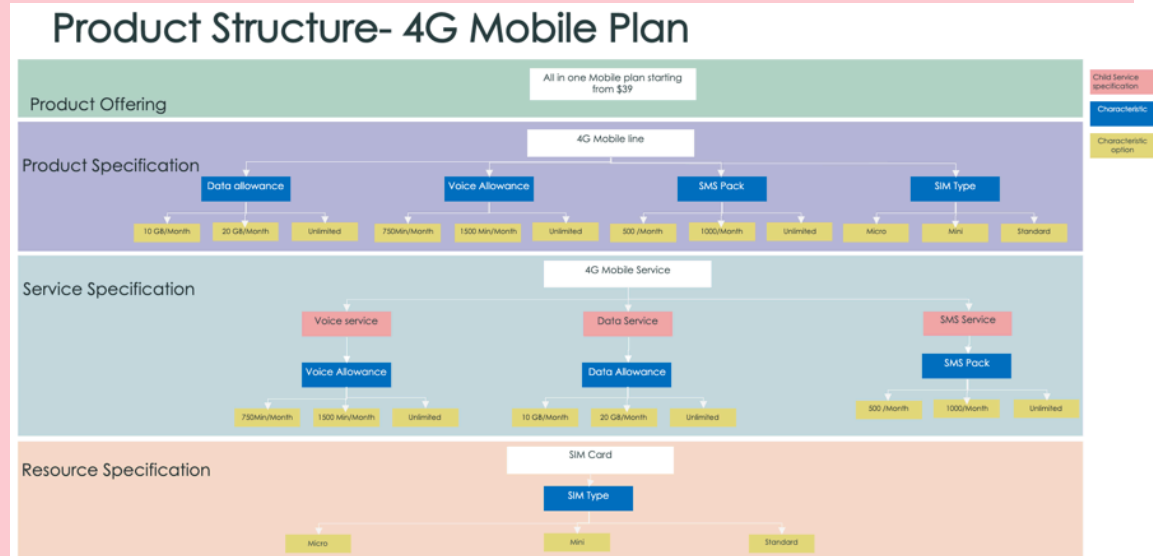
Entity	Description
Resource specification	Technical information, which is in a template that defines the aspects of a resource. A resource specification includes the manufacture, model, and brand-related information about a resource, such as resource visuals and activation guides. To learn more, see Create and publish resource specifications.
Specification relationship	Relationships between the product, service, and resource specifications and how a product offering is decomposed, fulfilled, and delivered after a customer order is received. To learn more, see Create specification relationships and decomposition rules.
Decomposition rule	Decomposition rules that are created at specification relationship levels that determine how a product decomposes into associated services.
Product offering	How a provider wants to sell a product. A product offering contains customer-facing information, such as the product description, pricing, eligibility, and product characteristic options. A product offering is always associated with a product specification. A single product specification can be used to define unique product offerings for different market segments with different pricing. To learn more, see Create your product offerings and publish to a catalog.
Product offering catalog	Similar groups of product offerings that are targeted for a market or customer segment. To learn more, see Create a product catalog.

Each product offering has a product specification, which has characteristics that are associated with it. Specification relationships define the relationship between the product service, resource specifications, and how a customer order of a product offering is delivered. Service and resource specifications also have characteristics that are associated with them.

The following diagram shows how the entities work together to structure a product offering for a 4G mobile plan:

1. In the diagram, the All in One Mobile plan is defined as a product offering that uses 4G Mobile line product specifications. These specifications contain the required characteristics and associated characteristic options.
2. The 4G Mobile line product specification is associated with the 4G Mobile Service service specification, which is a composite service specification. It contains three other service specifications: voice service, data service, and SMS service.
3. The SIM card uses a resource specification that is required to activate the mobile services.

4G mobile plan



[End]

[store-future: BEGIN review]

Catalog versioning

By creating and publishing your versioned specifications and product offerings in a product catalog, your customers can order up-to-date versions of the products or services that they require. Your product catalog manager can create versions of the published specifications and product offerings with the required enhancements to support your customer's business, marketing, manufacturing, or operational changes.

Overview

As a service provider, you define the products, services, and resources in your product catalogs so that your customers can decide what to purchase from you. Examples of some items in a product catalog might include cell phones, routers, calling plans, and services that you offer. You can offer some of these items in packaged bundles to your users.

Your catalog items continue to evolve over time to accommodate the changes that are related to how your items are sold, configured, and delivered to your customers. Typically, these changes are related to engineering improvements that make your products, services, and resources more marketable and appealing to your customers. The changes usually are to the fit, form, and function, characteristics, characteristic options, and specification relationships of your catalog items. For example, an internet router may evolve over multiple revisions to support changes that are related to pricing and internet speeds.

As a product catalog manager, you create new specification and product offering versions for your products. Proper versioning enables your customer service agents to know what the latest versions of your product and service offerings are when they sell more expensive, complementary, upgraded, or related products to your customers.

Benefits of catalog versioning

You can use the catalog versioning functions to do the following actions:

- Create specification and product offering versions for your products.
- Track the changes and revisions to your products, services, and resources as different versions.
- Revise and publish catalog offerings that support multiple versions of specifications and product offerings.
- Use the latest versions of specifications and product offerings that are published in your product catalogs during order capture, decomposition, and fulfillment.
- Reference the specification and product offering versions in an inventory.

[End]

[store-future: BEGIN review]

Enhanced product catalog experience with the CSM Configurable Workspace

View information related to all catalog items and work items on a single page.

The enhanced product catalog landing page is built on the CSM/FSM Configurable Workspace. Users with the following roles can view this landing pages:

- sn_prd_pm.product_catalog_admin
- sn_prd_pm.product_catalog_manager
- sn_prd_pm.product_catalog_viewer

For more information on these user roles, see [Assigning order fulfillment and provider roles](#).

Product catalog admins, managers, or viewers navigate to the **CSM/FSM Configurable Workspace** to view the product catalog landing page.

With the enhanced experience, product catalog managers can create and manage entities quickly and easily, without navigating through several pages and related items of a product offering. Additionally, they don't need to track related entities while navigating to understand the product hierarchy. They can view the complete product hierarchy with all the related entities on a single page. The enhancements include:

- Landing page with widgets based on the user persona.
- Lists and forms available in the configurable workspace.
- Complete hierarchy of a:
 - Product offering
 - Product specification
 - Service specification
 - Resource specification

[End]

[store-future: BEGIN review]

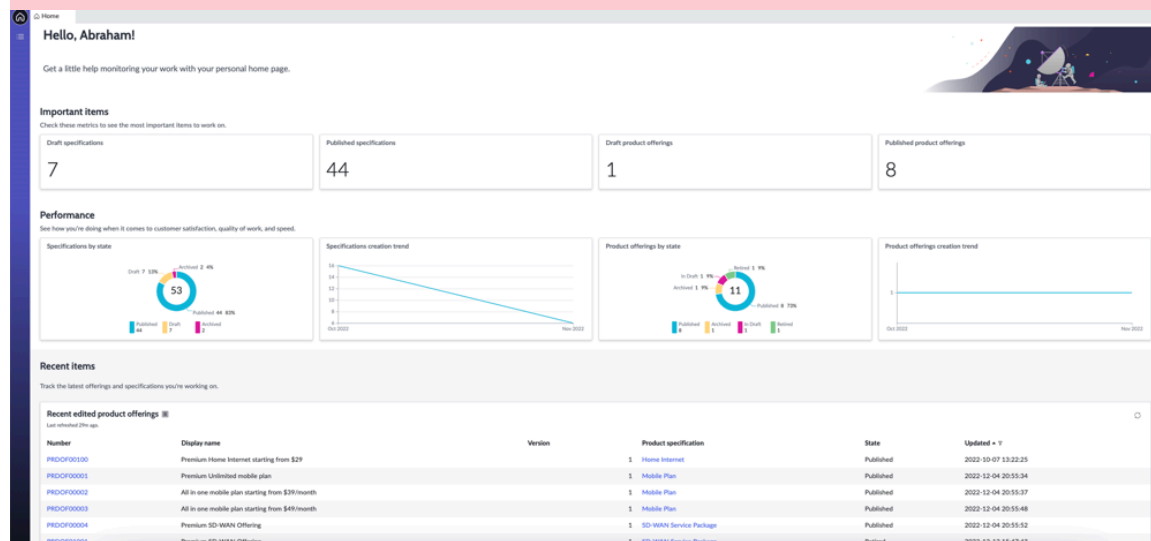
Product catalog landing page

The product catalog landing page provides a high-level overview of all your product catalog-related information.

You can get a consolidated view of all your product offerings, specifications, their status, and the performance. You can customize the landing page according to your requirements. The grid-based layout makes it easy to add, remove, or group available components. To modify the landing page, follow these steps:

1. Navigate to **All > UI Builder** and select **CSM/FSM Configurable Workspace**.
2. Select **Product Catalog Landing Page**.
3. You can modify the page in one of the following ways:
 - a. Create a copy of the existing page. Modify the duplicate copy according to your needs and replace the existing page.
 - b. Directly modify the existing page. In this case, any enhancements made to this page may be lost during an upgrade and any new features won't be available.

For more information, see [UI Builder](#).



Important Items

This section provides an overview of the important items that must be addressed. You can view the number of draft and published product offerings and specifications and drill down to the associated pages for more details.

Performance

This section shows a graphical representation of:

- **Specifications by state:** Shows a breakdown of the distribution of the specifications based on their state (published, draft, retired, or archived). Click on the pie chart to drill down to the specific status page.
- **Product offerings by state:** Shows a breakdown of the distribution of the product offerings based on their state (published, draft, retired, or archived). Select the pie chart to drill down to the specific status page.
- **Product offerings and specifications creation trend:** Shows the number of product offerings and specifications created during a specific period of time.

Recent items

This section helps you track the product offerings and specifications that you recently edited. Select a Number or Category link to drill down to the Details page.

[End]

[store-future: BEGIN review]

Manage product catalog entities from the CSM Configurable Workspace

Create and publish product offerings to a product catalog from the CSM Configurable Workspace to define how you sell your telecommunications products to your customers.

Before you begin

Role required: sn_prd_pm.product_catalog_admin, sn_prd_pm.product_catalog_manager

Procedure

1. Navigate to **Workspace > CSM/FSM Configurable Workspace**.
2. Click the **List** menu to view the list of catalog entities that have been defined.
3. For each type of catalog entity, you can do the following:
 - Click **New** to create a new entity.
 - Click on an entity in the Draft stage to navigate to the Details page. On the Details page, you can **Save**, **Publish**, or create a **Copy**.
 - Select an entity that is in a Published state and click **Retire** or **Archive**.

See [Setting up versioned specifications and product offerings for Order Management](#) for more details on these tasks.

[End]

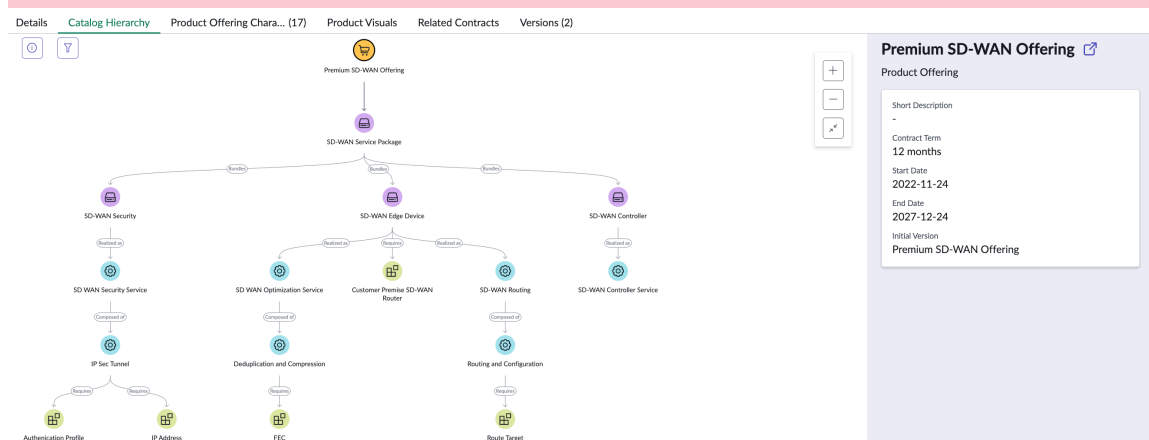
[store-future: BEGIN review]

Product catalog hierarchy

View the complete hierarchy of a specification (product, service, resource, or product offering) and ensure that all entities have been defined and associated correctly.

The hierarchical view provides a high level view of how the product offering or product specification has been defined, the services which enable that product to be realized, and resources which are required to deliver those services. This helps product catalog managers to easily understand and validate the product and ensure that the supporting services and resources are designed as required to efficiently deliver new products. The hierarchy also highlights the relationship between two specifications.

To view the product catalog hierarchy, navigate to the Product Offering Details page and click the Catalog Hierarchy tab.



This diagram shows every level of the product hierarchy:

- Product offering
- Product specification
- Service specification
- Resource specification
- Specification relationship between two entities

On this page, you can:

- Click on an item in the hierarchy. The selected item is highlighted and details are displayed on the side panel. Click on the Open Record icon to drill down to the Details page.
- Click the Legend icon to view the type of items or nodes available in the hierarchy.
- Select a product specification or product offering to display its related entities while hiding the other entities.

[End]

Order Management data model

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

Order life cycle

The Order Management data model enables a customer order to move through the various stages of an order's life cycle.

Order life cycle

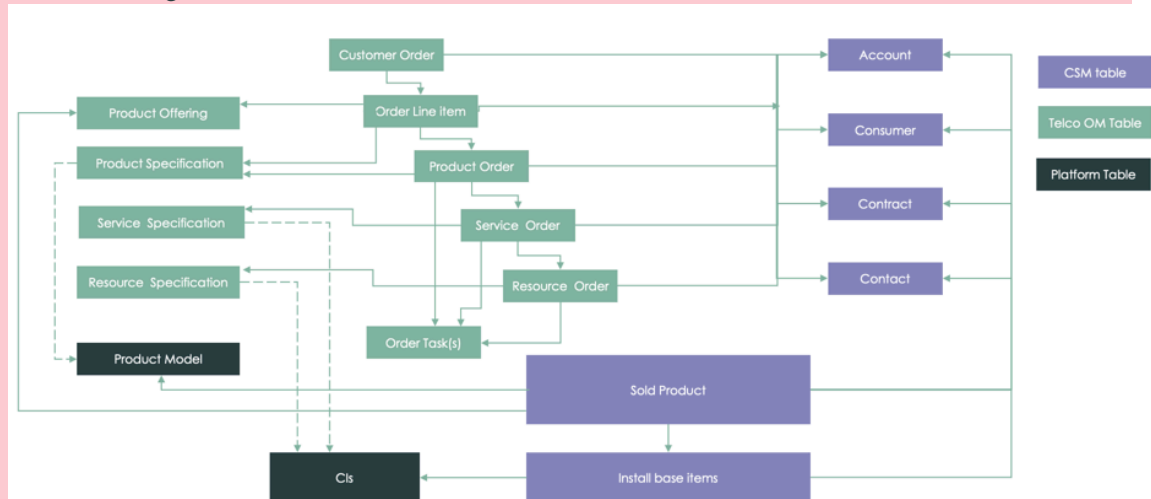
Stage	Description
Customer order	Main order entity that is captured and created for managing the end-to-end life cycle of a customer request for products or services.
Enrichment	Additional information that is required for the order decomposition and for the fulfillment process. Attributes and elements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

[store-future: BEGIN review]

Order Management tables, entities, and their relationships

[store-future: BEGIN review]The following diagram shows the tables and the relationships that make up the Order Management data model.

Order Management



[End]

The Order Management data model uses a combination of tables to store data:

- Tables that are included with the Order Management product.
- Tables that are from the Customer Service Management application.
- ServiceNow AI Platform[®] tables.

Order Management data model entities

Entity	Description
Customer order	Main order entity that is captured from an external customer order system, or manually entered directly into the ServiceNow AI Platform that manages the end-to-end life cycle of requests for products or services.
Customer order line item	Each individual product that is within a customer order. Each order line item contains a product order, which can then be decomposed into domain product, service, or resource orders.
Service order	Service order captured from an external customer order system or manually entered directly into the ServiceNow AI Platform. Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates.
Service order line item	Each individual service that is within a service order. Each order line item contains a service, which can then be decomposed into domain service and resource orders.
Domain order	Orders that are created during the order decomposition process, typically in three

Order Management data model entities (continued)

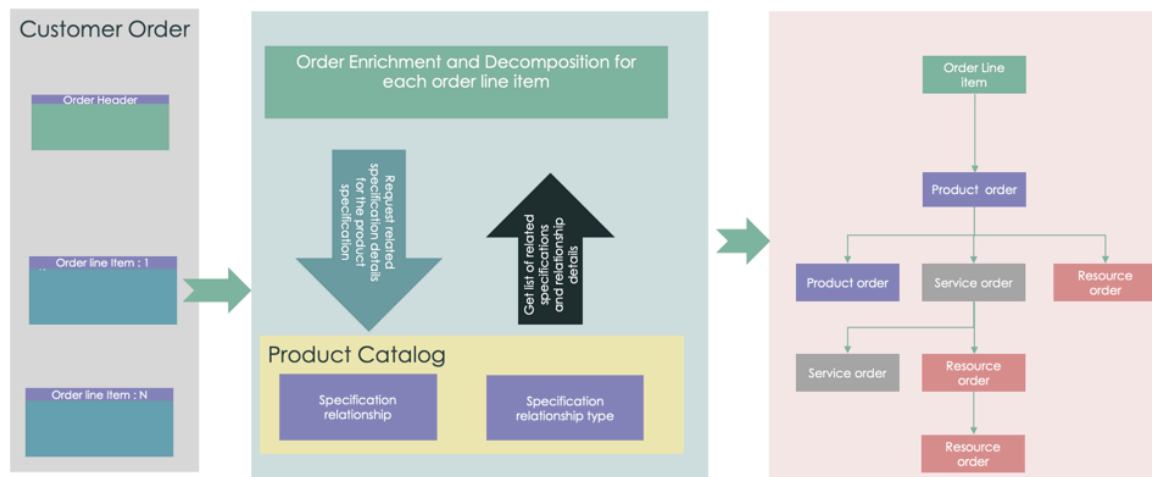
Entity	Description
	different domain types, called product, service, and resource. Domain product order Type of domain order that was created for managing the fulfillment process for a product that a customer orders. Domain service order Type of domain order that was created for managing the fulfillment process for a product that a customer orders. Domain resource order Type of domain order that was created for managing the resources that are required for the fulfillment of the product that the customer ordered.
Order Tasks	Tasks for completing the product, service, and resource orders according to the fulfillment flow. These order tasks also apply to service orders.

[End]

Order enrichment and decomposition process

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

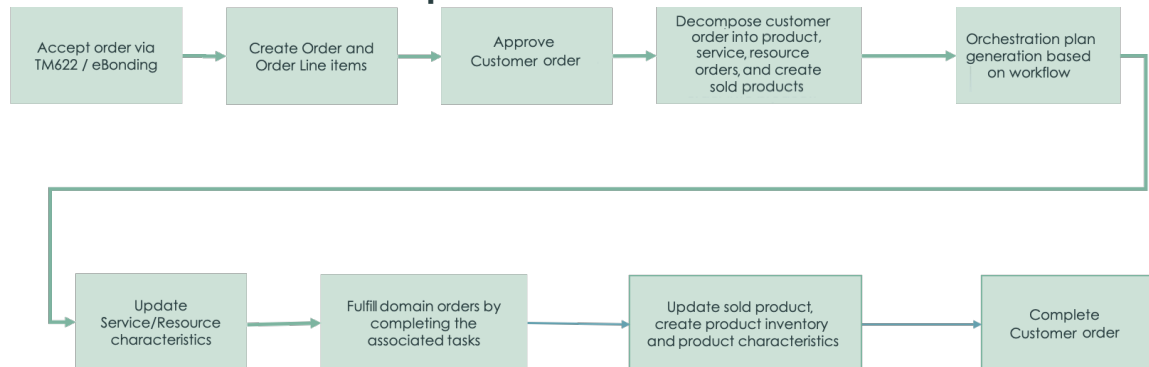
Order enrichment and decomposition process



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

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

Order fulfillment workflow example



Action types for customer and service orders

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

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

Order action types

Order action type	Description
Add	Add a customer order that isn't associated with an existing order from the same customer. This customer order results in new order management and fulfillment activities. For example, you place a new order for a home internet service.
Change	Change an existing order, which changes a previously ordered or fulfilled product or service. This order action type includes the following scenarios: • Addition of a child product specification that the customer didn't previously order. • Deletion of an optional child product specification that the customer already has. For example, you upgrade the download speed of your home internet from 100 Mbps to 1000 Mbps. • Change characteristics for an existing product.
Disconnect (delete for TMF API)	Disconnect an existing customer order line item or product order. For example, you cancel your home internet service.

Order action types (continued)

Order action type	Description
	Note: When a mandatory product is deleted, all the products are deleted.
Suspend	Product or service order that temporarily inactivates the product inventory of its order line items. Note: To learn more, see Using suspend and resume actions .
Resume	Product or service order to activate the product inventory of its order line items that were previously suspended. Note: To learn more, see Using suspend and resume actions .
No change	Order line items with No change action are included in the order for informational purpose only. For example, an order contains multiple items, but only one of those items must be changed (like speed has changed from 100 Mbps to 1000 Mbps), which affects the parent line item. However, all the other line items in the order remain unchanged.

Using suspend and resume actions

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

Overview

As a Communications Service Provider (CSP), you can temporarily suspend or inactivate your product and service inventories. The suspend and resume requests are managed as orders with the changes in the inventory of the product and service orders during the order decomposition and fulfillment process. An order suspension and resume action can occur immediately or at a future date.

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

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

How the Suspend and Resume actions work

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

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

Additional validations and scenarios

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

Note:

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

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

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

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

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

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

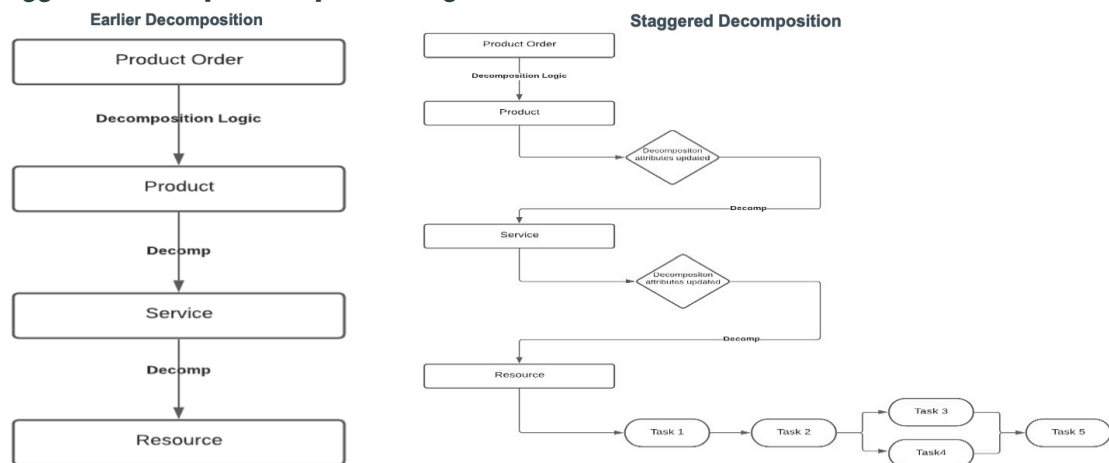
In the order creation process for the suspend or resume action, you can use the external inventory ID in the payload instead of the system-generated ID for the inventory.

Staggered decomposition

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

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

Staggered decomposition processing



Contrast to earlier decomposition processing

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

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

How staggered decomposition works

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

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

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

Order quantity support

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

Overview

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

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

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

Support for the catalog-driven characteristic quantity

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

Support for the characteristic based quantity

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

- Specification relationship with quantity characteristic
- Characteristic mapping

Order capture process in Order Management for Telecommunications, Media, and Technology

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

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

Scenario 1: Using APIs for order capture and upload

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

Note:

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

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

API-based workflow scenario for Order Management for Telecommunications, Media, and Technology



TMF622 API order capture workflow scenario

Scenario 2: Using Service Exchange for order capture and upload

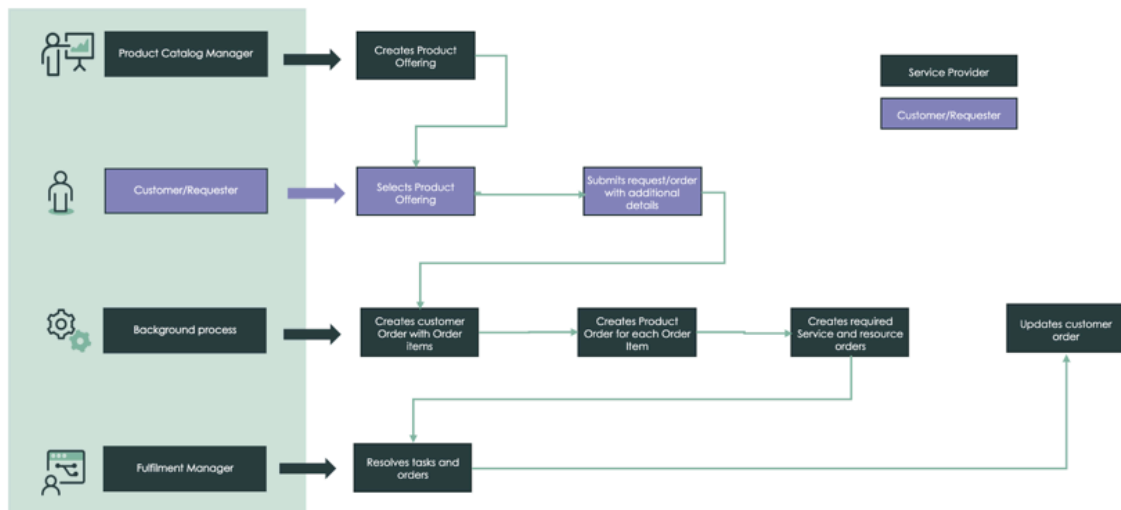
Your ServiceNow instances can be integrated with the instances of your customers by using Service Exchange. With this integration, you can create and publish product offerings to your customer's instances. Enterprise customers can then submit requests for products or services, which you can then fulfill.

Note:

Although the Service Exchange legacy application is still supported, see [Learn about Service Exchange](#) for detailed benefits on using the current Service Exchange application.

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

Service Bridge workflow scenario for Order Management for Telecommunications, Media, and Technology



[store-future: BEGIN review]

Enriching an order in Order Management

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

Overview

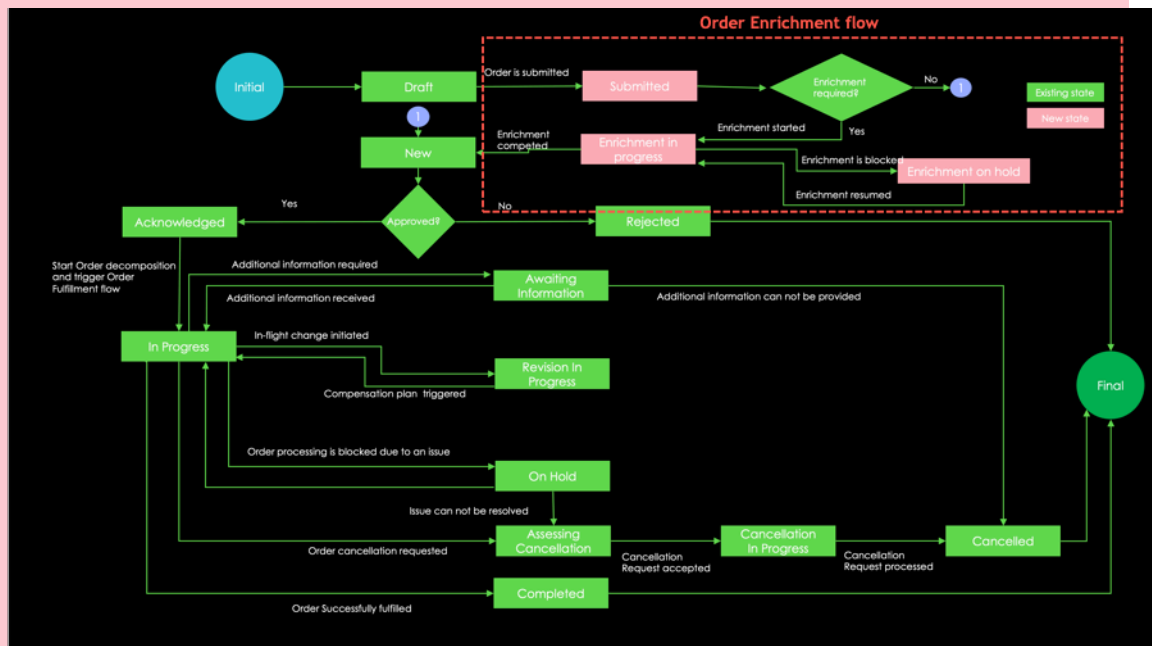
An order enrichment process is a set of tasks to capture additional order details by the order agent from your customer.

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

How the order enrichment process works

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

Order Enrichment flow



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

Decision table for Order enrichment process

Order Enrichment Flow Policy

Test

Save

Inputs

ⓘ Add

Label

Type

Reference

Mandatory

Order line item

Reference

Order Line Item [sn_ind_tmt_orm_order_line_item]

Add condition column

:

ⓘ Add an input

Decision table

ⓘ Expert

ⓘ Import

ⓘ History

Conditions

Results

	Category Order line item (Order Line Item » Specification » Category)	Offering Order line item (Order Line Item » Product offering)	Flow Flow [sys_hub_flow]
1	SD-WAN Service Package	Premium SD-WAN Offering v3	SD-WAN Service Package Enrichment
2	Managed Firewall		Managed Firewall Service Enrichment
Default result ⓘ			
ⓘ Add new decision row			

Showing 1-2 of 2

Show more

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

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

The order agent can now approve or reject the order.

[End]

Managing service orders

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

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

Fallout Management data model

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

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

Order fallout table attributes

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

Order fallout table attributes (continued)

Field	Description
	Fallout record that is on hold and waiting for more information before processing can proceed. Resolved Fallout issue that has a resolution but you have not formally closed it. Closed Completed Fallout record that is complete and closed. Canceled Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place.
Originated from	Identifier of the originating order task record that the fallout record is associated with.
Activity	Listing of the processing activities and changes in the field values that have taken place for the fallout record. To expand, collapse, or filter by activity stream: - Click the activity stream filter icon (🔍) to filter by additional comments, attachments, or state. - Click the more options icon (...), and then select the appropriate one: 
Attachments	File attachments for the fallout record. Click Browse to add the file as an attachment.

Related topics

[Managing order fallout](#)[Create automated and manual fallout records](#)[Flow Designer](#) [Flows](#) [Create a flow](#) 

Inflight change order management in Order Management

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

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

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

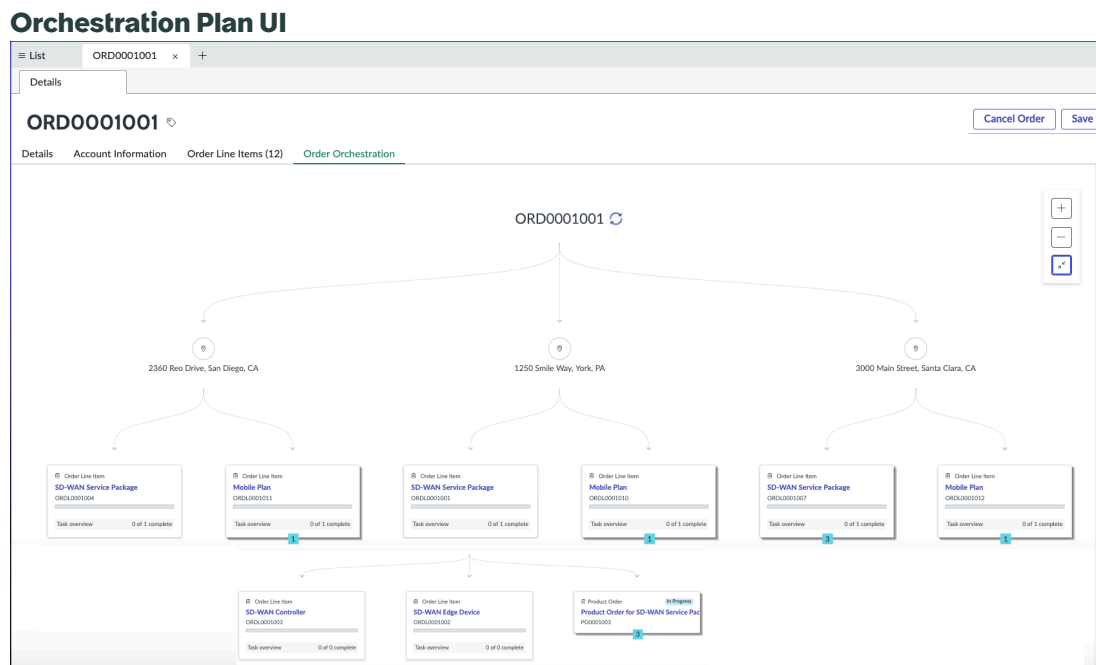
Orchestration plans for order fulfillment

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

Using the Orchestration Plan UI

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

The following example shows the Orchestration Plan UI:



Use the Orchestration Plan UI to see:

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

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

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

Fulfilling multi-site orders

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

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

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

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

Note:

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

- [Order Management data model](#)
- [Customer order decomposition after fulfillment approval](#)

Related topics

[Reviewing orchestration plans and fulfilling orders](#)

[Review an order orchestration plan](#)

[Managing order fallout](#)

[Review and update the customer order fulfillment tasks](#)

Jeopardy Management

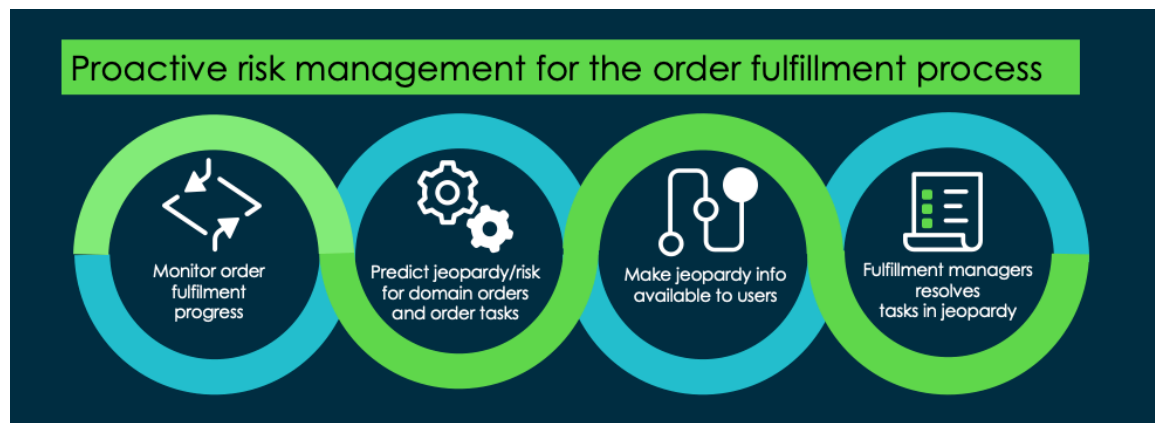
Jeopardy Management is a risk assessment tool that monitors fulfillment tasks, assesses the risk level, and alerts fulfillment managers when the assigned task time is in jeopardy.

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

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

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

Overview of Jeopardy Management



How Jeopardy Management works

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

Jeopardy Management components

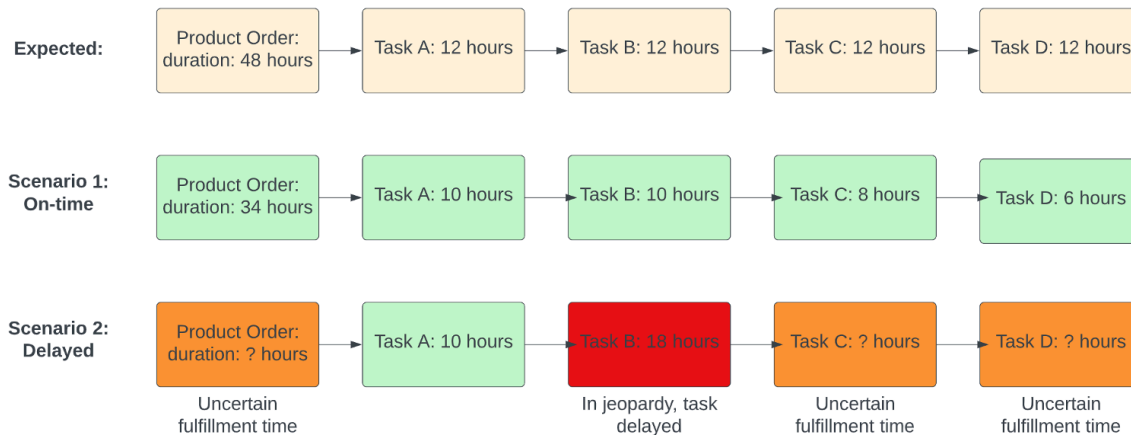
Define subflows & decision tables	Monitor order fulfillment progress	Predict jeopardy /risk	Share jeopardy info	Resolve tasks in jeopardy
- Define subflows that create order tasks upfront and define task relationships - Configure jeopardy policy decision tables	- Define and launch SLA for order tasks - Monitor fulfillment progress and closure of domain orders and order tasks	- Leverage planned task date fields and date roll up logic to produce timelines for order task fulfillment progression - Monitor the progress of each order task and produce jeopardy information - Rollup jeopardy date changes for all order entities	Use the order forms, list and orchestration UI forms to show jeopardy details for orders, domain orders and order tasks in order to prioritize tasks to take action	Based on jeopardy condition, customer can implement notifications or other logic as required based on jeopardy level flag on each entity jeopardy

Jeopardy Management alert levels

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

The following image shows several Jeopardy Management configuration examples.

Jeopardy Management scenarios



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

What to do next

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

- [Configuring Jeopardy Management](#)
- [Monitoring Jeopardy Management](#)

Jeopardy Management setup overview

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

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

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

Define Fulfillment Subflows

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

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

Create SLA Definitions

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

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

Link Jeopardy Management to Product and Service Specifications using Decision Builder

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

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

Jeopardy Management use cases

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

Design-time use cases

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

Use case: Configure business logic and workflows

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

Define jeopardy logic using Flow Designer to links product specifications and a fulfillment workflow.

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

Run-time use cases

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

Use Case: Support predictive jeopardy that monitors customer orders

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

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

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

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

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

Use Case: Support inflight orders and *Jeopardy Management*

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

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

Jeopardy Management roles and personas

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

Roles in Jeopardy Management

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

Personas and roles in Jeopardy Management

Persona	Responsibilities	Role
System administrator	- Configures fulfillment flows for Jeopardy Management. - Configures all jeopardy-related decision table rule sets that define jeopardy fulfillment policies. - Configures service level agreements (SLA) definitions for tasks. - Reviews and updates existing workflows and adds jeopardy actions when updates are required. - Reviews and updates jeopardy decision tables.	admin
Order fulfillment manager	- Reviews order jeopardy data for order impacts. - Assigns task jeopardy priorities to appropriate skilled agent for resolution. - Tracks and monitors timely fulfillment of customer order using jeopardy information. - Proactively mitigates jeopardy risks. - Escalates order jeopardy-related issues as needed.	sn_ind_tmt_orm.order_fulfillment_manager
Order fulfillment agent	- Tracks, monitors, and reviews order task progressions for jeopardy data and proactively acts on potential jeopardy-related issues. - Escalates jeopardy issues as appropriate to fulfillment managers.	sn_ind_tmt_orm.order_fulfillment_agent
Service order manager	- Reviews service order jeopardy data for potential service order impacts. - Assigns task jeopardy priorities to appropriate skilled agent for resolution. - Tracks and monitors timely fulfillment of customer orders by leveraging jeopardy information. - Proactively mitigates jeopardy risks. - Escalates jeopardy-related issues as needed.	sn_ind_tmt_orm.service_order_manager

Personas and roles in Jeopardy Management (continued)

Persona	Responsibilities	Role
Service order agent	- Tracks, monitors, and reviews order task progressions for jeopardy data. - Escalates order jeopardy impacts to the fulfillment manager.	sn_ind_tmt_orm.service_order_agent

Defining a horizontal relationship

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

Overview

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

Using a horizontal relationship

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

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

Asynchronous order processing for large customer and consumer orders

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

Overview

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

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

- Order validation
- Order ingestion
- Order creation

How synchronous order processing works

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

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

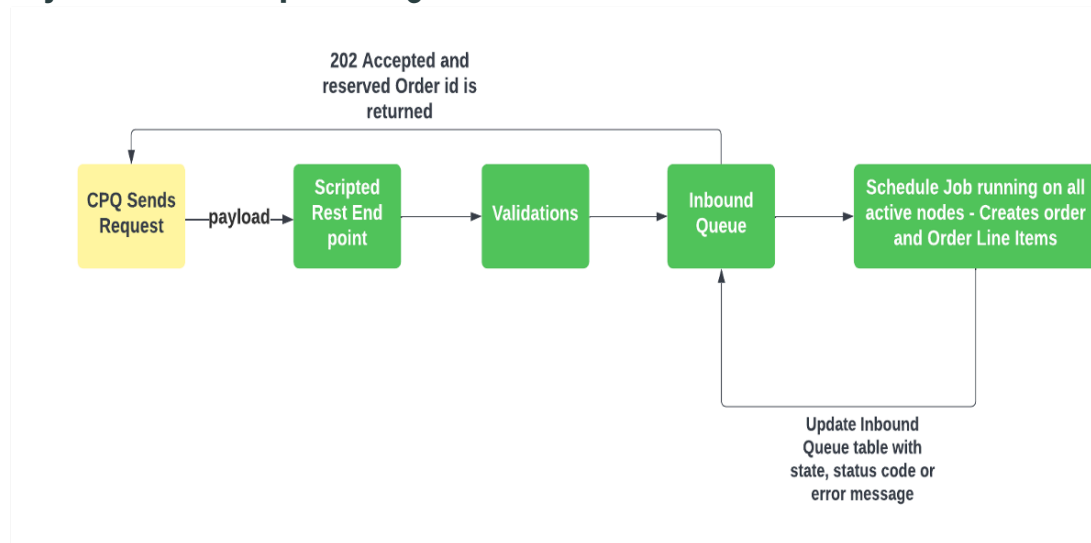
How asynchronous order processing works

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

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

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

Asynchronous order processing workflow



The asynchronous order processing follows these steps:

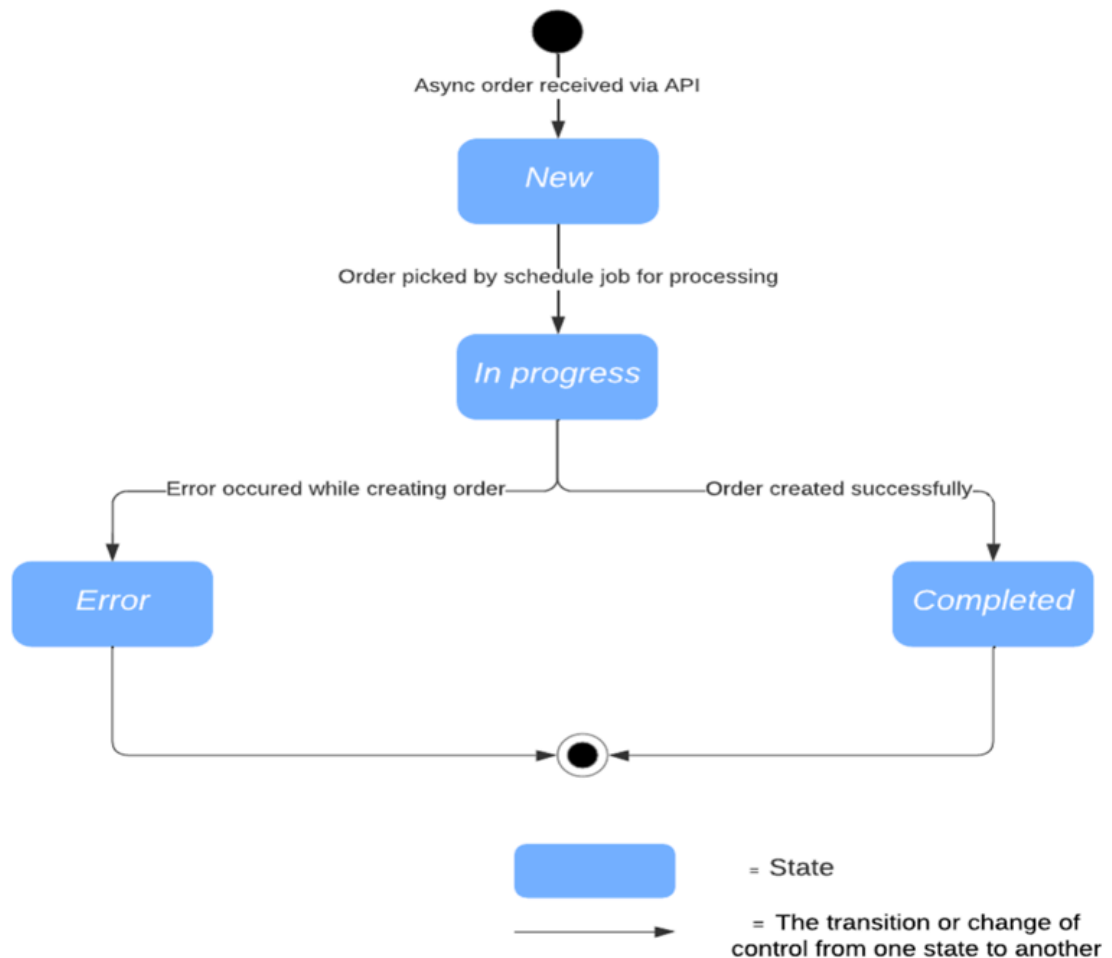
1. You must activate the Product Order Open API. The new parameter mode enables the API to process the orders synchronously or asynchronously. For more information about the API, see [Product Order Open API](#).
2. After you receive a high volume of orders or a large number of the order payloads through the Product Order Open API in the async mode, the order details are first validated. The order

details include the product offering, order line items, order specifications, order line items characteristics, and the specification relationship of order line items.

3. After the validation of the order details is complete, an entry for each order with a unique record ID is created in the Inbound Queue [sn_tmt_core_inbound_queue] table. The following diagram shows how the inbound queue state model works.

Inbound Queue state model

Inbound Queue State Model



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

Managing the orders for a 5G sliced network

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

Overview

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

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

- Create and manage the slice templates with the required slice attributes in their product catalog.
- Support slice specifications by using the slice templates to define the slice services.
- Support the ingestion of slice orders from external systems through the existing product order API.
- Decompose the slice orders and trigger the fulfillment workflows for the decomposed orders.
- Trigger the southbound slice orders with southbound attributes toward southbound systems, such as Network Slice Management Function (NSMF), by using the service order open API.

How a slicing order is managed

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

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

Note:

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

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

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

[store-future: BEGIN review]

External product inventory ID

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

Overview

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

Using an external ID

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

- Capture the external product inventory ID in the Order Management for Telecommunications, Media, and Technology system through the Product and Service Order APIs.
- Store the external inventory ID in a new table for new orders and associate them with the product inventory records that were created after the order fulfillment. Also, update the ID in the external product inventory table for any inflight revisions during the order fulfillment process.
- Allow external CPQ or southbound systems to use the external inventory ID to submit, change, disconnect, suspend, and resume orders on the product inventory in the order management system.

Note:

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

[End]

Updating specification versions

Enterprises frequently create and update new versions of product and service specifications. When these changes occur, it's important to update the existing product specification in ServiceNow®. Failure to update the product specifications may lead to difficulties with MACD (Move, Add, Change, Delete) operation when orders enter fulfillment.

Updating specification versions helps with:

- Introducing new characteristics along with their options.
- Adding new options to existing characteristics and removing existing characteristics or their options.
- Renaming existing characteristics and options.
- Incorporating new relationships and updating or removing existing relationships.
- Adding compatibility rules.

Specification version updates overview

The following list shows the types of specification version updates that can occur:

- Characteristics
 - New
 - Changed - enumerations
 - Removed
- Child Relationships (bundled/composed)
 - New
 - Removed
 - Change cardinality
- Horizontal Relationships/Compatibility Rules
- Attribute Mapping Rules

What to do next[Configuring specification version update](#)

Configuring Sales and Order Management applications

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

Configuring the Sales and Order Management applications includes several basic tasks:

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

Installing and configuring SOM applications

As a user with the admin role, complete the following main configuration tasks to set up your SOM applications.

SOM configuration tasks

Configuration task	Description
Install and configure the Opportunity Management application	Install the Opportunity Management application from the ServiceNow Store store. This application enables your sales agents and account executives to create and manage opportunities that identify and track potential sales based on identified customer needs.
Install and configure Quote Management	Install the Quote Management application from the ServiceNow Store store. It enables your sales agents to generate sales quotes for products or services that a customer wants to buy.
Install and configure the Order Management application	Install the Order Management application from the ServiceNow Store. This application enables your agents to capture, manage, and fulfill orders from enterprise customers. Note: If you have a Telecommunications Service Management subscription, install the Order Management for Telecommunications, Media, and Technology application from the store. This application includes the Order Management application and also the ServiceNow implementations of the TMF APIs for telecommunications products.
Assign user roles in Sales and Order Management	Review and assign roles to users of the SOM applications that you install.

Install and configure Opportunity Management

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

As a user with the admin role, complete the following configuration tasks to set up Opportunity Management.

Configuration tasks for Opportunity Management

Task	Description	Role
Install Opportunity Management	Install Opportunity Management from the ServiceNow® Store.	Admin
Assign user roles in Sales and Order Management applications	Assign the user roles for Opportunity Management, Product Catalog Management, and Pricing Management.	Admin
Configuring product offerings and catalogs	Create the product offerings and catalogs, unless they've been previously defined.	Product catalog admin
Configuring product pricing	Define the price lists , pricing strategies, and other pricing features that you want to use, unless they've been previously defined.	Pricing admin
Configure needs analysis	Create the needs templates that present a set of questions that agents complete to get product recommendations for sales opportunities.	Product catalog admin

Install Opportunity Management

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

Before you begin

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

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

Role required: admin

About this task

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

- Plugins
- Store applications
- Roles
- Tables

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

Procedure

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

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

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

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

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

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

Create opportunity stages

Create sales cycle stages for an opportunity.

Before you begin

Role required: sales_ops_specialist

Procedure

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

Opportunity Stage form

Fields	Descriptions
Name	Name of the opportunity stage. For example, Qualify or Develop or Propose or Negotiate.
Order	Number of orders that is in the opportunity stage.
Type	Type of the opportunity stages. For example, Open or Closed.

Fields	Descriptions
Active	When the checkbox is selected, the opportunity stage is active.

4. Select **Submit**.

The sales cycle stage has now been created for the opportunity.

Create a sales cycle for an opportunity

Create a sales cycle type for an opportunity.

Before you begin

Role required: sales_ops_specialist

Procedure

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

Sales Cycle Type form

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

4. Select **Submit**.

The sales cycle type has been created for the opportunity.

What to do next

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

Associate a sales cycle with the opportunity stage

Link one or multiple opportunity stages with a sales cycle.

Before you begin

Role required: sales_ops_specialist

Procedure

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

5. Select **Save**.

The sales cycle and opportunity stages have been associated.

Install and configure Quote Management

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

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

Configuration tasks for Quote Management

Task	Description	Role
Install Quote Management	Install Quote Management from the ServiceNow® Store. It provides these key features for your agents: • Build quotes with products and pricing, then present them to customers. • Use the product configurator to select simple and configurable product offerings. • Add pricing adjustments to products. • Convert quotes to product orders once customers have approved.	Admin
Assign user roles in Sales and Order Management applications	Set the roles for Quote Management users and your product catalog and pricing administrators.	Admin
Configuring product offerings and catalogs	Create the product offerings and catalogs, unless they've been previously defined.	Product catalog admin
Configuring product pricing	Define the price lists, pricing strategies, and other pricing features that you want to use, unless they've been previously defined. • Set the price lists and pricing strategies that control how pricing is applied to quotes.	Pricing admin

Configuration tasks for Quote Management (continued)

Task	Description	Role
	If you're using cost books, create the cost books that define the unit costs for product offerings.	
Activate cost books and cost margins	Use the <code>sn_quote_mgmt_core.enable_cost_margin_calculation</code> system property to activate the cost book and cost margin features in Quote Management. These features enable sales agents to view product unit costs and cost margins when creating sales quotes.	Quote Management admin

Install Quote Management

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

Before you begin

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

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

Role required: admin

About this task

The following items are installed with Quote Management:

- Plugins
- Store applications
- Roles
- Tables

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

Procedure

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

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

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

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

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

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

Configure Sales Agreement Management

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

Activate Sales Agreement Management

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

Sales Agreement Management plugins

Plugin	Description	Dependency
Sales Agreement Data Model [com.sn_sales_agmt_core]	This plugin provides foundational objects to manage sales agreements.	- Product Catalog Mgmt Core[com.sn_prd_pm] - Price Management [com.sn_csm_pricing]
Sales Agreement Management [com.sn_sales_agmt_wf]	This plugin provides workflow to create and manage sales agreements.	- Sales Agreement Data Model [com.sn_sales_agmt_core] - Lead to Cash Core [com.sn_l2c_core]

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

Request apps from the ServiceNow Store

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

Components installed with Sales Agreement Management

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

Roles installed

Sales Agreement roles details

Role	Description	Contains roles
sn_sales_agmt_core.sales_agreement_viewer	This role enables users to perform read operations on sales agreements, sales agreement lines, and related data such as characteristics, price lists, and other tables.	- sn_prd_pm.product_catalog_viewer (contains sn_prd_pm.characteristics_viewer) - sn_quote_mgmt_core.quote_viewer (contains sn_csm_pricing.pricelist_viewer)
sn_sales_agmt_core.sales_agreement_writer	This role enables users to perform, create, read, and update operations on sales agreements and sales agreement lines.	sn_sales_agmt_core.sales_agreement_viewer

Tables installed

Sales Agreement Management tables

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

[store-future: BEGIN review]

Install and configure Order Management

Learn how to configure the features and components that you need for customer and service order processing, depending on whether you are a provider or an enterprise customer.

Related topics

[Order Management](#)

[End]

[store-future: BEGIN review]

Configuring Order Management for service providers

If you have a Telecommunications Service Management subscription, you can complete the following configuration tasks to set up c Order Management for service providers.

Order Management configuration tasks for providers

Task	Description
Install Order Management.	Install the Order Management for Telecommunications, Media, and Technology application from the ServiceNow® Store.
(Optional) Install and set up Service Exchange service providers.	Optionally install and set up Service Exchange to integrate your ServiceNow instance with the ServiceNow instances of your customers. Service Exchange synchronously creates and publishes catalogs of products and services so that your customers can place product orders. Note: Although the Service Exchange legacy application is still supported, see Learn about Service Exchange for detailed benefits on using the current Service Exchange application. Most of the customer orders uploaded to your ServiceNow instance use your own API, or a ServiceNow supplied API based on the TMF622 Product Ordering API REST Specification. Use Service Exchange only if you support customers who also use the ServiceNow AI Platform in their operations. To learn more, see Product Order Open API.
Assign user roles in Sales and Order Management applications	Assign the user roles for the Order Management application, Product Catalog Management, and Pricing Management.
Set up versioned product offerings.	Create and publish versioned product offerings for your customers.
Associate customer contracts to product offerings.	Associate customer contracts to product offerings to provide access to products that the customer is entitled to.

Order Management configuration tasks for providers (continued)

Task	Description
Configure order fulfillment.	Configure order fulfillment to define how orders are decomposed and fulfilled.

[End]

[store-future: BEGIN review]

Install Order Management

If you have the admin role, you can install the Order Management application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins, if they aren't 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](#).

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

Role required: admin

About this task

The following items are installed with Order Management:

- Plugins
- Store applications
- Roles
- Tables

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

Procedure

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

Search for one of the following applications, depending on your entitlement and subscriptions:

- Order Management - Select this app to install the Order Management application.
- Order Management for Telecom, Media, and Tech: If you have a Telecommunications Service Management subscription, select this app, which installs the Order Management application, and the ServiceNow Open APIs for the TM Forum API REST specifications: Product Catalog, Service Catalog, Product Order, Service Order, Product Inventory, and Technical Service Qualification.

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 appear if they will be installed, are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Order Management.

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

[End]

[store-future: BEGIN review]

Assigning order fulfillment and provider roles for Order Management

Assign roles so that you can control user access to the features, capabilities, and data for the Order Management application. The configuration roles data that you create applies to the processing of customer orders and service orders.

Overview of fulfillment and provider roles

Your users can use the various functions that are available in the Order Management application, including:

- Product catalog management
- Customer order management
- Service order management
- Fallout management
- Inflight Order Change management
- Fulfillment manager

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

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

Product catalog management

The roles in the following table apply to Product Catalog management. To learn more about these roles, see [Setting up versioned specifications and product offerings for Order Management](#).

Product catalog management roles

Role	Description
Product Catalog Manager [sn_prd_pm.product-catalog_manager]	Role that enables a user with create, read, update, and delete access to the product, service, and resource specifications.
Product Catalog Admin [sn_prd_pm.product-catalog_admin]	Role that enables a user with create, read, update, and delete access to product, service,

Product catalog management roles (continued)

Role	Description
	resource specifications, characteristics, and characteristic options.
Product Catalog Viewer [sn_prd_pm.product-catalog_viewer]	Role that enables a user with read access to product, service, resource specifications, characteristics, and characteristic options.

Customer order management

The roles in the following table apply to Customer Order management. To learn more about these roles, see [Creating, changing, and cancelling manual product orders](#).

Customer order management roles

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

Customer order management roles (continued)

Role	Description
	Note: The Order Approver and Order Viewer roles are included in the Order Management Business Stakeholder role, which has a fee associated with it. Do not assign these roles to users without confirming that your organization has the appropriate entitlement. To learn more, see Activate Business Stakeholder .

Service order management

The roles in the following table apply to Service Order management. To learn more about these roles, see [Creating, reviewing, approving, and fulfilling service orders](#).

Service order management roles

Role	Description
Service Order Manager [sn_ind_tmt_orm.service_order_manager]	Role that enables a user to view and edit service order requests, service orders, resource orders, and related fulfillment tasks. A user with this role can also view, but not edit, order fallout records. The Service Order Manager can review external service order requests, review service order line items, ensure that service orders are ready for fulfillment, and then approve them.
Service Order Agent [sn_ind_tmt_orm.service_order_agent]	Role that enables a user with view access to service order requests, service orders, resource orders, and related fulfillment tasks. Service Order Agents can edit some fields on the service order tasks. After the Service Order Fulfillment Manager approves a service order, the agent performs these tasks. This role also includes the Order Viewer [order_view] role.

Fallout management

The roles in the following table apply to Fallout management. To learn more about these roles, see [Managing order fallout](#).

Fallout management roles

Role	Description
Fallout Manager [sn_fallout_mgmt.fallout_manager]	Role that enables a user to create, view, assign, and edit fallout records. A user with

Fallout management roles (continued)

Role	Description
	this role can also view order tasks and domain orders. To learn more, see Managing order fallout .
Fallout Agent [sn_fallout_mgmt.fallout_agent]	Role that enables a user to view fallout records. A user with this role can also update the state of fallout records and create work notes on them. To learn more, see Review a fallout record .

[End]

[store-future: BEGIN review]

Setting up versioned specifications and product offerings

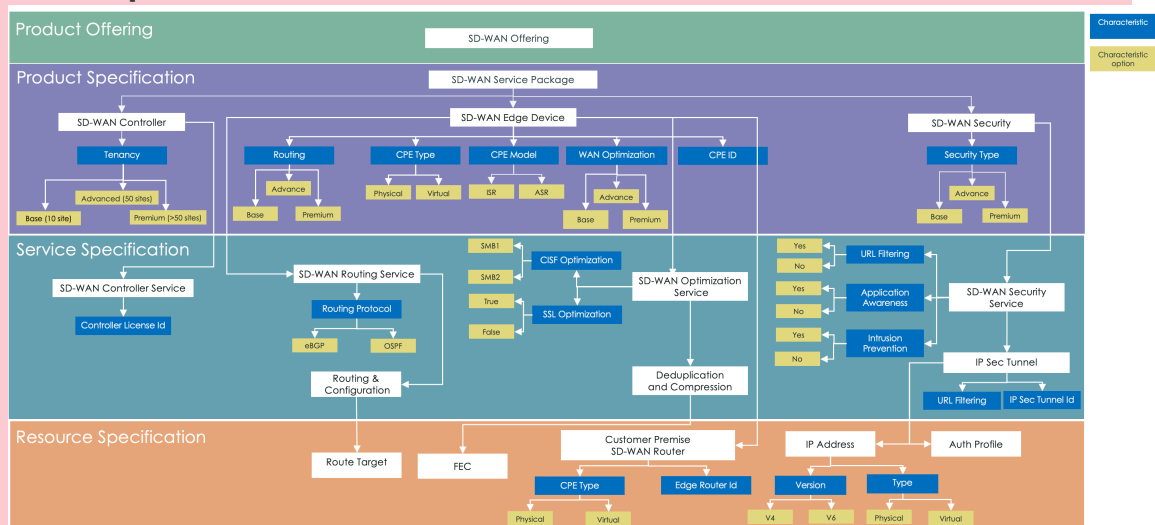
By creating and publishing your versioned specifications and product offerings in a product catalog, your customers can order up-to-date versions of the products or services that they require. Your product catalog manager can create versions of the published specifications and product offerings with the required enhancements to support your customer's business, marketing, manufacturing, or operational changes.

Overview of product offerings

As a product catalog manager, you set up product offerings in a product catalog. A product offering contains the product description, pricing, eligibility, and product options. You use a product catalog to group your product offerings so that your customers can order the products or services that they want. Only published product offerings can be added to customer contracts.

For example, the following diagram shows the relationships between the product offerings, the product specification, the service specification, and the resource specification for an SD-WAN product model.

SD-WAN product model



Each product offering has the following components:

Product specification

A product specification defines the various aspects of a product including the following:

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

To learn more, see [Create and publish product specifications](#).

Service specification

A service specification defines a service, and the technical information of that service, including the following:

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

To learn more, see [Create and publish service specifications](#).

Resource specification

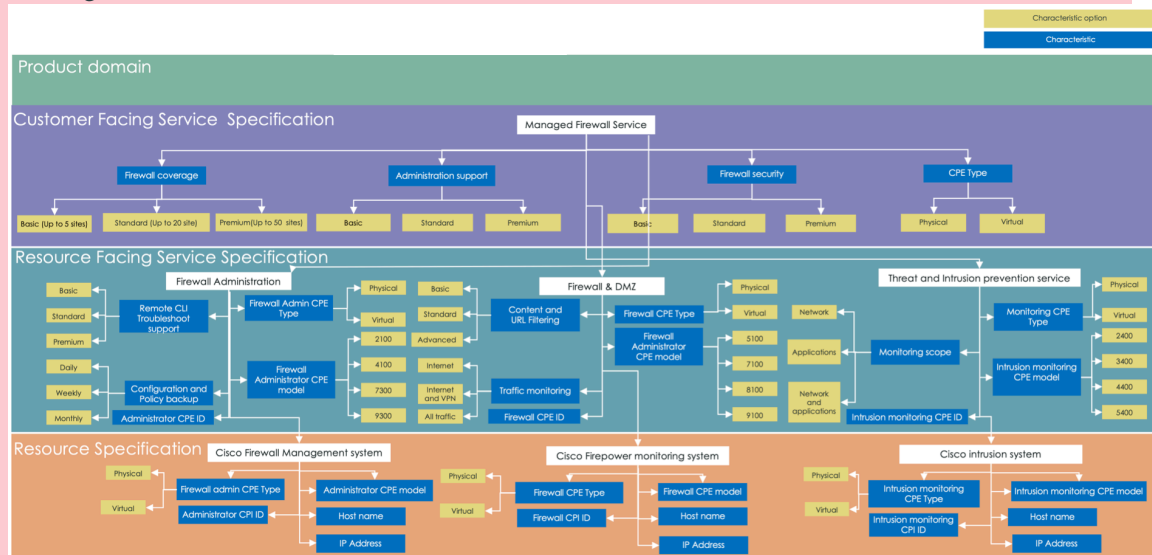
A resource specification defines the technical information for a resource, including the following:

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

To learn more, see [Create and publish resource specifications](#).

The following example shows a managed firewall service structure that incorporates service and resource specifications.

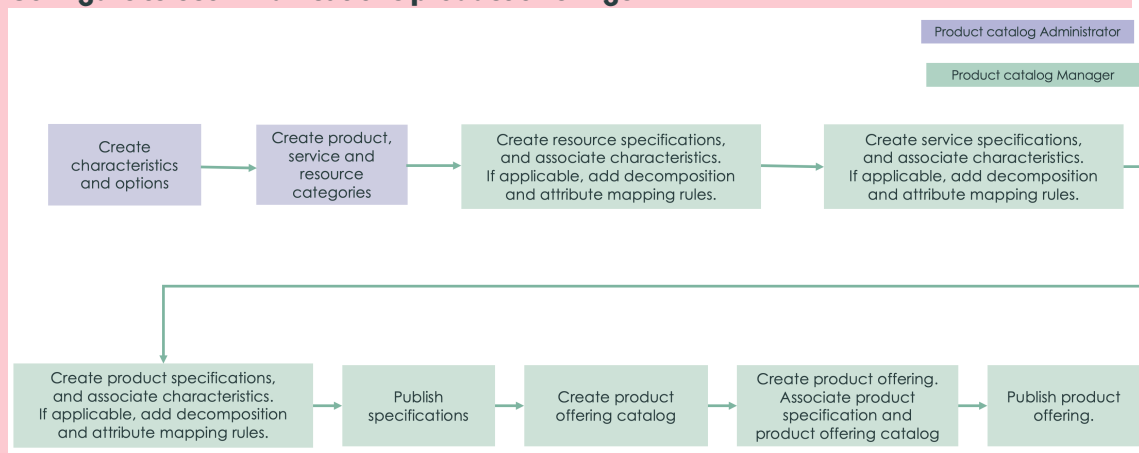
Managed firewall service structure



Setting up your initial specifications and product offerings

The following example diagram and summary shows the sequence that you can use to set up telecommunications product offerings for your customers.

Configure telecommunications product offerings



1. Create characteristics and characteristic options. To learn more, see [Create the characteristics and characteristic options for your product offerings](#).
2. Create product, service, and resource specification categories and associate them with model categories. To learn more, see [Create and associate specification categories with model categories](#).
3. Create and publish the initial base versions of your product, service, or resource specifications. For each specification, create the specification relationships, decomposition rules, and attribute mappings. To learn more, see:
 - [Create and publish resource specifications](#)
 - [Create and publish service specifications](#)
 - [Create and publish product specifications](#)
 - [Create specification relationships and decomposition rules](#)
 -

4. Create and publish the initial base versions of your product offerings. To learn more, see [Create your product offerings and publish to a catalog](#).
5. Create a product catalog. To learn more, see [Create a product catalog](#).

Creating versions of specifications and product offerings

You can create and publish versioned specifications and product offerings so that your customers can order the most up-to-date versions of your product and service offerings. To learn more, see:

- [Creating and publishing new specification versions](#)
- [Creating and publishing new product offering versions](#)

The following process describes the steps for creating a version of a specification or a product offering:

1. Create and assign a new version number in each of the product, service, resource specifications, or product offerings that are affected by the changes. To learn more, see [Create and publish resource specifications](#).
2. For each specification in the new version, create the required specification relationships, decomposition rules, and attribute mappings. To learn more, see:
 - [Create specification relationships and decomposition rules](#)
 - [Defining mappings for attribute value propagation to domain orders](#)
3. Create a product offering, and then publish it when you update your product catalog. To learn more, see [Creating and publishing new specification versions](#).
4. Retire or archive old or unused specifications, and product offerings, as needed. To learn more, see [Retiring and archiving versioned specifications and product offerings](#).

Note:

You can't use versioned or non-versioned catalog entities, such as specifications and product offerings, in ordering, inventory, or for other purposes when they are in a Draft state. For example, you can't select and use a product offering in Order Capture if it is still in a Draft state.

Related topics

[Product catalog data model and catalog versioning](#)

[End]

[store-future: BEGIN review]

Create the characteristics and characteristic options for your product offerings

Create characteristics and characteristic options so that you can define the product attributes and options for the product offerings that your customers can order from.

Before you begin

Role required: sn_prd_pm.product-catalog_admin

Procedure

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

For information about the field descriptions, see the Characteristics form fields section in [Product catalog forms in Order Management for Telecommunications and Media](#).

4. Save the form by right-clicking it.
If you selected **Choice** in the **Input Type** field, the Characteristic Options related list appears.
5. To create selectable options for the characteristic, click **New**.
6. Enter your option, which is automatically associated to the characteristic that you created.
For example, if you create a SIM card type characteristic, you then create the associated **Nano**, **eSim**, **Micro**, **Mini**, and **Standard** options.
7. Click **Submit**.
8. On the Characteristics form, click **Update**.

What to do next

Create product, service, and resource specification categories and associate them with model categories.

[End]

[store-future: BEGIN review]

Create and associate specification categories with model categories

Create product, service, and resource specification categories that you can associate with model categories to determine the product model and fulfillment workflow of a product offering for your customer.

Before you begin

Role required: sn_prd_pm.product-catalog_manager

About this task

When you add specification categories, you can associate product, service, and resource specifications with specific model categories for reporting purposes and determining the associated workflow. Specification categories work with defined decision tables that help resolve complex decisions that depend on multiple factors.

- The associated model category determines how the ServiceNow AI Platform creates an asset from a configuration item (CI), and to what asset class it belongs. The category dictates how products, services, and resources are modeled within the legacy product catalog
- Decision tables that are associated with the specification category determine how fulfillment workflows are generated for an ordered item.

To learn more about model categories and decision tables, see the following:

- [Model categories](#) 
- [Decision tables](#) 

Procedure

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

Specification categories form

Field	Description
Specification Category	Name of the specification category.
Category	Model category to which the specification category belongs.

4. Select **Submit**.

What to do next

Create product, service, and resource specifications and associate specification categories with them.

Related topics

[Product Catalog](#) 

[Models](#) 

[Decision Tables](#) 

[End]

[store-future: BEGIN review]

Create and publish resource specifications

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

Before you begin

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

- [Create the characteristics and characteristic options for your product offerings](#)
- [Create and associate specification categories with model categories](#)

Role required: sn_prd_pm.product-catalog_manager

About this task

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

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

Note:

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

- [Creating and publishing new specification versions](#)
- [Create and publish a new specification version](#)

Procedure

1. Navigate to **All > Product Catalog Management > Resource Specifications**.

2. Select **New**.

3. On the form, fill in the fields.

For information about the field descriptions, see the Resource specifications form fields section in [Product catalog forms](#).

4. Select **Submit**.

5. In the Resource Specifications list, select the resource specification that you created. The resource specification record appears, with the Specification Characteristics and Specification Relationships related lists.

6. To associate the characteristics and characteristic options with your resource specification, navigate to the Specification Characteristics related list and select **New**.

7. To create the specification relationships and accompanying decomposition rules, navigate to the Specification Relationships related list and select **New**. For more information on creating relationships, see [Create specification relationships and decomposition rules](#).

8. To create attribute mappings, navigate to the Attribute Mappings related list and click **New**. For more information on the mappings for attribute propagation, see [Defining mappings for attribute value propagation to domain orders](#).

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

[End]

[store-future: BEGIN review]

Create and publish service specifications

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

Before you begin

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

- [Create the characteristics and characteristic options for your product offerings](#)
- [Create and associate specification categories with model categories](#)

Role required: sn_prd_pm.product-catalog_manager

About this task

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

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

Note:

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

- [Creating and publishing new specification versions](#)
- [Create and publish a new specification version](#)

Procedure

1. Navigate to **All > Product Catalog Management > Service Specifications**.

2. Select **New**.

3. On the form, fill in the fields.

For information about the field descriptions, see the Service specifications form fields section in [Product catalog forms](#).

4. Select **Submit**.

5. In the Service Specifications list, select the service specification that you created. The service specification record appears, with the Specification Characteristics and Specification Relationships related lists.

6. To associate the characteristics and characteristic options with your service specification, navigate to the Specification Characteristics related list and select **New**.

7. To create specification relationships, and accompanying decomposition rules, navigate to the Specification Relationships related list and select **New**.

For more information on creating relationships, see [Create specification relationships and decomposition rules](#).

8. To create attribute mappings, navigate to the Attribute Mappings related list and select **New**. For more information on mappings for attribute propagation, see [Defining mappings for attribute value propagation to domain orders](#).

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

[End]

[store-future: BEGIN review]

Create and publish product specifications

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

Before you begin

You can create characteristics, characteristic options, and specification categories. To learn more about characteristics, characteristic options, and specification categories, see the following:

- [Create the characteristics and characteristic options for your product offerings](#)
- [Create and associate specification categories with model categories](#)

Role required: sn_prd_pm.product-catalog_manager

About this task

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

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

For example, you define a product specification for an SD-WAN service package and you designate it as a composite product specification for a complex enterprise product specification.

- A composite product is typically composed of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they form a single complex product.
- The SD-WAN service package consists of three bundled product specifications, two of which are designated as mandatory items that the user must select. The third specification is for an optional security package. The SD-WAN service package is a container or wrapper for the three other products.

Note:

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

- [Creating and publishing new specification versions](#)
- [Create and publish a new specification version](#)

Procedure

1. Navigate to **All > Product Catalog Management > Product Specifications**.

2. Select **New**.

3. On the form, fill in the fields.

For information about the field descriptions, see the Product specifications form fields section in [Product catalog forms](#).

4. Select **Submit**.

5. In the Product Specifications list, select the product specification that you created. The product specification record appears, with the Specification Characteristics and Specification Relationships related lists.

6. To associate the characteristics and characteristic options with your specification, navigate to the Specification Characteristics related list and select **New**.

7. To create specification relationships and accompanying decomposition rules, navigate to the Specification Relationships related list and select **New**.
For more information on creating relationships, see [Create specification relationships and decomposition rules](#).

8. To create attribute mappings, navigate to the Attribute Mappings related list and click **New**.
For more information on mappings for attribute propagation, see [Defining mappings for attribute value propagation to domain orders](#).

9. To create a product offering from the specification, navigate to the Product Offerings related list and select **New**.

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

[End]

[store-future: BEGIN review]

Defining mappings for attribute value propagation to domain orders

By defining attribute-mapping rules between two specifications in the product catalog, your fulfillment agents can access all relevant characteristic values in your product, service, and resource orders.

Overview

Orders contain many characteristics and characteristic values that are populated at different stages of the order life cycle. Order Management automatically propagates and transforms the characteristics and characteristic values throughout the order fulfillment process. This automatic propagation of attributes across the product, service, or resource orders help to improve your operational efficiency and eliminate errors in the fulfillment process.



Note:

Attribute values are another name for order characteristic values.

When value attribute values are assigned and how they're used

Orders contain many characteristics and characteristic values that are populated at different stages of the order life cycle. Multi-site enterprise orders contain various attributes that are related to customer, product, service, and resource information. The ServiceNow AI Platform populates these attributes with the corresponding values at the different stages of the order life cycle. To learn more, see [Use scenario](#).

The ServiceNow AI Platform decomposes orders and order line items into various suborders (product, service, and resource orders) and assigns them to different user groups and users. Different user groups then work with the various suborders to complete the required fulfillment tasks for a given order.

Catalog-driven attribute-mapping and value propagation

The order fulfillment flow needs prior knowledge on how specification characteristics are mapped and associated so that information is propagated from one domain order to another domain order. If you're a product catalog manager, you can define rules-driven attribute mappings between and among selected product, service, and resource specifications. When you define attribute mappings, validations run to ensure that they're unique, don't conflict with each other, or conflict with defined specification relationships and decomposition rules.

To learn more about specification relationships, see [Create specification relationships and decomposition rules](#).

The Order Management application executes attribute mappings during the order fulfillment process and sets and propagates order characteristic values across the various suborders.

The order fulfillment process evaluates the attribute-mapping rules that you define. The attribute values are propagated from the domain orders that are associated with the source specification to the domain orders that are associated with the target specification.

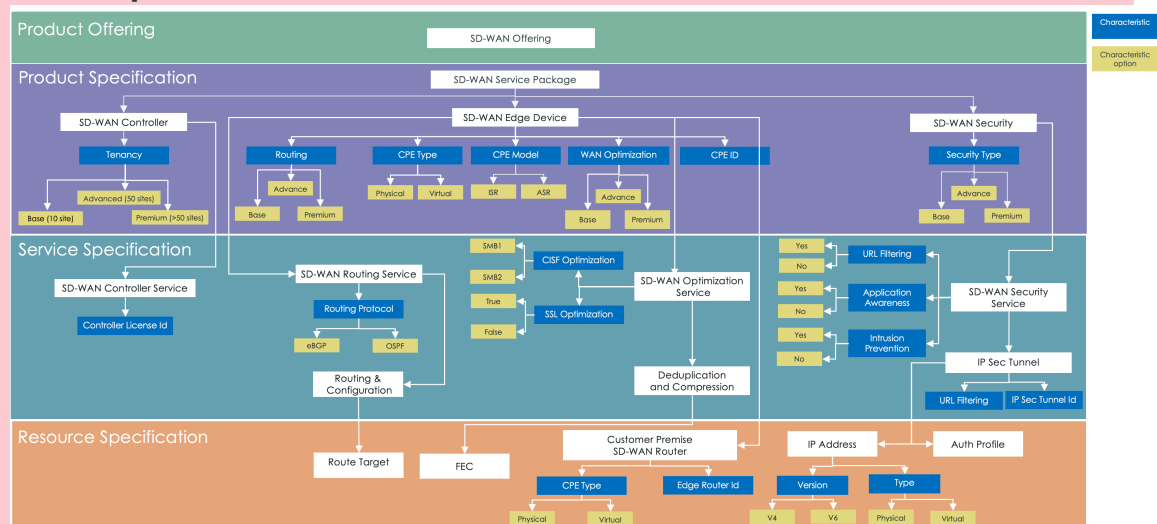
With catalog driven rule-based attribute propagation, your fulfillment agents have all the relevant and correct information that they require to work effectively on order tasks. The attribute-mapping functionality reduces errors and improves efficiency in the order fulfillment process as follows:

- Without rules-driven attribute mapping, your users have to assign the attribute values manually, which can be error-prone and time-consuming.
- These values propagate to lower domain orders and are used for inventory creation, service activation, and account and billing updates. Fixing an error takes a significant amount of effort and time for your users when these values are manually assigned.
- Attribute mappings ensure that crucial data flows properly through the associated domain orders. This process ensures that users with different roles use consistent data when they're processing an order.

Use scenario

Let's look at how an attribute-mapping rule is defined. For example, when a customer orders an SD-WAN Service Package, the selected characteristics for the SD-WAN edge device drive the generation of the associated product, service, and resource orders. By maintaining the correct attribute relationships in the source and target specifications, you ensure that the corresponding data values are correctly set for the associated domain orders. The following diagram shows the SD-WAN product model.

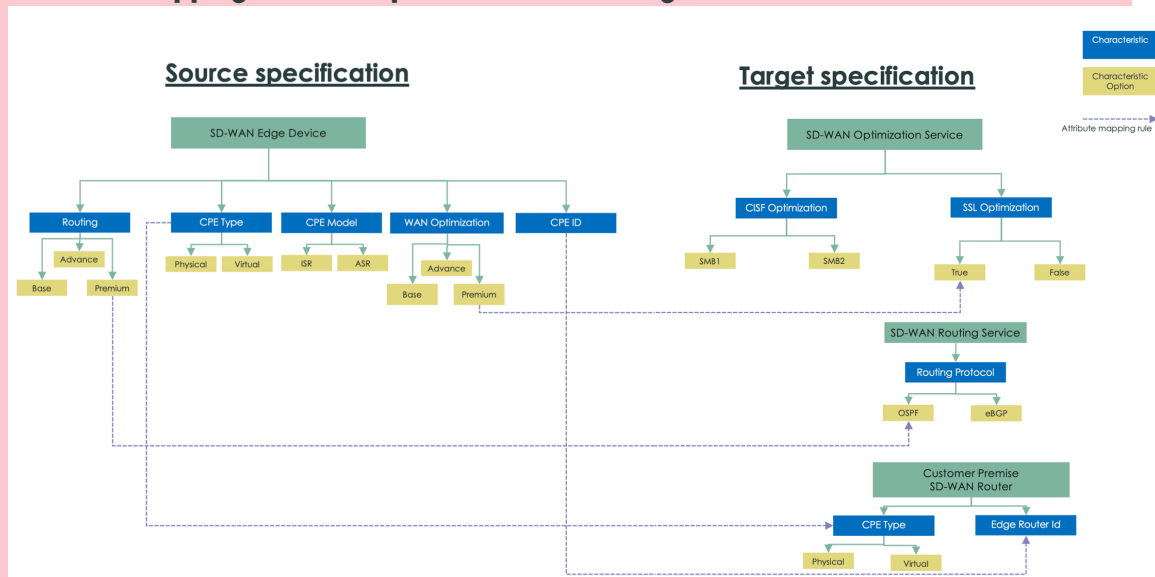
SD-WAN product model



The following diagram shows the mapped relationships between the selected characteristics in the source SD-WAN edge device specification and the services that result from their selection:

- If a customer selects Premium Routing, the SD-WAN routing characteristic is defined with the OSPF Routing Protocol characteristic option.
- If a customer selects Premium SD-WAN Optimization, the customer gets the SD-WAN Optimization Service with SSL Optimization as the result.
- CPE type selections for the SD-WAN edge device specification define the CPE type for the Customer Premise SD-WAN router specification.

Attribute-mapping relationships for an SD-WAN edge device



When you create an attribute-mapping rule for these relationships, it results in the following record:

Attribute mapping for the SD-WAN edge device product specification

Number	Source Specification	Source Characteristic	Source Characteristic Option	Target Specification	Target Characteristic	Target Characteristic Option
ATRMP0000001	SD-WAN Edge Device	Routing	Premium	SD-WAN Routing	Routing Protocol	OSPF
ATRMP0000002	SD-WAN Edge Device	CPE Type		Customer Premise SD-WAN Router	CPE Type	
ATRMP0000003	SD-WAN Edge Device	WAN Optimization	Premium	SD WAN Optimization Service	SSL Optimization	True
ATRMP0001001	SD-WAN Edge Device	CPE Id		Customer Premise SD-WAN Router	Edge Router Id	

Related topics

[Customer order decomposition after fulfillment approval](#)

[End]

[store-future: BEGIN review]

Define domain order attribute mappings

Create rules-driven attribute mappings to define the relationships and associations between and among product, service, and resource specifications, and how attribute values propagate for these mappings.

Before you begin

Role required: sn_prd_pm.product_catalog_manager

About this task

Attribute propagation enables you to define attribute mappings to do the following actions:

- Define the attribute mapping from any specification to any other specification that is available in the product and service hierarchy. These selections include siblings and horizontal relationships.
- Designate the same characteristic and characteristic options in both the source and target specifications.

- Select different characteristics and characteristic options in the source and target specifications.
- Select a higher-level specification and lower-level specification, or a lower-level specification and a higher-level specification, within a product offering.

Note:

If you create specification relationships and accompanying decomposition rules, the ServiceNow AI Platform performs the required validations when you attempt to create attribute mappings. These validations ensure that your attribute mappings are unique and don't adversely impact existing decomposition rules.

Note:

To learn more about specification relationships and decomposition rules, see [Create specification relationships and decomposition rules](#).

If a decomposition rule depends on an attribute-mapping rule, the order decomposition process isn't able to decompose the order because it's waiting for the attribute-mapping rule to provide the characteristic value that is required for order decomposition. The following warning appears when you save a decomposition or an attribute-mapping rule that would cause a dependent relationship with an adverse impact:

Attribute mapping rule impacts decomposition rule in {0} specification for {1} characteristic. Update this record to eliminate this rule dependency.

Procedure

1. Navigate to **All > Product Catalog Management > Specifications**.
2. In the application navigator, select the module that you want.
3. Select the Attribute Mappings related list.
4. Select **New**.
5. On the form, fill in the fields.

Attribute Mappings form

Field	Description
Source Specification	Source specification that contains the source characteristic and characteristic option to associate with the selected target specification, characteristic, and characteristic option. Based on your selection in the previous step, this field auto populates with your selected product, service, or resource specification.
Source Characteristic	Source characteristic to associate with the selected target specification, characteristic, and characteristic option.
Source Characteristic Option	Source characteristic option to associate with the selected target specification, characteristic, and characteristic option.

Field	Description
	Select the appropriate characteristic option that is associated with the product. Selecting a characteristic option makes the attribute mappings even more granular than only selecting a characteristic.
Target Specification	Target specification that you are associating with the selected source specification, source characteristic, and source characteristic option.
Target Characteristic	Target specification characteristic that you're associating with the selected source specification, source characteristic, and source characteristic option.
Target Characteristic Option	Target specification characteristic option that you're associating with the selected source specification, source characteristic, and source characteristic option. Select the appropriate characteristic option that is associated with the product. Selecting a characteristic option makes the attribute mappings even more granular than only selecting a characteristic.

6. Click **Submit**.

Result

The order fulfillment process evaluates the attribute-mapping rules that you define. The attribute values are propagated from the domain orders that are associated with the source specification to the domain orders that are associated with the target specification.

What to do next

Create and publish your offerings to a product catalog.

[End]

[store-future: BEGIN review]

Create specification relationships, quantity mapping, and decomposition rules for Order Management

Create the specification relationships and optional decomposition rules that define the associations between the product, service, and resource specifications for a product that you offer. These relationships impact how an order is fulfilled for a customer.

Before you begin

Role required: sn_prd_pm.product-catalog_manager

About this task

Specification relationships define the relationships and associations between the product, service, and resource specifications. They designate how an order that contains the source specification is decomposed, fulfilled, and delivered to the customer. For example, if you have a

product that you deliver through a service specification, you can designate that it is composed of three unique service specifications (product, service, or resource).

Note:

The target product, service, or resource specification you select in the **Target Specification** field can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field.

You can also select the characteristic options of the quantity characteristic for the specification relationship to provide the quantity of the target specifications. The order decomposition process refers to the mapped quantity to decompose the order for the source specification and creates the required number of domain orders for the target specification.

If the quantity characteristic has a number as a characteristic option, the decomposition process refers to the characteristic option and creates the number of domain orders for the target specification.

Optionally, you can create decomposition rules for the selected source and target specification relationships. The specification relationships can have product, service, or resource specifications as the source specifications.

Note:

To learn more, see the following:

- [Order quantity support in Order Management](#)
- [Customer order decomposition after fulfillment approval](#)

Procedure

1. Navigate to **All > Product Catalog Management > Specifications**.
2. In the application navigator, select the appropriate module.
3. Select the Specification Relationships related list.
4. Select **New**.
5. On the form, fill in the fields.

For information about the field descriptions, see the Specifications Relationships form fields section in [Product catalog forms](#).

6. Select **Update**.

What to do next

Optionally, create decomposition rules for selected specification relationships that have a product, service, or resource specification as the source specification. For more information, see: [Create decomposition rules for specification relationships](#).

[End]

[store-future: BEGIN review]

Create decomposition rules for specification relationships

Define an optional decomposition rule that excludes the service specification when a customer does not select a specific option. You can create optional decomposition rules for specification relationships that have a product specification that you define as the source specification.

Before you begin

Role required: sn_prd_pm.product-catalog_manager

About this task

Decomposition rules enable you to exclude certain associated specifications when a product is decomposed during the ordering process. For example, an SD-WAN Edge device product specification contains different characteristic options, including routing and optional WAN optimization, as defined in its specification relationship. You can define a decomposition rule that excludes the service specification when a customer does not select an option. An example is WAN optimization. When the order is fulfilled, a service order does not generate for WAN optimization.

Note:

Decomposition rules are only valid for a product specification. If you create attribute propagation maps, the following message appears when you try to create a decomposition rule that depends on a previously defined attribute-mapping rule:

The decomposition rule record (rule ID) will have dependency on the Attribute mapping rule (rule id). Update this record to avoid dependency on the attribute mapping rule.

To learn more about attribute mapping, see [Defining mappings for attribute value propagation to domain orders](#).

Procedure

1. In the Specification Relationships related list, select the open record icon () next to the supplier relationship that you want to add the decomposition rules for. The associated Specification Relationship record appears.

Note:

You can only create decomposition rules for specification relationships that have a product specification as the source specification.

2. Select **Open Record**.
3. In the Decomposition Rules related list, select **New**.
4. On the form, fill in the fields.

For information about the field descriptions, see the Decomposition rules form fields section in [Product catalog forms](#).

5. Select **Submit**.

[End]

[store-future: BEGIN review]

Create and publish your product offerings to a catalog

Create and publish versioned product offerings to a product catalog so that you can define how you sell your products to your customers.

Before you begin

Role required: sn_prd_pm.product-catalog_manager

About this task

A versioned product offering is the customer-facing entity of a product. It contains the product description, pricing, eligibility, and product options. A versioned product offering is always associated with a product specification. Only published product offerings can be added to customer contracts.

Procedure

1. Navigate to **All > Product Catalog Management > Offerings > Product Offerings**.

2. Select **New**.

3. On the form, fill in the fields.

For information about the field descriptions, see the Product offerings form fields section in [Product catalog forms](#).

4. Select **Submit**.

5. In the Product Offerings list, select the versioned product offering that you created.
The versioned product offerings record appears, with the Product Offering Characteristics and Product Visuals related lists.

6. Add additional characteristics to your versioned product offering, if required.

7. **Optional:** Add product visuals to your versioned product offering.

a. In the Product Visuals related list, select **New**.

b. Enter a name for the visual.

c. To select an image file to upload, select **Click to add**.

d. To set your image as the primary image for the product, select **Set Primary**

Note:

You can add multiple images for products, but the service catalog only supports one image per product when it is published to the service catalog.

8. When you finish creating the product offering version, do one of the following actions.

What to do next

Add versioned product offerings to your product catalog.

[End]

[store-future: BEGIN review]

Create a product catalog

Create a product catalog to add your product offerings. As a provider, you can use the product catalog to define how you want to sell products to your customers.

Before you begin

Role required: sn_prd_pm.product-catalog_manager

About this task

The product catalog that the product offering is associated with appears in the form of a category in the service catalog on the customer's self-service portal. It groups similar product offerings that are targeted for a market or customer segment. A product offering becomes a catalog item within this category.

Procedure

1. Navigate to **All > Product Catalog > Offerings > Product Offering Catalogs**.
2. Click **New**.
3. On the form, fill in the fields.

Product catalog form

Field	Description
Number	ID of the product catalog.
Name	Name of the product catalog.
Description	Description of the product catalog.

4. Click **Submit**.

What to do next

If you have a Telecommunications Service Management subscription and are using Order Management for Telecommunications, Media, and Technology, you can associate a customer contract with a product offering to trigger a Service Bridge entitlement, which pushes the product offering to the customer's instance. The offering catalog that the product offering is associated with appears in the form of a category in the service catalog on the customer's self-service portal. The product offering becomes a catalog item within this category.

[End]

[store-future: BEGIN review]

Creating and publishing specification versions in Order Management for Telecommunications, Media, and Technology

As a product catalog manager, you can create and publish the specification versions that list the improved products and services that you can offer to your customers in a product catalog.

Overview

As a service provider, you define the products, services, and resources in your product catalogs so that your customers can decide what to purchase from you. Your catalog items will continue to evolve over time to accommodate the changes that are related to how your items are sold, configured, and delivered to your customers. Typically, these changes are related to engineering improvements that make the products, services, and resources more marketable and appealing to your customers. The changes usually are to the fit, form and function, characteristics, and characteristic options, and specification relationships of your catalog items. For example, a home internet product may evolve over multiple revisions to support changes that are related to pricing and increased internet speeds.

As a product catalog manager, you create new specification and product offering versions for your products. Proper versioning enables your customer service agents to know what the latest versions of your product and service offerings are when they sell more expensive, complementary, upgraded, or related products to your customers.

Creating specification versions for use in product offerings

As a product catalog manager, you do the following actions when you create a version of a specification for use in a product offering:

1. Create and assign a version number in each of the product, service, or resource specifications or product offering records that are affected by the changes.
2. Create the required specification relationships, decomposition rules, and attribute mappings for each specification in the new version. As a product catalog manager, you update the following information to reflect the engineering changes that were made to the associated specifications:
 - Characteristics
 - Characteristic options
 - Specification relationships
 - Decomposition rules
 - Quantity mappings
 - Attribute propagation rules

Note:

To learn more, see [Create and publish a new specification version](#).

3. Create a product offering, and then publish it when you update your product catalog. To learn more, see [Creating and publishing new product offering versions](#).
4. Retire or archive old or unused specifications, and product offerings. To learn more, see [Retiring and archiving versioned specifications and product offerings](#).

Updates and validations that are performed when you create and publish a specification version

When you create a version for a currently published specification, the ServiceNow AI Platform[®] copies the following data into, or populates, the new specification record as follows:

1. Copies the following fields with these basic specification details:

- **Category**
- **Type**
- **Start** and **End** date
- **Description**
- **External ID**
- **Product code** and **Product line**
- **Cost to Company**
- **Composite**
- **Installation Required**
- **Location-specific**

2. Blanks out the **External Version** field.

Note:

The **External ID** and **External Version** fields don't appear on the specification forms by default but can be added by changing the form layouts.

3. Populates the following fields with the detailed information that you enter for the new specification version:

- **Version.** The next incremental number appears.
 - **Display Name.** The display name is the system-assigned concatenation of the specification name and its current version number. You can overwrite this field.
 - **Initial Version.** The name of the base version of the specification appears but can't be changed.
 - **Previous Version.** The name of the specification is as it was in the previous version.
4. Copies the associated characteristic and characteristic options. To learn more, see [Create the characteristics and characteristic options for your product offerings](#).
 5. Copies the associated specification relationships, attribute mapping, decomposition rules, and quantity mappings when you use extension point scripts. When copied, the source specifications in the associated specification relationship and decomposition rule records are automatically updated to the current versions of the source specifications. For example, if an SD-WAN Edge Device was the source specification in these records, and you created a new SD-WAN Edge Device version 2, that becomes the new source specification.

Note:

To learn more about these rules, see [Create specification relationships and decomposition rules](#).

6. Copies the associated quantity mappings and attribute propagation rules. The source specifications in the quantity mappings and attribute propagation rules are also updated to the current versions. To learn more about these rules, see [Defining mappings for attribute value propagation to domain orders](#).

When you publish the updated specification version, the ServiceNow AI Platform[®] performs validations on your edits. These validations ensure that all rules are valid with the characteristic and characteristic options that are available for the new specification version. An error might occur if you inadvertently remove or change the characteristics or characteristic options that are referenced by the other rules that are associated with the new specification version. If an error occurs, a message similar to this example appears.

Copied rules validation errors

Errors ✕

Decomposition Rule:
 - SD-WAN Edge Device v2 - Realized as - SD WAN Optimization Service contains invalid characteristic: WAN Optimization.

Quantity Mapping:
 - SD-WAN Edge Device v2 - Realized as - SD WAN Optimization Service has a quantity mapping rule which contains invalid characteristic options: Advance
 - SD-WAN Edge Device v2 - Realized as - SD WAN Optimization Service has a quantity mapping rule which contains invalid characteristic options: Base
 - SD-WAN Edge Device v2 - Realized as - SD WAN Optimization Service has a quantity mapping rule which contains invalid characteristic options: Premium

Invalid update

You can publish a new specification version only after you resolve all errors. This table contains some possible validation errors that you may see and the actions you can take to resolve the issue.

Copied rules validation errors and resolution actions

Error	Resolution actions
Invalid specification version in the specification relationship.	Update the source specification version to the current version:

Copied rules validation errors and resolution actions (continued)

Error	Resolution actions
	1. Click Specification Characteristics. 2. Update the Source Specification field in the Specification Relationships form. For example, if you're creating SD-WAN Edge Device version 2, and it contains the previously published SD-WAN Edge Device version 1, update the field accordingly.
Invalid specification versions in the decomposition rule.	Update the source specification version to the current version: 1. Click Specification Relationships. 2. Update the Source Specification field in the Specification Relationships form.
Invalid characteristic in the decomposition rule.	Update or remove the invalid characteristic in the Decomposition Rules form: 1. Click Specification Characteristics. 2. Update or remove any invalid characteristics.
Invalid characteristic options in the decomposition rule.	Update or remove the invalid characteristic options in the Decomposition Rules form: 1. Click Specification Characteristics. 2. Update or remove any invalid characteristic options.
Invalid characteristic options in the quantity rule.	Update or remove the invalid characteristic options in the Attribute Mappings form: 1. Click Attribute Mappings. 2. Update or remove any invalid characteristic options.
Invalid specification version in the attribute propagation rule.	Update the Source Specification field in the Attribute Propagation form to the current version.
Invalid characteristic in the attribute mapping rule.	Update or remove the invalid characteristics in the Attribute Mappings form: 1. Click Attribute Mappings. 2. Update or remove any invalid characteristics.

[End]

[store-future: BEGIN review]

Create and publish a specification version in Order Management for Telecommunications, Media, and Technology

Create and publish a version of an existing specification in a Published state so that you can offer an improved version of it to your customers in your product catalog.

Before you begin

Before you can create a version of a specification, an initial base version of the specification must exist and already be published. The information that you supply for a new version is the same as what you entered for an initial base version, but with some important differences. To learn more, see [Create and publish product specifications](#).

Role required: sn_prd_pm.product-catalog_manager

About this task

You create versions of service and resource specifications in the same manner as you do a resource specification.

Procedure

1. Navigate to **All > Product Catalog Management > Product Specifications**.
2. In the Product Specifications list, select the product specification that you want to create a version for.
3. On the form, click **Create New Version** and then fill in the fields.
The manner in which you create a version of a specification is similar to how you created its initial version, with the differences that are explained in the following table.

Product specification form

Field	Description
Name	Name of the new product specification. If the name of the item for the new version differs from the previous version, you can enter a new name. For example, if the name of the item is SD-WAN Security, override it if you want a new name for the new version.
Version	Version number that is assigned to a specification: ○ When you create the initial version, 1 appears in this field, and can't be changed. ○ When you create subsequent versions of the specification, the next incremental number appears in this field after you click Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display Name	Displayed name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect.

Field	Description
	- When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. - When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: - SD-WAN Edge Device is the name of the specification. - Version 2 is the current version of the specification.
Initial Version	Name of the base version of the specification that appears but can't be changed.
Previous Version	Name of the previous version of the specification. For example: - When you create the initial version of the specification (for example, version 1), this field is empty. - When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. - When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.

Note:

For information about the remaining field descriptions, see [Field descriptions for product catalog forms in Order Management for Telecommunications and Media](#).

4. To reflect the engineering changes that were made to the physical product, update the specification relationships, decomposition rules, quantity mappings, and attribute propagation rules as follows:
 - a. To update the characteristics and characteristic options that are associated with your specification, use the Specification Characteristics related list. To learn more, see [Create specification relationships and decomposition rules](#).
 - b. To update the specification relationships and accompanying decomposition rules, use the Specification Relationships related list. To learn more, see [Create specification relationships and decomposition rules](#).

- c. To update attribute mappings, use the Attribute Mappings related list. To learn more, see [Defining mappings for attribute value propagation to domain orders](#).
 - d. To create a product offering from the specification, navigate to the Product Offerings related
5. When you finish creating the specification version, do one of the following actions.

Note:

To learn more about the validations that are performed when you publish a new specification version, and how to resolve any reported errors, see the section about validations in [Creating and publishing new specification versions](#).

Related topics

[Product catalog data model and catalog versioning](#)

[Create and publish product specifications](#)

[Create and publish service specifications](#)

[End]

[store-future: BEGIN review]

Creating and publishing product offering versions in Order Management for Telecommunications, Media, and Technology

As a product catalog manager, you can create and publish the product offering versions that list the improved products and services that you can offer to your customers in a product catalog.

Overview

You create product offering versions for an existing product that you are improving. You typically create versions of product offerings by combining new versions of product, service, and resource specifications. Proper versioning enables your customer service agents to know what the latest versions of your product and service offerings are when they sell more expensive, complementary, upgraded, or related products to your customers.

Creating versions of product offerings

When you create a version of a product offering, do the following actions:

1. Create and assign a version number in each of the product, service, or resource specifications or product offering records that are affected by the changes. To reflect the engineering changes that were made to the physical product, edit the following data that is associated with the product offering version:
 - Characteristics
 - Characteristic options
 - Product specifications
2. Create the required specification relationships, decomposition rules, and attribute mappings for each specification in the new version. To learn more, see:
 - [Creating and publishing new specification versions](#)
 - [Create and publish a new specification version](#)
3. Create the product offering, and then publish it when you update your product catalog.
4. Retire or archive old or unused specifications, and product offerings. To learn more, see [Retiring and archiving versioned specifications and product offerings](#).

Updates and validations that are performed when you create and publish a product offering version

When you create a version for a currently published product offering, the ServiceNow AI Platform[®] copies the following data into, or populates, the new product offering record with the following data:

1. Copies the following fields with these basic product offering details:

- **Product Specification**
- **Contract Term**
- **Monthly Recurring Charges**
- **Non Recurring Charges**
- **Description**
- **Offering Catalog**
- **Distribution Channel**
- **Start and End** date
- **Product code** and **Product line**
- **Cost to Company**
- **Composite, Installation Required**, and **Location-specific** indicators

2. Populates the following fields with the detailed information that you enter for the new product offering version:

- **Version.** The next incremental number appears.
- **Display Name.** The display name is the system-assigned concatenation of the product offering name and its current version number. You can overwrite this field.
- **Initial Version.** The name of the base version of the product offering appears but can't be changed.
- **Previous Version:** The name of the product offering is as it was in the previous version.

When you publish the updated product version, additional validations are performed on your edits. To learn more, see the Updating and validating copied rules for a new specification version section in [Creating and publishing new specification versions](#).

[End]

[store-future: BEGIN review]

Create and publish a product offering version in Order Management for Telecommunications, Media, and Technology

Create and publish a version of an existing product offering in a Published state so that you can offer an improved version of it in your product catalog.

Before you begin

Before you can create a version of a product offering, an initial base version of the product offering must exist and already be published. The type of information that you supply for a new version is the same as what you entered for an initial base version, but with certain differences. To learn more, see [Create your product offerings and publish to a catalog](#).

Role required: sn_prd_pm.product-catalog_manager

Procedure

1. Navigate to **All > Product Catalog Management > Product Offering**.
2. In the Product Offerings list, select the product offering that you want to create a version for.
3. On the form, click **Create New Version**, and then fill in the fields.
The manner in which you create a version of a product offering is similar to how you created its initial version with the following exceptions.

Note:

For information about the remaining field descriptions, see [Product Offering Versions form](#)

4. To reflect the engineering changes that were made to the physical product, update the product offering version:
 - a. To update the characteristics that are associated with your product offering, use the Product Offering Characteristics related list.
 - b. To update the product visuals for your versioned product offering, use the Product Visuals related lists.

c. **Note:**

To learn more, see [Create your product offerings and publish to a catalog](#).

5. When you finish creating the product offering version, do one of the following actions.

[End]

[store-future: BEGIN review]

Retiring or archiving versioned specifications and product offerings in Order Management for Telecommunications, Media, and Technology

As a product catalog manager, you can move a published specification or a product offering to a Retired or Archived state when they are no longer in use or are being sold. When you retire a specification version, you can't use it in a product offering or create specification versions.

[End]

[store-future: BEGIN review]

Retire or archive a specification version in Order Management for Telecommunications, Media, and Technology

Move a published specification version to a Retired or Archived state when the version is no longer in use or being sold to your customers. When you retire a specification version, you can't use it in a product offering or create a specification version.

Before you begin

Role required: admin

About this task

You can maintain only one active version of the specification. When you retire or archive a specification version, you can't do the following actions:

- Update the specification version.
- Use it to create other catalog entities or rules such as product offerings, specification relationships, attribute mappings, or decomposition rules.

You retire or archive service and resource specification versions in the same manner.

Procedure

1. Navigate to **All > Product Catalog Management > Product Specifications**.
2. In the Product Specifications list, select the product specification that you want to retire or archive.
3. To view the previous versions that are related to this specification, click **Versions (n)**, where n represents the number of base and previous versions for this specification.

For detailed information about the field descriptions, see [Specification Versions form](#).

4. From the Versions (n) related list, select one or more specification versions to retire or archive:
 - a. To retire a previous specification version, select the check box next to the Number column, and then click **Retire**.
 - b. To archive a previous specification version, select the check box next to the Number column, and then click **Archive**.

5. To retire this specification version, click **Retire**.

Validations ensure that the specification version is not being used in other active specifications or product offerings. If it's being used in a published specification or product offering, the following message appears:

Retire Specifications

The following specification(s) PRDSP00005 are used in published specifications/product offerings. Are you sure you want to retire the selected specification(s)?

Do one of the following actions:

- To skip the retirement of this specification, click **No**.
- To retire this specification, click **Yes**. The following final confirmation message appears:

Retire Specification

Changes to specifications are not allowed once Retired. Are you sure you want to retire this specification?

Do one of the following actions:

- To skip the retirement of this specification, click **No**.
- To retire this specification, click **Y**. When you retire a specification, its state changes to Retired. After you retire a specification, you can't make any changes to it, use it in a product offering, or create specification versions for it.

[End]

[store-future: BEGIN review]

Retire or archive a product offering version in Order Management for Telecommunications, Media, and Technology

Move a published product offering version to a Retired or Archived state when it is no longer in use or being sold to your customers. When you retire a product offering version, you can't use it in a product catalog.

Before you begin

Role required: admin

About this task

You can maintain only one active version of the product offering. After a product offering is retired or archived, you can't do the following actions:

- Update the product offering version.
- Use it in a product catalog.

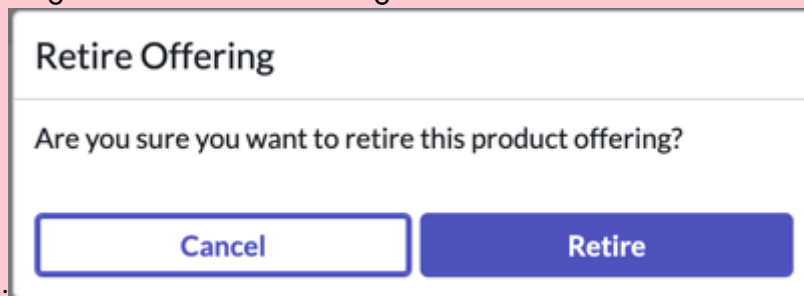
Procedure

1. Navigate to **All > Product Catalog Management > Product Offering**.
2. In the Product Offerings list, select the product offering that you want to retire or archive.
3. To view the previous versions that are related to this product offering, click **Versions (n)**, where n represents the number of base and previous product offering versions.

For detailed information about the field descriptions [Product Offering Versions form](#).

4. From the Versions (n) related list, you can select one or more product offering versions to retire or archive:
 - a. To retire a previous product offering version, select the check box next to the Number column, and then click **Retire**.
 - b. To archive a previous product offering version, select the check box next to the Number column, and then click **Retire**.
5. To retire this product offering version, click **Retire**.

The following final confirmation message



Retire Offering

Are you sure you want to retire this product offering?

appears:

Do one of the following actions:

- To skip the retirement of this product offering, click **Cancel**.
- To retire this product offering, click **Retire**.

[End]

[store-future: BEGIN review]

Create and publish a template

Create and publish a template so that you can define the 5G network services for your organization.

Before you begin

Role required:

- sn_prd_pm.product_catalog_admin
- sn_prd_pm.product_catalog_manager (Read-only access)

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. On the **Configurable Workspace Lists** tab () , select **Templates > All**.
3. Select **New**.
4. On the form, fill in the fields.

Template form

Fields	Descriptions
Number	System-generated number of the template.
Name	Name of the template.
Description	Description of the template.
State	State of the template. Draft The template is created, but not yet published in the catalog to be used in the product or service specifications. Published The template is published in the catalog and in use in the product or service specifications. Retired The template is retired and you can't make any changes to the retired template. Archived The template is archived. You can archive only a retired template.

5. Select **Save**.
6. Select the **Template Characteristics** related tab, select **New**, and fill in the fields on the form.

Template Characteristics form

Fields	Descriptions
Number	Number of the automatically filled-in template.
Characteristic	Characteristic of the network service that you're defining.
Template	Template that is automatically selected.
Mandatory	Mandatory characteristics to be confirmed by selecting the check box.

7. Select **Save**.

8. Select the **Template Characteristic Options** related tab, select **New**, and fill in the fields on the form.

Template Characteristic Options form

Fields	Descriptions
Number	Number of the automatically filled-in template characteristic.
Template characteristic	Template characteristic that you've defined.
Characteristic option	List of the characteristic options defined in the Template Characteristic table.

Note:

This Template Characteristic Option table appears in the related list of the Template Characteristic table when the characteristic is selected to Choice and the check-box is marked to yes or no.

9. Publish, update, or copy the draft template.

What to do next

Create and publish the service specifications and associate them with the templates. For more information, see [Create and publish service specifications](#).

[End]

[store-future: BEGIN review]

Retire or archive a template

Move a published slice template to a Retired or Archived state when the template is no longer in use. When you retire a template, you can't use it in a service specification.

Before you begin

Role required: sn_prd_pm.product_catalog_admin

About this task

After you retire or archive a template, you can't do the following actions:

- Update the template.
- Use it to create other template entities such as template characteristics and template characteristics options.

Procedure

1. Navigate to **All > Product Catalog Management > Templates**.

2. In the Templates list, select the template that you want to retire.

3. Open the template and select **Retire**.

A dialog box appears with the following message: Are you sure you want to retire this template? Once you retire it, you can't make changes to it.

If the template is being used in a published specification, the following message appears: Are you sure you want to retire this template? It's used in one or more published specification.

Do one of the following actions:

- To skip the retirement of this template, select **Cancel**.
- To retire this template, select **Retire**.

4. Archive this template by selecting **Archive**.

A dialog box appears with the following message: Are you sure you want to archive this template?

Do one of the following actions:

- To skip archiving this template, select **No**.
- To archive this template, select **Yes**.



Note:

You can only archive a retired template.

[End]

[store-future: BEGIN review]

Configuring order fulfillment

You can define the processes for fulfilling customer orders by using Flow Designer.

Order fulfillment, also referred to as order orchestration, defines how to coordinate the fulfillment of orders. You can define the order fulfillment processes that you require and then configure them by performing the tasks in the following table.

Task	Description
1. Configure subflows for order fulfillment	Subflows define the task flow for fulfillment agents to fulfill customer orders. You can copy a subflow from the base system and make changes for your business needs. For more information on configuring subflows, see Subflows .
2. Configure decision tables for order fulfillment.	Decision tables define the conditions for triggering the order fulfillment subflow. The Order Management for Telecommunications, Media, and Technology application uses the Order fulfillment Policy decision table. For more

Task	Description
	information on configuring decision tables, see Decision tables .
3. Configure order assignment rules to route tasks to agents, based on their skill sets.	For more information on assignment rules, see Create an assignment rule .

[End]

[store-future: BEGIN review]

Flow actions for fulfillment subflow definition in Order Management for Telecommunications, Media, and Technology

If you define your own fulfillment subflows in Flow Designer, you can use the standard flow actions that are available in the ServiceNow AI Platform. Each action deals with different aspects of the fulfillment or inventory maintenance, which can help bring some consistency in how data is retrieved and updated.

The fulfillment flows in the demo data that was shipped with the ServiceNow AI Platform use the flow actions in the following table.

Action name	Description
Create Install Base Item and Installed Product	Flow action to create and manage the install case items in the order fulfillment subflow. The flow action takes the customer order line, configuration item (CI), and sold product as input, and creates the install base item and installed product.
Update Configuration Item	Flow action that includes a prescriptive way to update the configuration items order fulfillment subflow. The flow action takes the sold product, product model ID, and comments as input, and updates the corresponding configuration item based on the install base Item.
Get Child Sold Product	Flow action that includes a prescriptive way to retrieve the sold products that are relevant to a specification in a customer order. The flow action takes the specification and the parent sold product as input and retrieves the child sold product from the respective hierarchy. Using this flow action helps with the product inventory updates that occur at the end of the fulfillment process.
Get Customer Order Characteristic Value	Flow action that takes the customer order line Item and characteristic as input and returns a characteristic value from the customer order line item. If the characteristic is not present in the customer order line item, it returns the

Action name	Description
	default value for the characteristic from the respective order line item offering.

Related topics

[Order Management data model](#)

[Flow Designer](#) ↗

[Flows](#) ↗

[Create a flow](#) ↗

[End]

[store-future: BEGIN review]

Using a request definition to manage the order task attributes

Learn how you can use a request definition while creating an order task to manage the order task attributes, such as the specifications and characteristics of an order.

Overview of order tasks and flows

By using Flow Designer, you can configure an order task, which is an extension of the ServiceNow AI Platform Task entity, while you create a flow. Next, you can use the Create Order Task action to contain the flow actions that define the behavior of your order tasks. To learn more about how to create a flow and configure an order task, see [Create a flow](#) ↗.

Using a request definition to categorize your order tasks

You can use the **Request Definition** field in the Create Order Task form to categorize or classify your order tasks. You can also add new request definitions into the Create Order Task form if you need to. Your agents close the order tasks during your order fulfillment based on the request definitions that you configure in the order task form.

Note:

You can use a request definition to create order tasks for more than one domain order, but you can't use a request definition to create multiple order tasks for a single domain order.

Configure a request definition

The screenshot displays the ServiceNow Flow Designer interface for a process named "SDWAN Fulfillment Process". The flow is composed of six sequential steps:

- Update Product Order Record
- Create Order Task (Expanded view shown below)
- Wait For Condition where (State is Closed Complete)
- Create Order Task
- Wait For Condition where (State is Closed Complete)
- Create Order Task

The expanded view of the "Create Order Task" action (Step 2) shows the following configuration:

- Action:** Create Order Task
- Request Definition (Request Definition):** Reserve Resource
- Domain Order (Product Order):** Input - Product Order
- Task Fields (Order Task):**
 - State:** In Progress
 - Priority:** Scripted (Expand to edit)
 - Short description:** Scripted (Expand to edit)
- Inflight Change Type:** Characteristic

The right-hand pane shows the "Data" section with a list of variables and their types:

- Flow Variables:**
 - Product Order: Record
- Subflow Inputs:**
 - 1 - Update Record: Record
 - Product Order Record: Record
 - Product Order Table: Table
 - Action Status: Object
 - 2 - Create Order Task: Record
 - Order Task: Record
 - Inflight Task Check: String
 - Action Status: Object
 - 3 - Wait For Condition: Choice
 - Action Status: Object
 - 4 - Create Order Task: Record
 - Order Task: Record
 - Inflight Task Check: String
 - Action Status: Object

When you create an order task, most of the order information is captured by the common attributes in the order task. If your order fulfillment agent has to provide specification characteristics options from the customer order, the request definition helps you to associate the required specification characteristics with the order task.

To capture this order information, you must configure the characteristic options under the request definition fields in your order task form. For more information on request definitions, see [Creating a request definition](#).

[End]

[store-future: BEGIN review]

Creating a request definition

Create a request definition and configure it into an order task in Order Management for Telecommunications, Media, and Technology to help your agents provide additional order attributes for the order fulfillment.

Before you begin

Role required: sn_prd_pm.product-catalog_admin

Procedure

1. In the application navigator, enter [sn_ind_request_definition.LIST] and then press the **Enter** key.
2. Modify an existing request definition or create a request definition.
 - To modify an existing request definition, in the ID column of the Remote Request Definitions list, click a request definition.
 - To create a request definition, in the Remote Request Definitions list, click **New**.
3. On the form, fill in the fields.

Remote Request Definition form

Field	Description
ID	Unique identifier for the request definition. Note: You can't modify an ID after the request definition is created.
Task type	Task table that is associated with the service request. Note: You can create new order tasks only in the Order Task [sn_ind_tmt_orm_order_task] table.
Name	Name to identify the request definition.
Task Fields	Fields of the Task table.

4. Save the remote request definition settings.

- To save a new request definition, click **Submit**.
- To save the changes to an existing request definition, click **Update**.

5. On the Request Definition form, change the Default view to ORM Request Definition and fill in the fields to create a Request Definition characteristic.

Request Definition characteristic form

Field	Description
Specification	Name of the product specification.
Characteristic	Name of the product characteristic that you want to capture the information from the customer order.
UI Visible	Option that designates if the UI Visible field appears as true in the Request Definition characteristics table and the characteristic appears in the Order Task form. If you clear the check box, the field value appears as false, and the characteristic doesn't appear in the order task form.
Mandatory	Option that designates if the Mandatory field appears as true in the Request Definition characteristics table. Your agent must provide the characteristic value in the order task form to close the order task. If you clear the check box, the field value appears as false and your agent can close the task without providing any characteristic value in the order task form.
Read-only	Option that designates if the Read-only field appears as true in the Request Definition characteristics table, and you can't edit the characteristic value in the order task form. If you clear the check box, the field value appears as false in the Request Definition characteristics table and you can edit the characteristic value in the order task form.

6. Click **Submit**.

[End]

[store-future: BEGIN review]

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**.

[End]

[store-future: BEGIN review]

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.

[End]

[store-future: BEGIN review]

Configuring order enrichment flows using Decision Tables

Associate enrichment subflows with the product or service specifications by using the Order Enrichment Flow Policy in Decision Tables.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Decision Builder**.
2. Select the **Order Enrichment Flow Policy** decision table.
3. In the **Specification** column of the conditions section, select the order line item to set a condition.
4. Select the product offering in the **Offering** column.

Result

A list of subflows appear in the results section. These sub flows create the enrichment tasks for an order line item during the enrichment process. For more information, see [Decision Builder](#) .

[End]

[store-future: BEGIN review]

Configuring Jeopardy Management

You can configure Jeopardy Management to monitor tasks in a fulfillment plan and alert managers about the jeopardy levels.

There are several steps to set up Jeopardy Management in Order Management. For more information about each step and how to accomplish them, see the Jeopardy Management setup table.

Jeopardy Management configuration activities



Define subflows for product offerings which create order tasks upfront and define task relationships.



Enable the Jeopardy Management to activate options for current specifications.



Create SLA definitions based on request type, specify proper start/end conditions to monitor order task progression.



Set up decision tables to retrieve jeopardy level information and order task expected duration.

Jeopardy Management setup

Configuration Actions	Description
Define Jeopardy-enabled fulfillment workflows	Define subflows for product and service specifications using the following Jeopardy-specific Flow Designer actions: • Create Order Planned Task • All Place Holder Tasks Created for Domain Order • Set Task Relationships • All Relationships Created for Order Tasks on Domain Order • Set Order Task State All tasks are created in a Draft state.
Configure the Order Jeopardy Enablement Policy	Enable Jeopardy Management for product and service using the Order Jeopardy Enablement Policy in Decision Builder. Note: Enable Jeopardy Management for all fulfillment flows within an order or specification.
Create Service Level Agreement (SLA) definitions in Jeopardy Management	Define service level agreements (SLA) based on request type and specify the proper start and end conditions to monitor order task progression.
Configuring Jeopardy Management	Set up decision policy tables to retrieve jeopardy information. Policy tables include: • Configure Order Task Assignment Policy • Configure Order Line Jeopardy Level Calculation Policy • Configure Order Task Jeopardy Level Calculation Policy

Additional attributes in Jeopardy Management

The following section contains additional information about Jeopardy Management:

- Is Jeopardy Management domain separated? Yes.
- How does Jeopardy Management interact with domain separation? Tables are domain separated.
- Does Jeopardy Management introduce new roles or access control list (ACL)? Yes, read access for the Task SLA table (task_sla) is granted to the following roles:
 - sn_ind_tmt_orm.service_order_agent
 - sn_ind_tmt_orm.order_fulfilment_agent

Demo data

If you have a Telecommunications subscription, the following fulfillment subflows are included with the demo data for Order Management for Telecommunications and Media :

- Ethernet Edge Device Fulfillment
- Ethernet Modem Fulfillment
- Change Ethernet Edge Device
- Disconnect Ethernet Edge Device
- Disconnect Ethernet Modem
- Network Interface Profile Fulfillment
- Change Network Interface Profile
- Disconnect Network Interface Profile
- EVC Configuration Fulfillment
- Disconnect EVC Configuration Service

[End]

[store-future: BEGIN review]

Define Jeopardy-enabled fulfillment workflows

Create jeopardy-enabled fulfillment workflows using Flow Designer. The workflows enable Jeopardy Management to track task completion times and manage risk.

Before you begin

Role required: admin

About this task

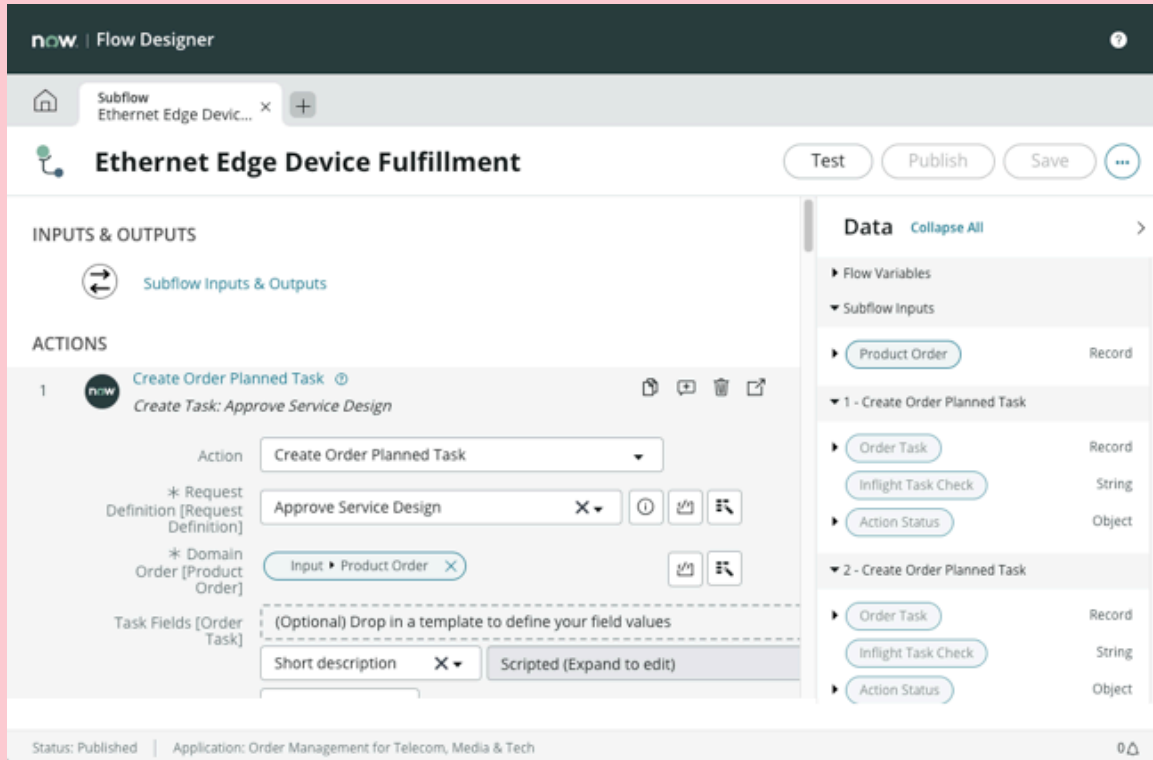
Creating fulfillment flows starts with defining subflows in Flow Designer using unique actions developed for Jeopardy Management.

The following Flow Designer actions are used to create Jeopardy Management flows:

- Create Order Planned Task
- All Place Holder Tasks Created for Domain Order
- Set Task Relationships
- All Relationships Created for Order Tasks on Domain Order
- Set Order Task State

Procedure

1. Navigate to **All > Flow Designer**.
Flow Designer opens in a separate window.
2. Select **Subflows** and do one of the following:
 - Search for existing subflows that you want to edit.
 - Start a new flow by selecting **New > Subflow**.
3. Give the subflow a name and provide any additional information.
4. Select the **Create Order Planned Task** action.



5. Build the Jeopardy Management subflow using the following actions:

Jeopardy Management flow actions

Order flow action	Definition
Create Order Planned Task	The Create Order Planned Task action extends planned tasks to Jeopardy Management.
All Placeholder Tasks Created for Domain Order	The All Placeholder Task Created for Domain Order Policy sets the domain order stage to all order tasks created. Order tasks created by other subflows have relationships created with domain orders.
Set Task Relationship	The Set Task Relationship action sets the relationship between two order tasks by creating a record in the planned_task_rel_planned_task table. The table calculates the order line item runtime and the order task jeopardy calculations.
All Relationships Created for Order Tasks on Domain Orders	The All Relationships Created for Order Tasks action introduces the domain order all_relationship_set and sets

Order flow action	Definition
Set Task Order State	the field to true in the subflow when all task relationships are established. The flow action checks if an order task has a previous state value and uses the previous state to update the order task state during inflight state change. The Set the Order Task State action checks to see if an order task has a previous state value and uses the previous state to update the order task state during inflight state changes.

Note:

For more information about building subflows, see [. \[2\]](#)

6. Test the flow by selecting **Test**.

7. Publish the flow by selecting **Publish**.

What to do next

The next step to configure Jeopardy Management is to configure the Order Task Duration Assignments Policy. See [Configure the Order Task Duration Assignment Policy](#) for more information.

[End]

[store-future: BEGIN review]

Configure the Order Task Duration Assignment Policy

Configure the Order Task Duration Assignment Policy using Decision Builder in Order Management for Telecommunications and Media as part of configuring Jeopardy Management.

Before you begin

Role required: admin

About this task

This procedure uses Decision Builder to assign an amount of time to complete order tasks and is part of configuring Jeopardy Management.

Procedure

1. Navigate to **All > Decision Builder**.

2. Select **Order Task Duration Assignment Policy**.

now

Decision Builder

Order Task Duration Assignment Policy

Created: 2023-03-28 14:39:50

Application: Order Management for Telecom, Media & Tech

Properties

Close

Save

Inputs

Add

Label	Type	Reference	Mandatory
Order task	Reference	Order Task [sn_ind_tmt_orm_order_task]	☒
Add an input			

Decision table

Export

Import

History

Conditions			Results
	Request type Order task (Order Task ▶ Request type)	Order task account Order task (Order Task ▶ Order line I...	Duration
1	Approve Service Design	Funco Intl	0.1
2	Ship CPE	Funco Intl	24
3	Prepare and Build EVC Configuration	Funco Intl	0.1
4	Prepare and Build Network Interface Profile	Funco Intl	6
5	Create Interface Profile	Funco Intl	2
6	Assign Interface Profile to UNI	Funco Intl	3

3. On the Order Task Duration Assignment Policy table, fill in the fields.

Order Task Duration Assignment Policy fields

Field	Description
Request type	Select an order task to add a duration time.
Order task account	Add the order task account associated with the task.
Duration	Fill in the allotted time for this task. Durations are based on a 24-hour clock, with whole numbers equal to the amount of time in hours. Minutes are represented with a decimal point. For example: 20 hours = 20 30 minutes = 0.5 6 minutes = 0.1 Note: The allotted time for order tasks must be the same as the allotted time in the SLA definition assigned to the order task. See Create Service Level Agreement (SLA) definitions in Jeopardy Management for more information.

4. Select **Save**.

What to do next

The next step is to configure SLA definitions for Jeopardy Management. See [Create Service Level Agreement \(SLA\) definitions in Jeopardy Management](#) for more information.

[End]

[store-future: BEGIN review]

Create Service Level Agreement (SLA) definitions in Jeopardy Management

Create and link Service Level Agreements (SLAs) to tasks in a fulfillment workflow as part of configuring Jeopardy Management. SLAs are assigned to tasks and define the amount of time a task should take. After SLAs are linked to a task, the SLA monitors the task and the fulfillment process.

Before you begin

Role required: admin

About this task

Creating SLA definitions are a part of configuring Jeopardy Management. SLAs are linked to tasks in a fulfillment plan. The SLA tracks of the time that a task takes to complete. If the task takes longer than the SLA definition, jeopardy alerts are created. Fulfillment managers can monitor the jeopardy levels and be alerted when tasks are falling into jeopardy. Defining SLAs involves the following steps:

- Define SLA for an order task.
- Set the expected duration for the task.
- Define when to start, stop, and pause the SLA clock.

Procedure

1. Navigate to **All > SLA Definitions**.
2. Select **New**.
3. On the SLA Definition form, Fill in the fields in the SLA Definitions form.

SLA Definition form

Field	Description
Name	Name that identifies the SLA definition.
Type	Select SLA as the type of agreement.
Target	Select Resolution .
Table	Select the Order Task (sn_ind_tmt_ord_order_task) table.
Flow	Select the SLA processing flow for Order Task flow or a create custom flow that is extended from the base system version to perform the jeopardy calculations.
Enable logging	Activates debug logging. The debug logging information includes details of the conditions that have matched or not matched. The information also provides the before and the after values for the task SLA and task records.
Duration type	Select User specified duration .

Field	Description
Duration	Enter a task duration time. The duration time must match Order Task Duration Assignment Policy. <i>i</i> Note: Jeopardy Management only supports 24x7 durations.
Schedule source	Select SLA definition .
Schedule	Select 24 x 7 as the schedule.
Timezone Source	Select The SLA definition's timezone .
Tabs	
Start condition	Define the starting conditions in which the SLA parameters are started.
Pause condition	Define the conditions under which the SLA suspends the elapsed time. <i>i</i> Note: The Start and Suspend conditions in the SLA definition must match the same conditions in the Order Task Duration Assignment Policy. For more information, see Configure the Order Task Duration Assignment Policy.
Stop condition	Define the conditions under which the SLA is completed. If all these conditions match, then the task SLA is completed regardless of whether it's breached.
Reset condition	Determines whether the existing task is canceled or completed on task SLA reset. Defines the conditions under which the running SLA is canceled or completed and a new SLA is attached. For a new SLA to be attached, the start condition must match. Reset condition also helps to configure SLAs when the value of any field on the task record changes, changes to, or changes from a value.

4. Select **Submit**.

What to do next

The next area to configure in Jeopardy Management is the decision tables. Use the following link: [Configure the Order Line Jeopardy Level Calculation Policy](#)

[End]

[store-future: BEGIN review]

Configure the Order Line Jeopardy Level Calculation Policy

Configure the **Order Line Jeopardy Calculation Policy** using Decision Builder in Order Management as a part of configuring Jeopardy Management.

Before you begin

Role required: admin

About this task

This procedure uses Decision Builder to set the jeopardy risk level for order line items. You must provide a time range for each jeopardy level. When the time range is reached, the linked jeopardy alert level is displayed.

Procedure

1. Navigate to **All > Decision Tables**.

2. Select **Order Line Item Jeopardy Level Calculation Policy**.

The screenshot shows the ServiceNow Decision Builder interface for the 'Order Line Item Jeopardy Level Calculation Policy'. The interface includes a header with the title, creation date (2023-05-11 14:51:21), and application context (Order Management for Telecom, Media & Tech). Below the header, there are sections for 'Inputs' and 'Decision table'.

Inputs:

Label	Type	Reference	Mandatory
Order Line Item	Reference	Order Line Item [sn_ind_tmt_orm_order_line_item]	☒
Delayed Percentage	Decimal		☒

Decision table:

Conditions			Results
	Delayed Percentage		Jeopardy Level
	Min	Max	
1	less than 10		Low
2	10	25	Medium
3	25	50	High
4	greater than 50		Critical

3. On the Order Line Item Jeopardy Level Calculation Policy table, fill in the fields.

Order Line Item Jeopardy Level Calculation Policy

Field	Description
Delayed Percentage	Set the minimum and maximum delayed percentage for the order line item (OLI).
Order Line Items (OLI) Specification	Select the order line item to attach to the Delayed Percentage .
Jeopardy Level	Set the jeopardy level for the values indicated in the Delayed Percentage field. In the example: - Less than 10% delayed percentage = the lowest jeopardy level. 10–25% completion, Jeopardy level moves to a medium alert.

Field	Description
	For example, if the minimum and maximum values in the Delayed Percentage field are 5% and 10% respectively, you can assign that value range a Low Jeopardy Level.

4. Select **Save**.

What to do next

[Configure the Order Task Jeopardy Level Calculation Policy.](#)

[End]

[store-future: BEGIN review]

Configure the Order Task Jeopardy Level Calculation Policy

Configure the Order Task Jeopardy Level Calculation Policy using Decision Builder in Order Management as a part of configuring Jeopardy Management.

Before you begin

Role required: admin

About this task

This procedure uses Decision Builder to set the risk levels for the minimum and maximum Service Level Agreement (SLA) percentage completion for order tasks.

Procedure

1. Navigate to **All > Decision Builder**.
2. Select **Order Task Jeopardy Level Calculation Policy**.

The screenshot displays the ServiceNow Decision Builder interface for the 'Order Task Jeopardy Level Calculation Policy'. The top bar shows the application name and a 'Created' timestamp. Below the title bar, there are tabs for 'Inputs', 'Decision table', and 'Results'. The 'Inputs' section lists two inputs: 'Order task' (Reference type) and 'Percentage complete' (Decimal type). The 'Decision table' section shows a table with four conditions and their corresponding results. The 'Results' section shows the 'Jeopardy level' output.

Inputs		Decision table		Results
Label	Type	Reference	Mandatory	
Order task	Reference	Order Task [sn_ind_tmt_orm_order_task]	☒	
Percentage complete	Decimal		☒	

Conditions				Results	
	Min	Max	Order task request ty...	Order line item account	Jeopardy level
1	0	60	Approve Service Design	Funco Intl	Medium
2	0	60	is not "Approve Service Design"	Funco Intl	Low
3	0	60	Approve Service Design	is not "Funco Intl"	Low
4	0	60	is not "Approve Service Design"	is not "Funco Intl"	None

3. On the Order Task Jeopardy Level Calculation Policy table, fill in the fields.

Order Task Jeopardy Level Calculation Policy

Field	Description
SLA progression	Set the minimum and maximum percentage for the order task.

Field	Description
Order task request type	Select the order task request type. A request task is part of a jeopardy-enabled workflow.
Order line item account	Select the order line item account. The account is linked with the order and order line item.
Jeopardy level	Assign the jeopardy level to associate with the SLA progression percentage minimum and maximum values.

4. Select **Save**.

What to do next

[Configure the Order Jeopardy Enablement Policy.](#)

[End]

[store-future: BEGIN review]

Configure the Order Jeopardy Enablement Policy

Add Jeopardy Management workflows to product and service specifications using the **Order Jeopardy Enablement Policy** in Decision Builder.

Before you begin

Role required: admin

About this task

Use Decision Builder to define which product, service, or resource specification is jeopardy-enabled.

Procedure

1. Navigate to **All > Decision Tables**.
Decision Builder opens in a separate window.
2. Select **Order Jeopardy Enablement Policy**.
3. In the **Conditions** column under the **Specification** section, select a product or service specification to link to Jeopardy Management.

4. In the **Results** column, change the **Jeopardy Enabled** field to

The screenshot shows the ServiceNow Decision Builder interface for the 'Order Jeopardy Enablement Policy'. The 'Inputs' section includes a 'Specification' input. The 'Decision table' section is active, showing a table with 'Conditions' and 'Results' columns. The 'Results' column is being edited to set 'Jeopardy Enabled' to 'true' for all conditions.

Conditions	Results
Specification (Specification Category)	Jeopardy Enabled
1 Ethernet Edge Device	true
2 Network Interface Profile Service	true
3 EVC Configuration Service	true
4 Modem	true

True.

Note:

Entries in this decision table are for top-level product or service specifications. In a single order, customers can purchase multiple top-level products or services. However, if any one of the products or services isn't jeopardy-enabled, the entire order is treated as a non-jeopardy-enabled order.

5. Select **Save**.

The product specification workflow is jeopardy-enabled. Jeopardy logic begins when the specification workflow starts.

What to do next

After configuring Jeopardy Management, see [Monitoring Jeopardy Management](#) to review different ways to monitor Jeopardy Management.

[End]

[store-future: BEGIN review]

Configuring Fallout Management in Order Management for Telecommunications, Media, and Technology

As a provider, you can use Fallout Management to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

The fallout type is a category that indicates the type of fallout activity. Billing Issue, Inventory Allocation Failure, and Provisioning Failure fallout types are standard in the ServiceNow AI Platform. You can define additional ones, as per the requirements of your enterprise. To learn more about managing order task fallout, see [Managing order fallout](#).

[End]

[store-future: BEGIN review]

Create additional fallout types for Order Management for Telecommunications, Media, and Technology

Define your own enterprise-specific fallout types to identify, resolve, and investigate order processing issues so that they can continue processing through to completion.

Before you begin

Role required: admin

About this task

The fallout type is a category that indicates the type of fallout activity. Billing Issue, Inventory Allocation Failure, and Provisioning Failure fallout types are standard in the ServiceNow AI Platform. You can define additional ones, as per the requirements of your enterprise. To learn more about managing order task fallout, see [Managing order fallout](#).

Procedure

1. In the application navigator, enter `/sn_fallout_mgmt_fallout_type.list`.
2. Click **New**.
3. In the **Name** field, enter the name of the inflight change type.
4. Click **Submit**.

[End]

[store-future: BEGIN review]

Configuring Inflight Change Order Management in Order Management for Telecommunications, Media, and Technology

You can use Inflight Change Order Management with the Order Management for Telecommunications, Media, and Technology application to manage the receipt of changes for customer or service orders that are still in the process of being orchestrated and fulfilled.

Inflight Change Order Management enables you to designate when you permit such changes, assesses the impact of the requested changes for an order, and automatically generates a compensation plan for them. To learn more about changing or canceling inflight orders, see [Managing inflight order changes and cancellation requests](#).

Note:

Characteristic, Contact, Quantity, or Price inflight revision types are standard in the ServiceNow AI Platform but you can define additional ones as per the requirements of your enterprise. To learn more, see the "Types of Inflight order changes" section in the [Managing inflight order changes and cancellation requests](#).

[End]

[store-future: BEGIN review]

Create additional inflight order change types for Order Management for Telecommunications, Media, and Technology

Define your own enterprise-specific inflight order change types that are used to categorize revisions or requests for cancellations, product orders, service orders, and their related line items.

Before you begin

Role required: admin

Procedure

1. In the application navigator, enter `sn_ind_tmt_orm_inflight_change_type.list`.
2. Click **New**.
3. In the **Name** field, enter the name of the inflight order change type.
4. Click **Submit**.

[End]

[store-future: BEGIN review]

Configuring order tasks to respond to inflight revision and cancellation requests

You can use Flow Designer to configure your order task records to respond to inflight order changes and cancellation requests.

Overview

The Create Order Task action contains flow actions that you use to define the order tasks for the inflight order revision and cancellation process.

To learn more about creating a flow and inflight order change processing, see:

- [Create a flow](#) 
- [Managing inflight order changes and cancellation requests](#)

[store-future: BEGIN review]To see a sample Create Flow action, see the sample Change Cisco Firepower Monitoring system flow, in your demo data, which is installed with the ServiceNow AI Platform.[End]

When you define a Create Order Task action, you can use the standard flow actions that are available in the ServiceNow AI Platform. See the following table for a list of these standard flow actions.

Create Order Task flow action fields

Create Order Task flow action field	Description
Inflight Change Type	Flow action to configure the order task to respond to the corresponding change type. You can select one of the following: Contact The order task responds to changes made to contact information on an existing order line item. Price The order task responds to changes made to pricing information on an existing order line item. Quantity The order task responds to changes made to quantity

Create Order Task flow action fields (continued)

Create Order Task flow action field	Description
	information on an existing order line item. Characteristics The order task responds to changes made to characteristics information on an existing order line item. Related items The order task responds to changes made to related items information on an existing order line item. If the task is not related to any inflight change type, you can leave it empty. Note: To learn more, see the "Types of Inflight order changes" section in the Managing inflight order changes and cancellation requests.
Inflight Change Option	Flow action to define if the order task is related in any characteristic changes, or only to a few characteristic changes from the corresponding request definition. You can select one of the following: Not Applicable The order task should not respond to any characteristic changes made to the order. Characteristics From Request Definition The order task should respond to the specific set of characteristics that you define in the Request Definition Characteristic [sn_ind_tmt_orm_req_def_char] table. These records contain the mappings of the order tasks to specific sets of characteristics. Any Characteristics The order task should respond to any revisions made to the order line item characteristics that are available in the customer or service order.

Create Order Task flow action fields (continued)

Create Order Task flow action field	Description
Inflight Task Fields (Order Task)	Flow action to attach scripting that designates what redo actions, or field updates, if any, should take place in the order task. It is applied for revisions or cancellation requests for inflight orders that contain the inflight change types and options that are defined in the Inflight Change Type and Inflight Change Option.
Cancel Task Fields (Order Task)	Flow action to attach scripting that designates what undo actions, or cancellations, if any, should take place in the order task. It is applied for revisions or cancellation requests for inflight orders that contain the inflight change types and options that are defined in the Inflight Change Type and Inflight Change Option flow actions.

Related topics

[Flow Designer](#) 

[Flows](#) 

[End]

[store-future: BEGIN review]

Configuring compatibility rules

As a provider, you can use compatibility rules to establish horizontal relationships between the specifications of multiple products, services, or resources.

You use a compatibility rule to define a source specification and a target specification and to establish a relationship between them.

The ServiceNow AI Platform provides two types of relationships that you can use to define a compatibility rule:

1. **Requires:** The source specification requires the defined target specification.
2. **Excludes:** The source specification excludes the defined target specification.

While you're creating a compatibility rule, you can establish the horizontal relationship either by defining the specifications or by defining the details for the specification characteristics. You can also define the maximum and minimum quantity of the specifications to support and fulfill your customer orders as per the defined decomposition rules.

Before you can capture a new customer order that has a horizontal relationship, you must configure the compatibility rules by defining the source and target specifications. To learn more, see:

- [Create a compatibility rule](#)
- [Define the source specifications in the compatibility rules](#)
- [Create compatible records in compatibility rules](#)

[End]

[store-future: BEGIN review]

Create a compatibility rule

Create a compatibility rule in the product catalog to define the horizontal relationships between your product, service, and resource specifications.

Before you begin

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm_adv.catalog_creator

Procedure

1. Navigate to **All > Product Catalog Management > Compatibility Rule**.
2. On the form, click **New**, and then fill in the fields.

Compatibility Rule form

Field	Description
Name	Name of the compatibility rule.
Specification	Name of the product, service, or resource specification that you want to create a compatibility rule for.
State	State of the compatibility rule: Draft (Default) Unpublished draft compatibility rule that is created when you fill in the fields and submit the compatibility rule record. Published Published compatibility rule that is created when you formally publish it after defining the source and target specifications for a product, service, or resource. Note: Only published compatibility rules are considered for the order capture and fulfillment process. Archived Compatibility rule that is no longer used in the product catalog.
Description	Description for the compatibility rule.

3. Click **Submit**.

What to do next

Define the source specifications in the compatibility rules and [Create compatible records in compatibility rules](#).

[End]

[store-future: BEGIN review]

Define the source specifications in the compatibility rules

Define a source specification in a compatibility rule so that you can create a horizontal relationship in your product catalog.

Before you begin

Ensure that you have created a compatibility rule. To learn more, see [Create a compatibility rule](#).

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm_adv.catalog_creator

About this task

A source specification record includes the details of a source product inventory item in the compatibility rule. After you create a compatibility rule, you can configure the characteristics of your source specification.

Procedure

1. Navigate to **All > Product Catalog Management > Compatibility Rule**.
2. In the Compatibility Rules list, select the compatibility rule that you want to define the source specification for.
3. On the form, click the Source Configuration related list.
4. Click **New** and fill in the fields.

Specification Configuration form

Field	Description
Specification	Based on the specification that you selected when you created the compatibility rule, this field auto-populates with your product, service, or resource specification.
Characteristic	Characteristic to define the source specification in the compatibility rule. Select the characteristic that is associated with the product, service, or resource specification.
Characteristic Option	Characteristic option to define the source specification in the compatibility rule. Select the characteristic options that are associated with the product, service, or resource specification.

5. Click **Submit**.

What to do next

[Create compatible records in compatibility rules](#).

[End]

[store-future: BEGIN review]

Create compatible records in compatibility rules

Create a compatible record in a compatibility rule so that you can define a target specification to establish the horizontal relationship with.

Before you begin

Create a compatibility rule. To learn more, see [Create a compatibility rule](#).

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm_adv.catalog_creator

About this task

A compatibility record enables you to define the target specification for creating a horizontal relationship with the source specification.

Procedure

1. Navigate to **All > Product Catalog Management > Compatibility Rule**.
2. In the Compatibility Rules list, select the compatibility rule that you want to create a compatible record for.
3. On the form, click the Compatible related list.
4. Click **New** and fill in the fields.

Compatibles New Record form

Field	Description
Name	Name of the compatible.
Specification	Product, service, or resource specification with which you want to establish a horizontal relationship for the source specification.
Relationship Type	Relationship type of the compatibility rule: Requires The source specification requires the defined target specification in the compatible record. Excludes The source specification doesn't require the defined target specification in the compatible record.
Min Quantity	Minimum number of the target specifications that you want to define in the compatible record.
Max Quantity	Maximum number of the target specifications that you want to define in the compatible record.

Field	Description
Description	Description for the compatible specification.

5. Click **Submit**.

What to do next

Define target specifications in your compatible records.

[End]

[store-future: BEGIN review]

Define target specifications in your compatible records

Define a target specification in a compatible record to establish the horizontal relationship.

Before you begin

Create a compatible record. To learn more, see [Create compatible records in compatibility rules](#).

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm_adv.catalog_creator

About this task

A target specification record includes the details of a product inventory item in the compatibility rule. After you create a compatible record, you can configure the characteristics of your target specification.

Procedure

1. Navigate to **All > Product Catalog Management > Compatibility Rule**.
2. In the Compatibility Rules list, select the compatibility rule that you want to define the target specification for.
3. In the Compatibles related list, select the compatible record that you want to define the target specifications in.
4. In the Target Configuration related table, click **New** and fill in the fields.

Specification Configuration form

Field	Description
Specification	Based on the specification that you selected when you were creating the compatible record, this field auto-populates with your product, service, or resource specification.
Characteristic	Characteristic to define the target specification in the compatible record. Select the characteristic that is associated with the product, service, or resource specification.
Characteristic Option	Characteristic option to define the target specification in the compatible record. Select the characteristic options that are associated with the product, service, or resource specification.

5. In the Compatibility Rules list, select the compatibility rule that you created.

6. Click **Publish**.

Result

A compatibility rule is created on your instance. You can now verify the horizontal relationship between the source and target specifications by validating the order related items. To learn more, see [Validate the related items of a customer order for its compatibility](#).

[End]

[store-future: BEGIN review]

Validating your orders through asynchronous order processing

You can validate your orders before the order records are created in the customer order table during asynchronous order processing in the ServiceNow® Order Management application.

You configure two system properties to validate your orders in asynchronous order processing. The *create_product_order_validations_async* system property for product orders and the *create_service_order_validations_async* system property for service orders control the validation in the asynchronous processing of orders before the orders are inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. The default values of these properties are set to True.

By default, when a scheduled job picks up the record from the Inbound Queue [sn_tmt_core_inbound_queue] table, no validation occurs and the order and the order line items are created.

To enable validation through a scheduled job, you can override the *enableValidationViaScheduleJob* property to return true. By default, this method returns false.

The following table lists all the system properties that are required for validation.

System properties for validation

Name	Description
sn_ind_tmt_orm.create_product_order_validation_async	Enable or disable the validations before inserting the product order records into the Inbound Queue [sn_tmt_core_inbound_queue] table.
sn_ind_tmt_orm.create_product_order_validation_async	Enable or disable the validations before inserting the product order records into the Customer Order [sn_ind_tmt_orm_order] table.
sn_ind_tmt_orm.create_service_order_validation_async	Enable or disable the validations before inserting the service order records into the Inbound Queue [sn_tmt_core_inbound_queue] table.
sn_ind_tmt_orm.create_service_order_validation_async	Enable or disable the validations before inserting the service order records into the Customer Order [sn_ind_tmt_orm_order] table.
sn_ind_tmt_orm.glide.mutex.script.maxspins	Maximum number of times for a thread to try to acquire a lock. The default value is 100.

System properties for validation (continued)

Name	Description
sn_ind_tmt_orm.glide.mutex.script.spinwait	Time to wait between lock attempts, in ms. The default value is 100 ms.
sn_ind_tmt_orm.limit	Number of records (batch size) to return from the inbound queue [sn_tmt_core_inbound_queue] table for processing. The default value is 100.
sn_ind_tmt_orm.schedule.max.runtime	Maximum time up to which the scheduled job runs, in ms. The default value is 900000 ms.

[End]

[store-future: BEGIN review]

Create your order entries during the asynchronous order processing

Create order entries during the asynchronous order processing in the Order Management application so that you can process the large number of orders.

Before you begin

Role required: admin

About this task

Before you can create the order entries in the customer order table, all these records are staged in the Inbound Queue [sn_tmt_core_inbound_queue] table. This table helps you to store and manage your order requests during the asynchronous processing of orders.

Procedure

1. Navigate to **All > Inbound Queue > Inbound Requests** or navigate to **Workspace > CSM Configurable Workspace > Inbound Queue Requests > All**.
2. Select the order record that you want to view.
3. On the form, fill in the fields.

Order Record form

Field	Description
Record ID	System-generated ID of the target table.
State	State of the record in the Inbound Queue. New The order records are created. In Progress When the scheduler picks the orders and generates a system ID. Completed The scheduler has successfully created the customer order record from the Inbound Queue table.

Field	Description
	Error If the scheduler doesn't successfully create the customer order record.
External ID	External ID of the order from the Configure, Price, and Quote (CPQ) system.
Status Code	HTTP status codes. If the target record is created successfully, it displays 2xx or 4xx. 201 If the target record is successfully created. 202 If the record in the Inbound Queue table is successfully created. 400 If the target record isn't created due to any error.
Resource	Information about which caller created the record in the inbound queue table.
Error message	Error message that is returned for an exception.
Payload	Payload that was received via an API.
System ID	Cluster node ID.
Reference table	Name of the target table.

4. Select **Submit**.

[End]

[store-future: BEGIN review]

Run a scheduled job to create a customer order

Run a scheduled job in the Order Management application to create a customer order from the Inbound Queue [sn_tmt_core_inbound_queue] table.

Before you begin

Role required: admin

About this task

This scheduled job runs on all the active nodes of a ServiceNow instance. This schedule job picks up the order records in batches (the batch size that you have set) from the Inbound Queue table. These order records are in the New state.

Note:

If you can't create an order due to an error, the state of the record in the Inbound Queue table is changed to an error, and an error message is displayed.

An email notification is triggered when the state of a record in the Inbound Queue table changes to an error. The notification is sent to all Order Fulfiller Demo Group users.

You can also use the Create Order UI action on the Inbound Queue table to create orders on demand.

Procedure

1. Navigate to **All > System Scheduler > Scheduled Jobs > Today's Scheduled Jobs**.
2. Select the **Create records from Inbound Queue table async** scheduled job.
3. On the form, fill in the fields.

Scheduler Job form

Field	Description
Name	Name of the scheduled job.
Job ID	RunScriptJob
Next action	Time of the next job action.
State	State of the scheduler job.
System ID	Active nodes of the ServiceNow instance.
Job context	Context of the scheduled job.
Trigger type	Type that is repeated (by default).
Repeat	Details of the time interval.

4. Select **Submit**.

Result

Customer order records are created.

[End]

[store-future: BEGIN review]

Configuring order priority and routing

As a provider, you can configure various parameters to prioritize and route orders to ensure that they are fulfilled on time.

Use order prioritization to:

- Define prioritization rules using various customer, products, service, and order attributes.
- Assign order priority while creating orders based on the pre-defined rules.
- Identify urgent orders that need to be fulfilled immediately.
- Automatically route high priority orders to a specific fulfiller group.
- Ensure that orders are fulfilled within a committed date.
- Recalculate order priority when any changes occur.

In Order Management, the order priority is calculated using pre-defined rules based on the following categories of data.

Category	Input
Customer	Customer account
Specification	• Product specification • Service specification • Product offering
Order type	Order line item
Urgency	Order line item

Note:

The inputs used in these decision tables and the rank can be modified according to your business requirements.

These rules are defined in the following decision tables:

- Order Priority Policy by Customer Attributes
- Order Priority Policy by Order Type
- Order Priority Policy by Specification Attributes
- Order Priority Policy by Urgency

Each parameter defined in the decision table has a rank value assigned to it. When an order is created, the decision tables are evaluated and a weightage is assigned to each table to calculate the order priority. See [Calculating the order priority](#) on how the priority is calculated.

Note:

You can add new inputs, conditions, or modify the existing conditions in the decision tables. For more details on updating decision tables, see [Using Decision Builder](#).

[End]

[store-future: BEGIN review]

Calculating the order priority

Order priority is calculated based on the rank defined in the decision table and the weightage assigned to each table.

The rank and weightage can be a number between 0 to 100 and priority levels are defined as follows:

- Critical: 80 - 100
- High: 60 - 80
- Medium: 40 - 60
- Low: <40

Note:

Depending on your business requirements, you can modify the order priority by editing the rank and weightage in the *sn_ind_tmt_orm.PriorityManagement* extension script. This extension point script is used to manage priority ranks from decision tables for order line items. Any changes made in the script will override the rank and rank and weightage defined in the decision tables.

Priority is calculated as follows:

$$\text{sum of (rank * weight) / sum of weight}$$

For example, if the rank and weight for each decision table is defined as follows:

Decision table	Rank	Weight
Customer	100	10
Specification	80	25
Order type	80	35
Urgency	60	30

In this example, priority is calculated as:

$$\text{Priority} = (100 * 10 + 80 * 25 + 80 * 35 + 60 * 30) / (10 + 25 + 35 + 30) = (7600) / 100 = 76$$

The order priority is set to **high** in the customer order and in the order line items.

Note:

The highest priority specified for the order line items is used to set the priority for the customer order. The order line item priority is then propagated to the corresponding domain orders and order tasks.

Adding a new priority rule

Apart from the rules defined in the decision tables provided with the base system (see [Configuring order priority and routing](#)), you can create additional decision tables and a new extension point implementation to add new priority rules. To create a new priority rule, follow these steps:

1. Navigate to **All > Decision tables** and click **New**.
2. Enter a name for the decision table, select the application and application scope for the decision table and click **Create & Continue**.
3. Define the inputs and conditions for the decision table.
4. Add the Rank in the Result column and click **Save**.
5. Navigate to **All > System Extension Points > Script Extension Points**.
6. Click on the *sn_ind_tmt_orm.PriorityManagement* script.
7. Click **Create implementation** in the Related Links section.
8. Enter a name for the new script (implementation) and edit the `getRank()` and `getWeightage()` methods in the script to return the rank and weightage values and click **Update**. A sample implementation script is shown below:

```
var PriorityManagement = Class.create();
PriorityManagement.prototype = {
  initialize: function() {},
  getRank: function(customerOrderItemGr) {
    /*
      get rank from decision policy or scripting
      return rank;
    */
    return getRankFromNewDecisionTable(customerOrderItemGr);
  },
  getWeightage: function(){
    /*
      get weightage to calculate priority
      weight should be an integer value, and range is from
      0 to 100.
      return weight;
    */
    return weight_value_for_this_decision_policy;
  },
  type: 'PriorityManagement'
};
```

Calculating the priority for external orders

Orders created by external order capture systems can also be processed by Order Management for Telecommunications. In this case, for

- Order line items:
 - If a valid priority value has been defined for the external order, this value is used to calculate the priority.
 - If a priority value has not been defined or is invalid, the order priority is calculated by the Order Management for Telecommunications system.
- Customer orders: The priority value is calculated based on the categories defined in the decision tables and this value overrides the value specified in the external order.

[End]

[store-future: BEGIN review]

Recalculating the order priority

Manually update the priority field on customer order, order line items, domain orders, and order task forms.

Before you begin

Role required: admin

About this task

When a customer order is updated, all child order line items will be recalculated. If you modify the priority of one or more child order line items, the highest priority level is used to recalculate the customer order priority. You can manually modify the priority value for orders, order line items, domain orders, or order tasks and recalculate the order priority. This option recalculates the priority of the order and order line item by re-evaluating the decision tables and extension point script.

Procedure

1. Navigate to **All > Customer Order Management > Customer Orders**.
2. Select the order that you want to recalculate.
3. Update the Priority field in the Customer Order form or for the order line items and click **Recalculate**.
The decision tables are re-evaluated with the latest order, customer, and urgency data to recalculate the order priority.

[End]

[store-future: BEGIN review]

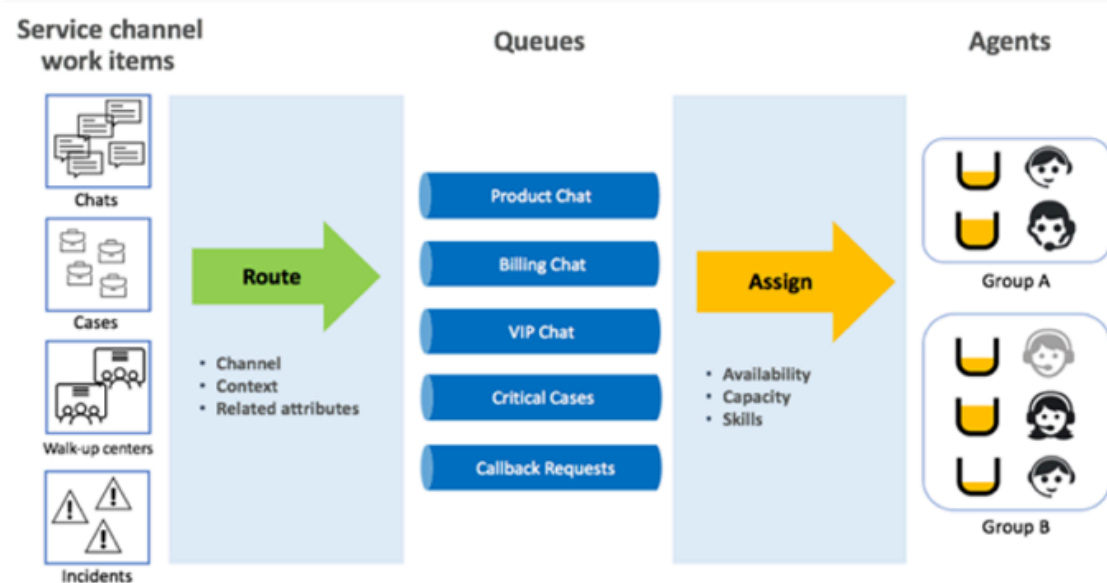
Order routing based on priority using Advanced Work Assignment

AWA can be used to automatically route customer orders based on priority to specific agent categories.

Use AWA to automatically assign work items (order tasks) to your agents based on their availability, capacity, and skills. AWA pushes work to qualified agents using work item queues, routing conditions, and assignment criteria. Agents can view their assignments in their Agent Workspace inbox. The following diagram shows how AWA routes different types of orders to different fulfillment agents.

Note:

All fulfillment agents must have the AWA agent (awa_agent) role.



The following configurations are required for AWA:

- **Service channel:** It is a means of assigning a specific type and scope of work to agents. The Order Service Channel is available with the base system for order tasks. The Order Service Channel is in a disabled state by default and must be manually activated.
- **Agent presence state:** Availability states that agents use to indicate whether they can receive work or are offline or away. Agents set these states in their Workspace Inbox. The default presence states are Available, Away, and Offline. After the Order Service Channel is enabled,

the Available presence state value shows the Order Service channel the customer has to move the order service channel to the selected list to receive the work.

- **Queue:** A queue stores a specific type of work item for a service channel. AWA admins can create queues that focus on certain types of support within the channel, such as VIP customers or critical cases. AWA routes work items to queues based on specific conditions or requirements that you define, such as customer status, or region. Groups assigned to each queue handle the incoming work items. Once work items are placed in a queue, AWA can then assign items to available agents based on assignment rules and agent availability and capacity. Demo queues that can be used as a reference are available with the base system.
- **Assignment rule:** Criteria that determines how work items are pushed to the appropriate agent within a qualified assignment group. A demo assignment rule that can be used as a reference is available with the base system.
- **Agent capacity:** The maximum number of work items on a particular service channel that an agent may actively work on at one time.
- **Agent availability:** States that indicate agent presence and whether the agent is available for work or is busy or offline. AWA uses the agent availability state to determine if an agent is able to receive work.
- **Inbox layout:** A configuration tied to a service channel that defines which fields of a record representing a work item are shown in agent inboxes. A layout defines what the agent sees in Agent Workspace. The Default Order Layout is available with the base system and can be used as a reference to create a new layout.

For more details, see [Advanced Work Assignment](#) 

[End]

[store-future: BEGIN review]

Integrating Order Management with southbound external systems

If you have a Telecommunications Service Management subscription, you can submit outbound service order requests to various external systems by integrating the Order Management application with the external southbound systems.

Overview

After the decomposition of an order, the Order Management application requires the support from external network activation, network configuration, and resource management systems to manage the fulfillment life cycle of the order.

Using this integration, a Communications Service Provider (CSP) can do the following tasks:

- Trigger outbound requests for one or more domain service orders by using the TeleManagement Forum (TMF) 641 Open POST order API.
- Share updates with the external systems about the inflight changes to the existing domain service orders that have outbound requests.
- Manage the inbound response of the outbound requests for the domain service orders.
- Manage the errors and exceptions for the outbound requests and inbound responses.

How the integration works

The integration process for Order Management with the external technical order management systems is as follows:

1. As the administrator, you activate the Service Order Open API to capture the service order from the customer orders. To learn more, see [TMF641 Service Order Open API- POST](#).
2. The integration now begins:
 - a. The order fulfillment manager selects the Create fulfillment request UI action in the domain order table.
 - b. The Service Order Outbound Policy decision table checks the domain order attributes, and the order management system generates the payload for the domain service order.
 - c. The generated payload is sent to the endpoint of the external fulfillment system. For more information on configuring external system endpoints by creating an integration request, see [Flow Designer integrations](#).

Note:

- If the domain order is configured as hierarchical in the decision table, the system sends all the child service domain orders in the hierarchy to the external system that is configured in the application spoke selector.
- If the domain order is configured as non-hierarchical in the decision table, the systems send only the individual domain order to the external system that is configured in the application spoke selector.

To learn more about spokes, see [Building spokes using Spoke Generator](#).

3. The service order manager selects the Create Outbound Fulfillment Request UI action on the service order form and the system shares the service order details with the external systems.

Note:

The UI action appears if any of the following conditions is met by the system:

- No successful outbound request exists for the service domain order yet.
- An outbound request exists but the current external fulfillment state of the service domain order is an error.

4. If the fulfillment request is successful, a response is received from the external system and is captured in the Outbound Request table (sn_tmt_core_outbound_request). To learn more, see [Create an outbound request for the service order](#).

[End]

[store-future: BEGIN review]

Configuring Order Management for customers

As a customer, you must complete some configuration tasks so that you can set up the Order Management application.

Order Management configuration tasks for customers

Task	Description
1. Install and set up Service Bridge customers	Install and set up the application so that you can integrate your instance with the instance of your provider. This integration enables synchronous publishing of product and service catalogs so that your employees can submit product or service requests.

Order Management configuration tasks for customers (continued)

Task	Description
	Note: For more information, see Install Service Exchange (legacy)  .
2. Assign catalog_admin role	Assign the catalog_admin role to the users who manage the service catalogs. Users with this role can publish product offerings from providers to their service catalog.
3. Review and publish product offering catalogs	Review and publish product offering catalogs that you received from your service providers.

[End]

[store-future: BEGIN review]

Review and publish product offerings to service catalogs

Review and publish a product offering to your service catalog so that your employees can request the products and services that they require.

Before you begin

Role required: catalog_admin

Procedure

1. Navigate to **All > Service Bridge > Customer > Provider Product Offerings**.
2. Select the product offering to review.
3. Select **Publish**.
The product offering is published to the service catalog in your self-service portal.

Note:

To remove a product offering or catalog item, open the Catalog Item record and set the user criteria in the Not Available For related list to **Everyone**.

What to do next

Your employees can submit requests for products and services from the IT Service Catalog in the self-service portal. Service Bridge integration enables your providers to synchronously receive and fulfill these product or service requests.

[End]

Configuring specification version update

Configure the specification version update so that product specifications reflect third-party specification changes.

Before you begin

Role required: product_catalog_admin

About this task

To configure the product specification version change, modify the check-for-an-incoming-specification ID and the product inventory specification ID.

Procedure

1. Navigate to **All** and enter `sys_properties - list` in the search area to open the **System Properties** list.
2. In the **System Properties** list, search for `sn_ind_tmt_orm.allowSpecVersionUpdateInChangeOrder` then select to open the system property.
The system property record may be in an uneditable state. Select the message to make the record editable.
3. In the **Value** field, set the value to `true`.
4. Select **Update**.
The specification version update is activated.

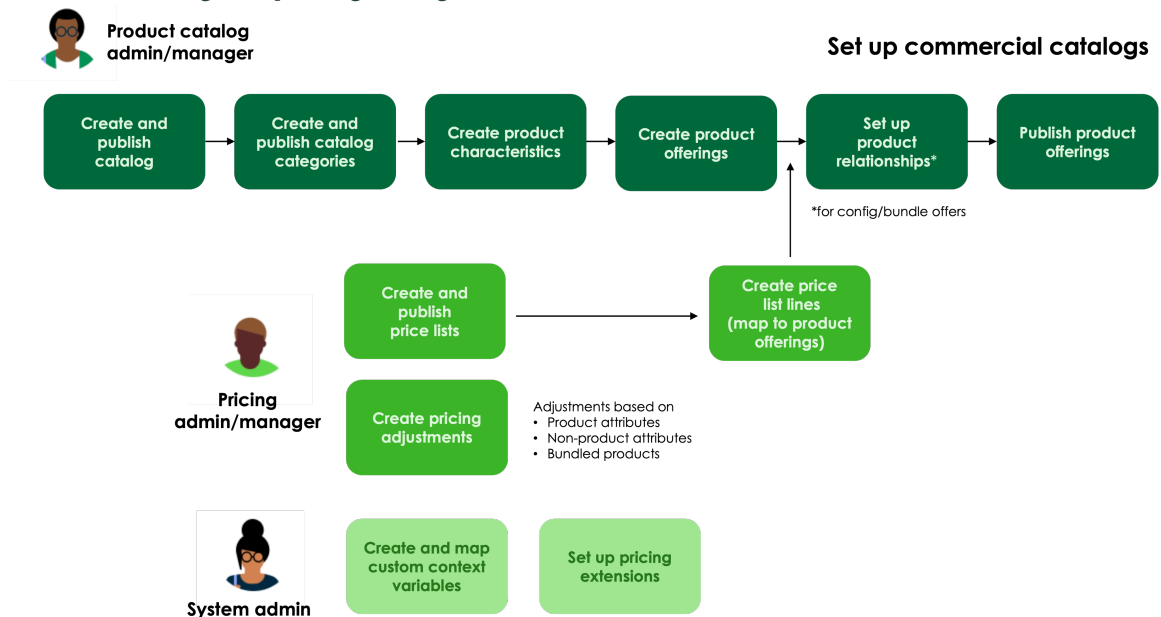
Configuring product offerings and catalogs

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

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

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

Product catalog and pricing configuration workflow



Note:

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

Overview of product catalog configuration

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

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

Product offering and catalog management configuration tasks

Configuration task	Description
Create a product offering catalog	Create a catalog, which is the top-level entity in the catalog hierarchy. Catalogs can have categories, and categories can have subcategories or product offers.
Create a product offering category	Define a product offering category used to organize similar product offerings in a catalog. Catalog categories make it easier for agents to browse and navigate product offerings when creating opportunities, quotes, and orders.
Create product characteristics and characteristic options	Define the specific attributes, properties, and options that distinguish a product offering, influencing its configuration and pricing.
Create product offerings	Configure and add product offerings to catalogs and categories. Once published, product offerings are available to Sales and Order Management agents as they create opportunities, quotes, and orders.
Add product visuals	Add images and thumbnails to your product offerings to help agents as they build opportunities, quotes, and orders.
Create product offering relationships	Create product relationships to bundle products and services together to streamline the order process. Product offering relationships drive the order capture experience by letting you group multiple product offerings into bundles. Bundles also let you offer special bundle pricing.
Add related contracts to product offerings	Add related contracts to your product offerings in the Sales and Order Management application.
Add a unit of measure to a product offering	Add a unit of measure (UOM) to a product offering in Sales and Order Management.
Create a product offering version	Create a product version to add updates to a published product offering.
Create product offering relationship groups	Combine bundles of product offerings into related groups in Sales and Order Management.
Configure needs analysis	Create needs templates, which are questionnaires from product selection guides that your agents use to determine what product offers can be added to opportunities.
Export and import product catalog entities	Export and import product catalog entities between ServiceNow instances. For example, you can promote catalog entities from a non-production instance to a production instance.

Create a product offering catalog

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

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

Product Offering Catalog form

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

4. Select **Save** and then **Publish**.

The product offering catalog is in the Draft state.

5. Select **Publish**.

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

What to do next

Create product offering categories.

Create a product offering category

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

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

Product Offering Category form

Number	A unique system-defined number that identifies the product category.
Name	Name of the category.
Leaf	Option indicating there are no subcategories for this category. Select Leaf can have product offers but not subcategories. If Leaf isn't checked, it can only have subcategories but not product offers.
Thumbnail image	Thumbnail image for the product offering category. Select Attach Image to upload your image.
Image	Image of the product offering category. Select Attach Image to upload your image.
Description	A brief description of the category.
State	State of the category: ○ Draft: Initial state of the category, before it's published. ○ Published: The product category has been published to the catalog. After a category is published, you can update it. You can delete, retire, or archive it if there are no associated product offerings.

	- Retired: Category has been retired and is no longer active. The category can't be updated. - Archived: Category has been archived and is no longer available for use. - Copied to Catalog: The product category has been copied.
Start date	Date and time that the category is available in the catalog. Select the Calendar icon to choose the start date and time, then select OK .
End date	Date and time that the category is no longer used in the catalog. Select the Calendar icon to choose the end date and time, then select OK .
Code	Product code for the category. The system automatically generates a code based on the category Name entered, but you can change the value to any desired alphanumeric string.

5. Select **Save**.

6. Associate the category to a catalog.

a. In the Catalogs tab, select **New**.

b. In the Catalog Category form, select the published Catalog to which this category belongs and select **Save**.

7. In the Details tab for the category, select **Publish**.

The category state changes to Published and is added to the selected catalog.

8. If needed, define the parent category and subcategories for the category using the Parent categories and Child categories tabs.

What to do next

[Create product offerings](#).

Activate the display of product catalog visuals

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

Before you begin

Role required: admin

About this task

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

Procedure

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

Create product offerings

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

Before you begin

Role required: `sn_prd_pm_product_catalog_admin` and `sn_prd_pm_product_catalog_manager`

Procedure

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

Product Offering form

Field	Description
Number	System-assigned number for the product offering.
Name	An alternative name for the product offering to help differentiate it from similar product names.
Display Name	The name of the product offering that is added.
Offering Type	Offering types. Select one of the following: ○ Product: A product entity that an agent can add to an order using the CSM Configurable Workspace. ○ Entitlement: An entity such as a warranty or subscription that can be added to an order by an agent.
Offering sub-type	Type of entitlement: ○ Warranty ○ Extended warranty ○ License ○ Subscription
Product specification	Functional view of a product offering that drives order fulfillment.
Product model	Name of the product model.

Field	Description
Create contract	Option that indicates to agents that entitlement contracts can be added to the product order. If selected, service contracts are created post order fulfillment. Used when entitlements are managed as contracts.
Sellable	Option that indicates the product offering can be sold as a standalone item. If selected, the product offering can be sold as a standalone item. If not selected, the product offering can be sold as part of bundle but not as a standalone item.
Pricing method	Pricing method for the product: - One-time: A single fee for the product. - Recurring: A fee that occurs at scheduled intervals. You can set the periodicity for a recurring fee.
Periodicity	Recurring pricing: Monthly or annually.
Description	Short description of the product offering. The description is useful for the order agent to understand the product during the order process.
Offering Catalog	Catalog that contains the product offering.
Start Date	Date and time that the product offering is available for Sales and Order Management applications. Select the Calendar icon (📅) to choose the start date and time, then select OK .
End Date	Date and time that the product offering is deleted from Sales and Order Management applications. Select the Calendar icon (📅) to choose the end date and time, then select OK .
State	State of the product offering. States include In Draft, Published, Retired, and Archived. You can update product offerings In Draft state.
Distribution channel	Option to set and lock in a distribution channel.
Owner	Owner of the product offering.
Monthly recurring charges	Charges that recur every month. Monthly recurring charges are supported for backward compatibility. Use price lists to define prices.
Non recurring charges	Charges that are applied once. Supported for backward compatibility. Use price lists to define prices.
Code	System-generated alphanumeric number based on the product name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes.
Initial version	Version of the product offering.
Previous version	Several versions of a product offering can exist. This field lets you view previous versions.
Contract term	Length of the contract: 12 months 24 months

Field	Description
	○ 36 months ○ 48 months ○ 60 months

4. Select **Save**.

What to do next

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

Create product characteristics and characteristic options

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

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

Procedure

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

Create New Characteristic

Field	Description
Name	Name of the product characteristic.
Code	System-generated alphanumeric number based on the product characteristic name. Although system generated, you can edit the code to represent a SKU or any other industry specific product codes.
Description	Brief description of the characteristic, for example DSL speed.

Field	Description
Input type	List of input options that identify the functionality for the characteristic. Depending on the input type, additional options become available: ○ Checkbox ○ Choice ○ Single Line Text ○ Yes/No

5. Select **Save.**

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

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

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

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

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

What to do next

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

Add characteristic and characteristic options to a product offering

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

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

Procedure

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

4. In the form, fill in the fields.

Product Offering Characteristic form

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

5. Select **Save**.

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

Add product visuals

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

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

Procedure

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

Product Visuals

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

6. Select **Save**.

Note:

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

What to do next

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

Add product catalog categories

Use the Product Offering Categories tab to organize your products in groups in Sales and Order Management.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

Product catalog categories help organize products into groups, which makes it easier for order agents to find products while creating orders or building quotes. Catalog categories are associated with a catalog. For more information about catalogs, see [Create a product offering catalog](#).

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

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

Procedure

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

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

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

What to do next

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

Create product offering relationships

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

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

Procedure

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

Product Offering Relationship form

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

6. Select **Save.**

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

What to do next

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

Add related contracts to product offerings

Add related contracts to your product offerings in the Sales and Order Management application.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

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

Contract Product Offering

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

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

What to do next

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

Add a unit of measure to a product offering

Add a unit of measure (UOM) to a product offering in Sales and Order Management.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

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

Unit of Measure form

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

6. Select **Save**.

What to do next

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

Create a product offering version

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

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

Procedure

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

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

What to do next

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

- Create product offering relationships
- Add related contracts to product offerings
- Create product offering relationship groups

Create product offering relationship groups

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

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

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

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

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

The image shows two screenshots from the ServiceNow interface. The left screenshot is the 'Product Offering Relationship Groups' form, showing a table of product offerings with columns for Name, Description, Unit of measure, Default, Mandatory, Default quantity, Max quantity, and Min quantity. The right screenshot is the 'Internet and OTT Bundle' product configurator, showing a list of product offerings grouped into categories like Streaming Channel, Internet Plan, and Modem Group. A green arrow points from the 'Product Offering Relationship Groups' form to the product configurator, indicating the relationship.

Procedure

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

Product Offering Relationship Group form

Field	Description
Name	Name of the relationship group.
Description	A description of the relationship group.

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

6. Select **Save**.

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

What to do next

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

Exporting and importing product catalog entities

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

Overview

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

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

Export and import process

Follow these steps to export and import product catalog entities.

Export and import product catalog steps

Step	Description
Export product catalog entities	Export product catalog entities from one instance to another. The entities are exported

Export and import product catalog steps (continued)

Step	Description
	as JSON and are downloaded to your local download directory.
View export job status	Check the state of the export job.
Import product catalog entities	Import product entities exported as JSON files to another instance.
View import job status	Check the state of the import job.

Note:

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

Add Code field values to catalog entities after upgrading

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

Before you begin

Role required: admin

About this task

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

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

Procedure

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

Result

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

Export product catalog entities

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

Before you begin

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

Role required: product_catalog_admin

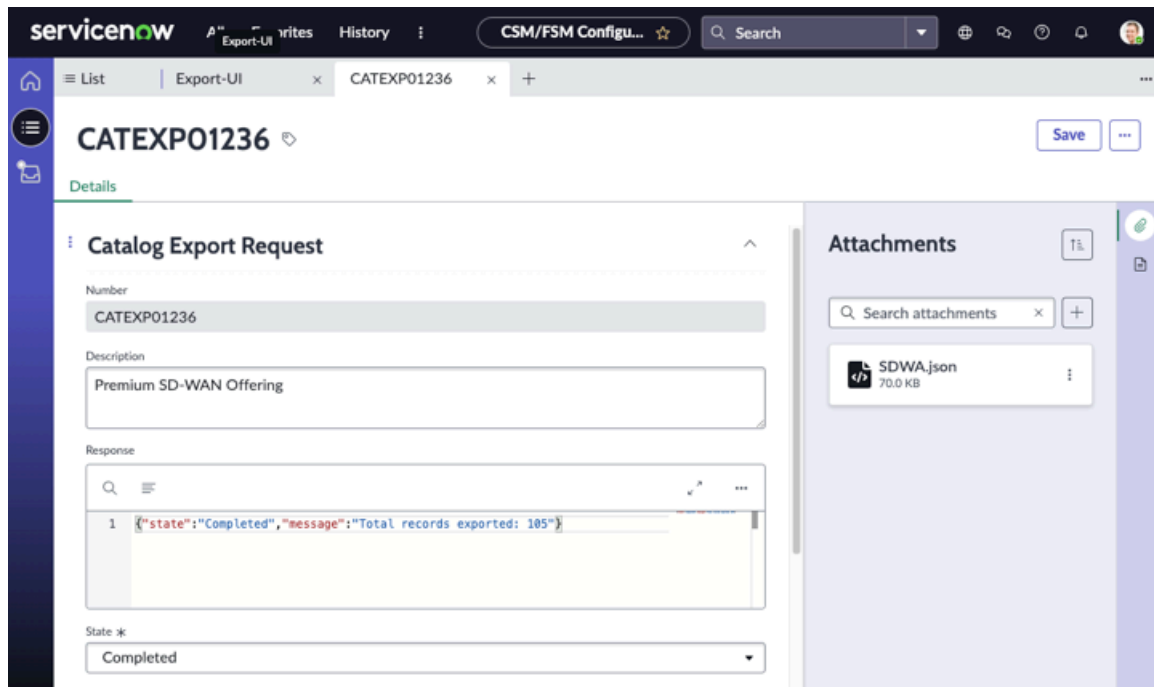
About this task

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

Procedure

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

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



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

What to do next

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

View export job status

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

Before you begin

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

Procedure

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

What to do next

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

Import product catalog entities

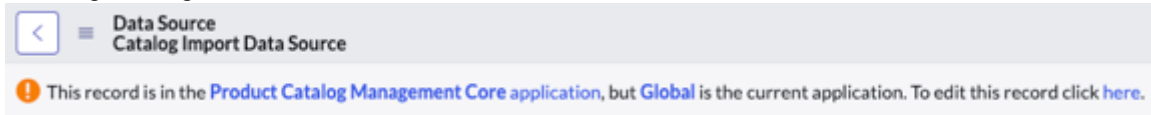
Import product catalog entities by using the ServiceNow Platform import function.

Before you begin

Role required: product_catalog_admin

Procedure

1. Go to the target instance where you want to import the data.
2. Navigate to **All > Product Catalog Management > Catalog Import > Import**.
The Catalog Import Data Source window opens.
3. If the following message appears, select the link to change the application scope to Product Catalog Management.



4. Attach the JSON file by selecting the **Attachments** (📎) icon.
5. Select **Choose file** and select the file you want to import.

Note:

When you're importing files to a target instance, import the files in a certain order, based on the type of entity:

- a. Import the exported base entities first, for example characteristics, characteristic options, template, and Unit of Measure (UOM).
- b. Import the product offering catalog if you're exporting product offerings.
- c. Import product offerings, product specifications, and service specifications.

6. When the file is uploaded, close the Attachments window.
7. Under Related Links, select **Load All Records**.
The data from the imported file loads, and a Progress window opens showing the imported job.
8. Select **Run Robust Transform**, then select the **Transform** button.
9. In the Progress window under the Next Steps section, select the imported file name to view the results.
The imported data is loaded into the correct tables.
10. Navigate to the Entity list view of the entity that you imported to check the imported data.

What to do next

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

View import job status

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

Before you begin

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

Procedure

1. Navigate to the product catalog or pricing module.
 - To check product catalog entities, navigate to **All > Product Catalog Management > Catalog Import**.
 - To check pricing entities, navigate to **All > Pricing > Import**.

2. Select the links under **Related Links** to view import job status:

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

Caching in Product Catalog Management

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

Overview

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

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

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

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

Update a cache in Product Catalog Management

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

Before you begin

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

Procedure

1. Navigate to the record that you updated.

2. Right-click the **Additional actions** menu in the record header and select **Regenerate Configuration JSON**.

The system immediately updates the associated cache for the product offering or product offering catalog. You can then view the changes that you made to the **Unit of Measure** in a product offering or the product offering catalog.

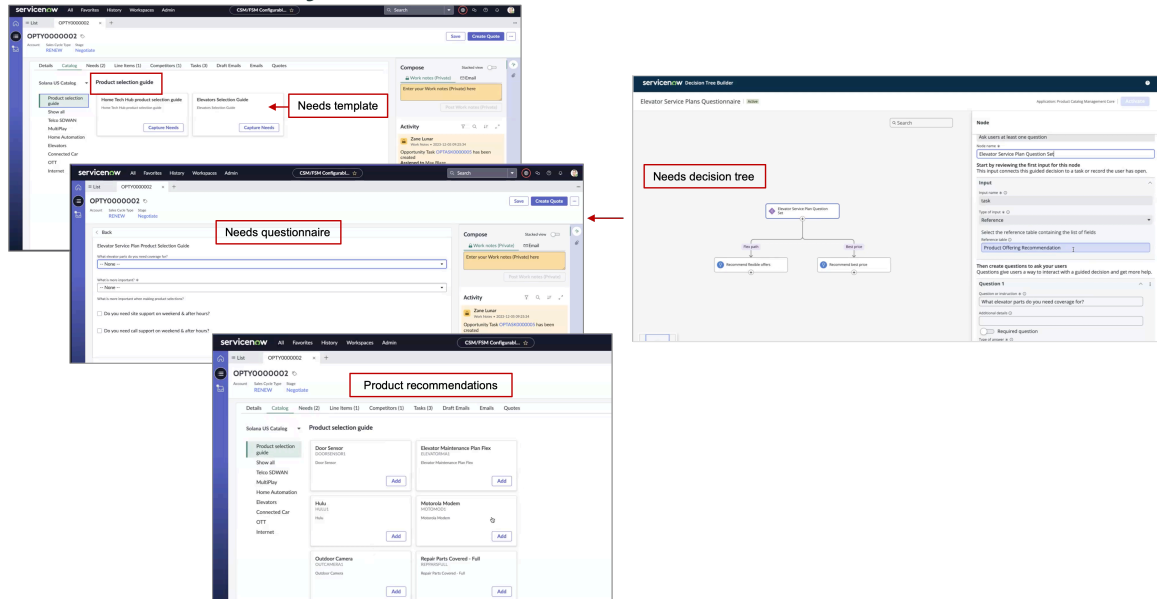
Configuring needs analysis

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

Overview

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

Elements of needs analysis



Needs template

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

Needs decision tree

A multi-step, guided decision process that presents a series of questions to the agent. The decision tree defines the question nodes, expected answers, connection points, decision logic, and guidance for decision paths in the questionnaire. You use Decision Tree Builder to create and build the decision tree.

Product recommendations

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

Working with decision trees

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

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

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

Setting up needs analysis

Follow these steps to configure needs analysis:

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

Create a product recommendation

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

Before you begin

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

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

Procedure

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

Product Offering Recommendation New record form

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

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

What to do next

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

Create a decision tree for a needs template

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

Before you begin

Before creating decision trees, review the following information:

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

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

Procedure

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

2. Select **New**.

On the form, fill in the fields.

Decision Tree form

Field	Description
Name	Name of the decision tree.
Action Label	Label of the decision tree displayed on the needs template card in the product selection guide.
Description	Brief description of the decision tree displayed on the needs template card in the product selection guide.
Title	Name of the decision tree on the needs template card in the product selection guide.
Show a dismiss button	Option that shows or hides the Dismiss button that cancels the flow of a decision tree during opportunity creation. This field is enabled by default.

3. Select **Submit**

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

What to do next

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

Build a needs decision tree

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

Before you begin

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

About this task

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

Procedure

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

What to do next

[Create a needs template and set the catalog relationship](#).

Create a needs template and set the catalog relationship

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

Before you begin

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

Procedure

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

Needs Template

Field	Description
Number	Unique system-assigned number that identifies the needs template.
Name	Name of the needs template, for example Home Tech Product Selection Guide.
Decision tree	Name of the decision tree that has the questionnaire to determine customer product needs.
Description	Brief description of the needs template.
Start date	Date and time that the needs template becomes effective and is listed in the product selection catalog.
End date	Date and time that the needs template is no longer effective and not listed in the product selection catalog.
State	Stage of the needs template: ○ Draft: Initial state of the needs template. The template hasn't been published yet. ○ Published: Template has been published. After a template is published, you can update or delete it.

3. Select **Submit**.

The needs template is displayed in the Needs Template list.

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

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

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

c. Select **Submit**.

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

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

Use extension points for open state management

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

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

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

State management extension points

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

Create a product offering catalog

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

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

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

Product Offering Catalog form

Field	Description
Number	System-generated number that identifies the product catalog.
Name	Name of the catalog.
Thumbnail image	Thumbnail image of your catalog. Select Attach Image to upload your image.
Image	Image of your catalog. Select Attach image to upload your image.
Default	Option that indicates this catalog is the default catalog displayed to your agents. Agents can switch from one default catalog to another.
Description	A brief description of your product catalog, for example.
State	State of the catalog. The supported lifecycle states are Draft, Published, Retired, and Archived.

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

4. Select **Save** and then **Publish**.

The product offering catalog is in the Draft state.

5. Select **Publish**.

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

What to do next

Create product offering categories.

[store-future: BEGIN review]

Configuring order enrichment flows using Decision Tables

Associate enrichment subflows with the product or service specifications by using the Order Enrichment Flow Policy in Decision Tables.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Decision Builder**.
2. Select the **Order Enrichment Flow Policy** decision table.
3. In the **Specification** column of the conditions section, select the order line item to set a condition.
4. Select the product offering in the **Offering** column.

Result

A list of subflows appear in the results section. These sub flows create the enrichment tasks for an order line item during the enrichment process. For more information, see [Decision Builder](#).

[End]

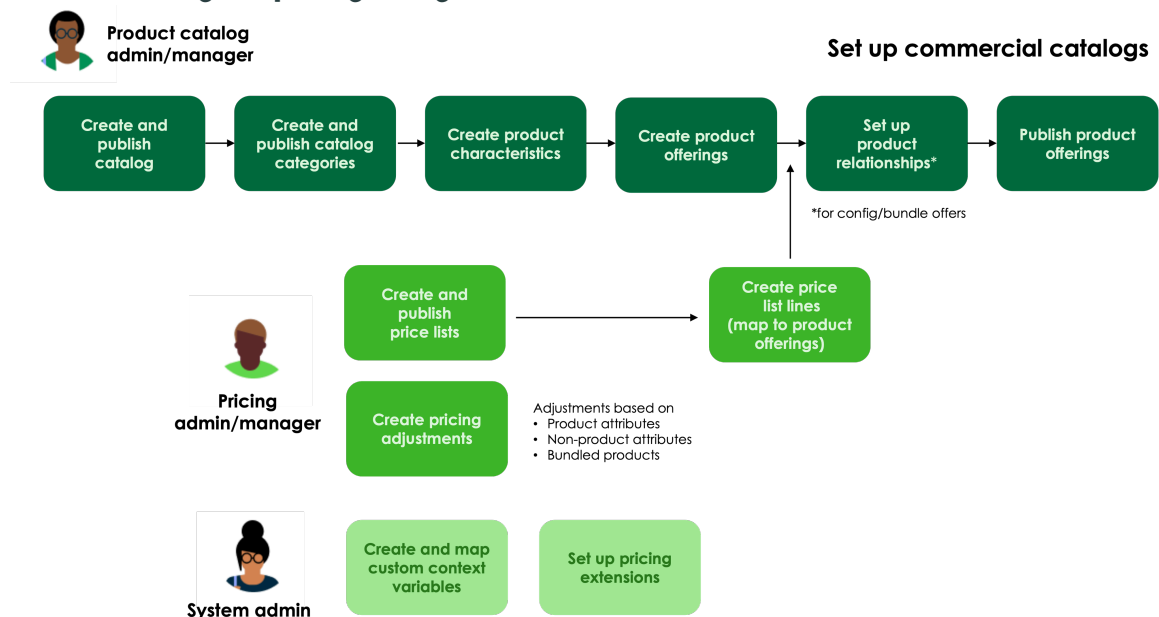
Configuring product pricing

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

Pricing configuration overview

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

Product catalog and pricing configuration workflow



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

Note:

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

Configuration tasks for Pricing Management

Configuration task	Description
Create and publish a price list	Define a price list that identifies basic pricing features, such as the currency used or the customer account to which the price list applies.
Create a price list line	Add line items to a price list. A price list line identifies the list price for a product offering.
Control the default price list on transaction header or header line	Specify the conditions that control when a default price list is used for an opportunity, quote, or order by using the Price List Defaulting Matrix.

Configuration tasks for Pricing Management (continued)

Configuration task	Description
Create and publish a product attribute-based pricing adjustment	Define pricing adjustments based on certain product characteristics.
Create and publish a cost book	Create a cost book that identifies the currency of the unit costs defined for a set of product offerings.
Create a cost book line	Add line items to a cost book. A cost book line defines the unit cost for a product offering. This feature is used in Quote Management, which uses unit costs to provide cost margins for products in sales quotes.
Create a non-product attribute pricing adjustment	Define pricing adjustments for products based on non-product characteristics such as shipping zip code, location, sales channel, or account segment by using the Standard Price Adjustment Matrix.
Create pricing adjustments for bundled products	Define the pricing adjustments for child product offerings in a bundled product by using the Configuration Component Price Adjustment Matrix.
Create a price matrix version	Create a version of a published price matrix when you need to update the matrix, for example to add or delete a context variable used in the price matrix.
Set properties to control pricing processing	Manage the processing of pricing features, such as how certain pricing calculations are made.
Create a pricing context variable	Create a custom variable that represents an attribute that can be used in a pricing matrix, for example to create a non-product attribute adjustment.
Map a custom context variable to a transaction entity	Associate a custom pricing context variable to a particular transaction entity type in Sales and Order Management.
Use extension points in Pricing Management	Apply pricing extension points to use pricing information from external sources or extend the pricing engine logic on how list prices or adjustments are calculated.
Export and import pricing entities	Export and import pricing entities between ServiceNow instances. For example, you can promote pricing entities such as price lists from a non-production instance to a production instance.

Create and publish a price list

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

Before you begin

Role required: `sn_csm_pricing_pricelist_administrator`, `sn_csm_pricing_pricelist_manager`

About this task

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

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Prices > Price Lists**.
3. Select **New**.
4. In the Details tab, fill in the fields.

Create New Price List

Field	Description
Number	Unique system-assigned number that identifies the price list.
Name	Name of the price list.
Code	System-generated alphanumeric number based on the price list name. Although the code is system-generated, you can edit it to represent any industry-specific product code.
Currency	Currency of the price list, for example USD for US dollars.
Account	Optional. Account of the customer to which this price list applies.
Default	Option for setting this price list as the default price list with the specified Currency or for the specified Account.
Description	Description of the price list.
State	Stage of the price list: ○ Draft: Initial state of the price list. Information is still being added to the price list and hasn't been published to the catalog yet. ○ Published: Price list has been published to the catalog. After a price list is published, you can update, delete, retire, or archive it. ○ Retired: Price list has been retired and is no longer active. The price list and its price list lines cannot be updated. ○ Archived: Price list has been archived and is no longer available for use. Note: A default price list cannot be deleted, retired, or archived.
Start Date	Starting date and time that the price list is effective. Select the Calendar icon () to choose the start date and time, then select OK .

Field	Description
	Note: If this is a default price list, the start date must be either the current date or a date that is earlier than the current date.
End Date	Ending date and time of the price list. Select the Calendar icon to choose the end date and time, then select OK . After the ending time, the price list is no longer active. Note: If this is a default price list, the end date is ignored.

5. Select **Save.**

The price list is in the Draft state.

6. Select **Publish.**

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

What to do next

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

Create a price list line

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

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

Price List Line

Field	Description
Number	Unique system-assigned number for the price list line.
Price List	Name of the price list.
Product Offering	Product to which this price list is associated.
Unit of Measure	Unit of measure for the product.
List price	Price set for the product offering, which is the full price that a product or service is sold for, without any discounts or promotions applied.
Start Date	Starting date and time that the price list line is effective. Select the Calendar icon () to choose the start date and time, then select OK .

Field	Description
End Date	Ending date and time that the price list line is no longer effective. After this time, the price list line is no longer active. Select the Calendar icon () to choose the end date and time, then select OK .
Pricing Method	Type of pricing selected when the product offering was created: - Recurring: Payment fee that occurs over certain intervals. - Non Recurring: one-time payment fee.
Periodicity	Frequency of recurring pricing: - Monthly - Annually

5. Select **Save**.

Control the default price list on transaction header or header line

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

For base systems, if a customer account is populated on a transaction header and a valid account-based price list exists, the header defaults to the account-based price list. If no account-based price list exists, the default currency-based price list is used.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricings Matrices list, select Price List Defaulting Matrix.
4. Select **Edit Rule**.
The Decision Table for the Price List Defaulting Matrix opens in Workflow Studio and displays the inputs and the decision table for setting the conditions to display the default price list in the header.
5. In the decision table, set the rule for displaying the default price list:
 - a. In the **Header Price List Type** column in the Results section, select the Edit icon to add the price lists that can be applied, for example an account-based price list or a currency-based price list.
 - b. In the Condition section, select **Add new decision row**.
 - c. In the row, select the column for the input to be applied, such as **Account** and select the condition.
 - d. In the Results section, select the **Header Price List Type** column and select the price list to be applied, for example an account-based price list or a currency-based price list.
6. Select **Save**.
The default price list is available to sales or order agents when working on the transaction header for opportunities, quotes, or orders or when working on the transaction line, for example a quote line or order line.

Create and publish a cost book

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can create multiple cost books that define the unit costs for a set of products and specified currency. The first cost book that you create for a particular currency is automatically set as the default cost book. When you're creating a default cost book, the start date must be either the current date or a date earlier than the current date.

Procedure

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

Create New Cost Book

Field	Description
Number	Unique system-assigned number that identifies the cost book.
Name	Name of the cost book, for example Standard Cost Book.
Code	System-generated alphanumeric number based on the cost book name. Although the code is system-generated, you can edit it to represent an industry-specific code.
Currency	Currency of the cost book, for example USD for US dollars.
Description	Brief description of the cost book.
State	Stage of the cost book: ○ Draft: Initial state of the cost book. Information is still being added to the cost book and hasn't been published to the catalog yet. ○ Published: Cost book has been published to the catalog. After a cost book is published, you can update, delete, retire, or archive it. ○ Retired: Cost book has been retired and is no longer active. The cost

Field	Description
	book and its cost book lines can't be updated. ○ Archived: Cost book has been archived and is no longer available for use. Note: A default cost book can't be deleted, retired, or archived.
Start date	Starting date and time that the cost book is effective. Select the Calendar icon () to choose the start date and time, then select OK. Note: If this date is for a default cost book, the start date must be either the current date or a date that is earlier than the current date.
End date	Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar icon () to choose the end date and time, then select OK. Note: If this date is for a default cost book, the end date is ignored.

5. Select **Save**.

The cost book is in the Draft state.

Note:

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

6. Select **Publish**.

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

What to do next

[Create a cost book line.](#)

Create a cost book line

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

Procedure

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

Cost Book Line

Number	Unique system-assigned number for the cost book line.
Cost Book	Name of the cost book to which this line is added.
Code	System-generated alphanumeric number based on the cost book name and the line item to be created. Although the code is system-generated, you can edit it to represent any industry-specific code.
Product offering	Product to which this cost book line is associated.
Unit of measure	Unit of measure for the product.
Cost	Unit cost of the product, which is the cost incurred to produce or procure the product.
Start date	Starting date and time that the cost book is effective. Select the Calendar icon () to choose the start date and time, then select OK .
End date	Ending date and time of the cost book. After the ending time, the cost book is no longer active. Select the Calendar icon () to choose the end date and time, then select OK .
Pricing method	Type of pricing selected when the product offering was created: ○ Recurring: Payment fee that occurs over certain intervals. ○ Non Recurring: one-time payment fee. i Note: The Pricing Method is auto-populated when the product offering is selected.
Periodicity	Frequency of recurring pricing:

	○ Monthly ○ Annually Note: The Periodicity is auto-populated when the product offering is selected.

4. Select **Save**.

Create and publish a product attribute-based pricing adjustment

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

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

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Attribute Adjustments**.
3. In the Pricing - Attribute Adjustments list, select **New**.
4. On the Attribute Adjustment form, specify the product characteristics used to determine the adjustment:
 - a. Enter the **Name** of the attribute adjustment rule, for example, Make and Model selection.
 - b. If you want to change the system-assigned **Code** based on the attribute adjustment name, enter a different alphanumeric value.
 - c. If you want the adjustment to apply to all price lists, select **Apply to all Price Lists**.
 - d. Select the **Product offering** to which this adjustment applies.
 - e. If this attribute adjustment applies to a specific price list line and not all price lists, select the **Price list line**.
 - f. Select the **Start Date** that this attribute adjustment begins.
 - g. Select the **End Date** that this attribute adjustment ends, if applicable.
 - h. Unlock the **Product Characteristics** field and select the product characteristics to be used to differentiate the product price.
 - i. Select **Save**.
5. In the Attribute Adjustment, select **Create Rule**.
The Decision Table for the adjustment opens in Workflow Studio and displays the inputs, which are the product characteristics that you selected, and the decision table that contains the columns for setting the attribute adjustment rule conditions.
6. Set the attribute pricing rule:

- a. In the Conditions section, select **Add new decision row**.
 - b. In the row, select an attribute column and select the appropriate value.
For example, if a product has attribute columns labeled **Make** and **Model**, select each column and then select the appropriate value.
 - c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
 - d. In the **Adjustment Value** column, enter the adjustment amount.
 - e. Select **Save**.
The adjustments are made to the price lists or the price list line, depending on the options selected in step 3.
- 7. Optional:** Test your decision table.
For more information on testing your decision table before publishing it, see [Test a decision table in Decision Builder](#) .
- 8.** In the **Details** tab for the attribute adjustment, select **Publish**.
The pricing attribute adjustment is available to agents when they create an opportunity, quote, or an order.

Create a non-product attribute pricing adjustment

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

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

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

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select Standard Price Adjustment Matrix.
4. If you want to remove any of the context variables in the Content variables section In the Rule Matrix Standard Price Adjustment Matrix record, delete the pills that represent context variables for non-product attributes.

5. If you have a large number of rows in the decision table and you want to optimize rule matrix performance, in **Query optimization variables**, select one or more context variables that the system uses to filter the pricing decision table rows that are evaluated.
6. Select the option in **Rule selection criteria** that indicates whether single or multiple rules are applied in the Standard Adjustment Matrix.
If multiple rules match and the option is marked true, all applicable pricing rules are applied when evaluating adjustments for product offers. If the option isn't selected, the first rule based on priority is applied for adjustment calculation.
7. Select **Edit Rule**.
The Decision Table for the Standard Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which are the default non-product characteristics available, and the decision table section that contains the columns for setting the non-product attribute adjustment rule conditions.
8. If you have a custom context variable to add as an input, select **+Add** and add the custom variable **Label**, **Type**, **Reference** (if applicable), **Mandatory** indicator, and **Add condition column**, which adds the variable to the Conditions section.
9. In the decision table, set the pricing rule for the non-product attribute:
 - a. In the Conditions section, select **Add new decision row**.
 - b. In the row, select the columns for the non-product attributes to be applied, such as **Shipping State** and **Account**, and select the appropriate values.
 - c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
 - d. In the **Adjustment Value** column, enter the adjustment amount.
 - e. In the **Adjustment Description** column, enter a brief description of the adjustment, for example, Adjustment for state location.
 - f. Select **Save**.
The adjustments are available to sales or order agents when working on quotes or orders.

Create pricing adjustments for bundled products

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

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

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select Configuration Component Price Adjustment Matrix.

4. Select **Edit Rule**.

The Decision Table for the Configuration Component Price Adjustment Matrix opens in Workflow Studio and displays the inputs, which include the parent product offering and its child product offerings that comprise the bundle, and the decision table section that contains the columns for setting the conditions and the pricing adjustments to be applied to the child product offerings in the bundle.

5. In the decision table set the pricing rule for the child product offerings in the bundle:

- a. In the Conditions section, select **Add new decision row**.
- b. In the row, select the columns for the product offerings to be applied and select the appropriate values.
- c. In the Results section, select the **Adjustment Type** column and choose the type of adjustment, for example Markdown % or Markdown amount.
- d. In the **Adjustment Value** column, enter the adjustment amount.
- e. In the **Adjustment Description** column, enter a brief description of the adjustment.
This description is copied to the adjustment record linked to the quote or order line when the product offer is added to the quote or order. Consider creating a description that is formatted with a unique ID followed by a text description. You can use the unique ID to audit the adjustment generated when the quote or order is being configured, and the agent can use the description to understand the reason for the adjustment.
- f. Select **Save**.
The adjustments are available to sales or order agents when working on quotes or orders.

Create a price matrix version

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can create a version of a published Standard Price Adjustment Matrix, Price List Defaulting Matrix, or Configuration Component Price Adjustment Matrix. When you create a matrix version, the new version becomes the active version. After creating the version, you update the decision table for the matrix, then save and publish the matrix.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Pricing > Pricing Matrices**.
3. In the Pricing Matrices list, select the matrix to be updated.
4. In the Details tab for the matrix, select **Create new version**.
The following changes occur:
 - The new version of the matrix opens in another tab.
 - In the former matrix, the **State** changes from Published to Retired and the System **System defined** value changes to false.

5. Change the matrix as needed.

For example, if you're updating context variables used in the Standard Price Adjustment Matrix, you can add or delete context variables in the **Context variables** section of the matrix.

6. Select **Save**.

7. Update the decision table for the matrix by selecting **Create rule**.

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

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

You can refresh the Pricing Matrices List to see the new matrix version.

Set properties to control pricing processing

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

Before you begin

Role required: admin

About this task

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

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

Procedure

1. Navigate to **All > Pricing > Administration > Properties**.

2. Set the following properties:

Customization properties for pricing

Property	Description
Logging Pricing Requests (sn_csm_pricing.log_pricingengine_request)	Control the logging of pricing engine requests for debugging. Select Yes to activate logging or No to turn off the pricing request log.
Method used to stack multiple adjustments defined in matrices (sn_csm_pricing.matrix_multiple_adjustments_handling)	Control how multiple pricing adjustments from different pricing matrices are applied. Select one of the following: ○ Starting List Price: Calculate adjustments based on the list price of the product. ○ Running Total: Calculate current adjustment by applying the adjustment calculations on the previous adjusted value.
Pricing Engine Parallel Execution	Set properties that optimize the processing time for pricing transactions.

Property	Description
- Enable the pricing engine to perform parallel processing of transaction lines when a transaction threshold is met. (sn_csm_pricing.enable_pricing_engine_parallel_execution) - Set the number of transactions that must be met before the pricing engine can run parallel processing. (sn_csm_pricing.pricing_engine_parallelism_lines_threshold)	- The parallel execution property is set to Yes by default. Select No to turn off parallel execution and process the transaction lines serially. If you select No, the system ignores the threshold value. - The default threshold value is 100. You can enter a different number that represents the minimum number of transaction lines that must be met before the pricing engine can perform parallel processing using multiple threads. Note: Parallel processing isn't performed by the pricing engine for calls to the product configurator pricing integrations, even if the number of transaction lines meets the parallelism threshold.

3. Select **Save**.

Create a pricing context variable

Create custom context variables to represent product or non-product characteristics that pricing administrators can use to apply various pricing features, such as pricing adjustments, in Pricing Management.

Before you begin

Before creating a pricing context variable, review the context variables available in the Context Variables [sn_csm_ctxrul_mgt_context_variable] table to verify whether you need a new one. This table identifies the system-defined variables provided with Pricing Management and also any custom pricing variables that have been created. For example, the system-defined context variables provided for non-product attributes include: Account, Shipping Country, Shipping City, Shipping State, Shipping Zip, Billing Country, Billing City, Billing State, Billing Zip, and Transaction Date.

Role required: admin

About this task

As an administrator, you can create custom context variables for items such as non-product characteristics, that your pricing administrators can use in pricing matrixes to control pricing features. For example, your pricing administrator might want to define pricing adjustments based on sales segment, but sales segment isn't a system-defined context variable included with Pricing Management.

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

Procedure

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

Context Variable form

Field	Description
Type	Context variable type. Choose the type of field for the variable. For example, the choice list field type lets your user select from a pre-defined list of choices. For more information on the different field types, see Field types  .
Label	Name of the context variable, for example, sales segment.
Column name	ID of the context variable for which the context variable type is created. The system assigns this name automatically based on the Label name entered, for example sales_segment.
Code	System-generated alphanumeric number based on the label name.
Context type	Option that indicates from where the context is retrieved. Select one of the following: ○ Transaction Header: Context is fetched from the header record for a transaction, such as an opportunity, quote, or sales order. ○ Transaction Line: Context is fetched from the line record for an opportunity, quote, or sales order transaction.
Application	Name of the application scope. The default scope is Global.
Active	Option that indicates the context variable is available for use in pricing matrices.

5. Select **Save**.
The tab (related list) for the **Type** that you selected in Step 4 and the **Variable Mapping** tab are displayed.
6. Depending on the **Type** you selected, create the values for the type, then select **Save**.
For example, in Step 4, if you selected the Choice type, select **New** in the **Choices** tab and define the choices.

What to do next

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

Map a custom context variable to a transaction entity

Associate a custom pricing context variable to a particular transaction entity type in Sales and Order Management.

Before you begin

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

Role required: admin

Procedure

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

Lead to Cash Entity Attribute form

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

5. Select **Save**.

Result

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

Use extension points in Pricing Management

Use extension points to call custom scripts that obtain pricing information from external sources or override certain default pricing features with custom implementations. You can use this pricing information in the Pricing Management application for Sales and Order Management.

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

Pricing Management extension points

Extension point	Description
<code>sn_csm_pricing.AttributeAdjustmentCustomize</code>	Customize the logic that determines the attribute adjustments for a product offering.

Pricing Management extension points (continued)

Extension point	Description
	You can extend the pricing engine logic without using the Attribute Adjustment table to fetch the adjustment values.
<code>sn_csm_pricing.CostExtensionPoint</code>	Customize the logic for determining the unit cost for product offerings instead of relying on default logic to fetch costs from Cost Book.
<code>sn_csm_pricing.DefaultPriceListExtensionPoint</code>	Change the selection logic for default price lists. You can use this extension point to customize the default price list logic that is used by the calling SOM applications such as Quote Management or Order Management. This extension point changes the default logic for both the header and line of the calling application. Note: If you want to create additional context variables, use the Price List Defaulting Matrix to manage the price list default at the header level. Use this extension point only for use cases that can't use the Price List Defaulting Matrix. In this case, the request contains values for all the context variables, in addition to the default context variables.
<code>sn_csm_pricing.ListPriceExtensionPoint</code>	Customize the logic for determining a base list price. Enables you to extend the pricing engine logic and not rely on a price list and price list line to fetch the base list price.
<code>sn_csm_pricing.PricingAdjustmentsExtensionPoint</code>	Customize the pricing engine logic that determines price adjustments for a product offering without using the Standard Adjustment and Component Configuration Rule Matrices.

Exporting and importing pricing entities

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

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

Export and import process for pricing entities

Follow these steps to export and import pricing entities.

Export and import steps for pricing entities

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

Export pricing entities

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

Before you begin

Role required: sn_csm_pricing_pricelist_administrator

Procedure

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

Note:

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

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

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

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

What to do next

[Import pricing entities.](#)

Import pricing entities

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

Before you begin

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

Role required: sn_csm_pricing_pricelist_administrator

Procedure

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

What to do next

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

Assign user roles in Sales and Order Management applications

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

Overview of roles

Roles define the functions available to you in the Sales and Order Management applications, including:

- Opportunity Management
- Quote Management
- Product Catalog Management
- Pricing Management
- Order Management

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

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

Opportunity Management roles

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

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

Quote Management roles

The roles in the following table apply to Quote Management.

Role	Description
Sales Agent [sn_sales_common.sales_agent]	Identifies, nurtures, and converts quotes into successful sales.
Sales Manager [sn_sales_common.sales_manager]	Assigns quotes to sales agents or sales teams.

Role	Description
Sales Operation Specialist [sn_sales_common.sales_ops_specialist]	Enhances efficiency and accuracy in sales operations. Configures sales processes in sales operations.

Product Catalog Management roles

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

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

Pricing Management roles

The roles in the following table apply to Pricing Management.

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

Granular roles for Pricing Management

As an admin, you can set the following granular roles in Pricing Management.

Granular roles for pricing

Granular role	Description
Price List Writer (sn_csm_pricing.pricelist_writer)	Read, write, and delete access to pricing entities. To delete a pricing entity such as a price list or cost book, the pricing entity must be in Draft state.
Price List Viewer (sn_csm_pricing.pricelist_viewer)	Read access to pricing entities such as price lists, price list lines, cost books, and cost book lines.

Order Management roles

Order Management uses the roles in the following set of tables to control and manage the application features and access to the application. The following roles are explained in this section.

- Order management roles
- Service order management role
- Fallout management

Order management roles

The roles in the following table apply to Order Management.

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

Role	Description
	Note: The Order Approver and Order Viewer roles are included in the Order Management Business Stakeholder role, which has a fee associated with it. Don't assign these roles to users without confirming that your organization has the appropriate entitlement. To learn more, see Activate Business Stakeholder .

Granular roles for fulfillment

As an admin, you can use predefined granular roles to control access to specific features or information. The following predefined granular roles are available for fulfillment.

Fulfillment granular roles

Granular role	Description
Fulfillment Viewer [sn_ind_tmt_orm.fulfillment_viewer]	Role that provides a user with read access to fulfillment tables: order tasks, domain orders, product orders, resource orders, and service orders.
Fulfillment Writer [sn_ind_tmt_orm.fulfillment_writer]	Role that provides a user with read and write access to fulfillment tables: order tasks, domain orders, product orders, resource orders, and service orders. This role includes the Fulfillment Viewer [sn_ind_tmt_orm.fulfillment_viewer] role.

Service order management roles

The roles in the following table apply to Service order management.

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

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

Fallout management roles

The roles in the following table apply to Fallout management.

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

Using Sales and Order Management applications

As agents and managers, you use the CSM Configurable Workspace to complete various tasks when using the Sales and Order Management applications. From the workspace you access product catalogs to see the product offerings available in your organization. You also use the product configurator to create quotes and orders, manage sold products and product inventory, and work on MACD orders.

Using product catalogs

When you start an opportunity, quote, or order, a **Catalog** tab (related list) opens, which provides a visual display of the product offerings available in a catalog.

Product catalog interface

The screenshot displays the Product catalog interface. On the left, a sidebar shows the 'Solana US Catalog' with a dropdown menu for 'Show all' and a list of categories: MultiPlay, Home Automation, Elevators, Connected Car, OTT, and Internet. A red box highlights this sidebar, with an annotation 'Catalog category hierarchy' pointing to it. The main area shows 'Products for "Show all"' with a search bar at the top right, annotated 'Product offering search'. Below the search bar, there are six product tiles: 'Basic Monitoring Plan', 'Connected Car', 'Connected Car Bundle', 'Door Sensor', 'Elevator Maintenance Plan Flex', and 'Home Automation Bundle'. A red box highlights these tiles, with an annotation 'Product offering tiles' pointing to it. Each tile includes an image, a title, a description, and a 'Total' price. The interface also shows a 'Details' tab and a 'Line items' tab at the top.

The catalog view has the following features for selecting products:

- **Catalog navigation tree:** Catalog and a list of its categories used to organize product offerings. Selecting a category filters the display and shows only the product tiles for that category.
- **Search bar:** Option for finding product offerings by product name, code, or description. The search feature displays the product tiles that match the name, code, or search string entered.
- **Product tiles:** Cards that depict each product, which has a product image if available, brief description, and an option to add or customize the product offer. The **Add** option displays when the product is a simple (fixed) product offering. The **Customize** option displays for configurable product offerings that can be tailored for a customer. Selecting **Customize** opens the product configurator for configuring the product offering.

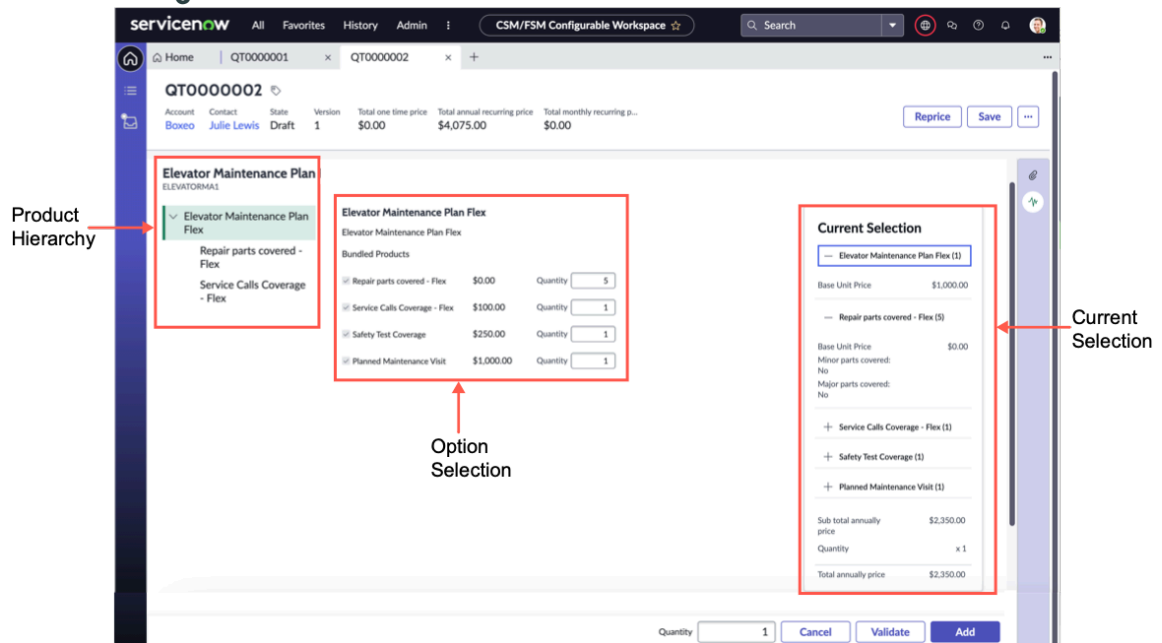
Using the product configurator

The product configurator is an interface for customizing configurable product offers. It displays the product options available and automatically calculates product pricing as you select options.

The interface consists of three main sections:

- **Product hierarchy:** Lists the parent and child product relationships for configurable products.
- **Option selection:** Displays the product options that can be selected, for example product characteristics such as color or model.
- **Current Selection:** Shows the pricing for the options that you select. The pricing is calculated automatically and displayed dynamically as you select product options.

Product configurator



Using Opportunity Management

Use the Opportunity Management to create your opportunity.

The Opportunity Management window has tabs that help you create and manage your opportunities.

Opportunity Management tabs

Opportunity Management Tabs	Description and Link
Details tab	The details of the opportunity like account, sales cycle and stage information.
Catalog tab	The product catalog to add line items to the opportunity.
Needs tab	Add more accurate information about your customer's business requirements to the opportunity.
Line Items tab	Add opportunity line items to a quote.
Competitors tab	Add competitors information to your opportunity.
Tasks tab	Create opportunity tasks.
Emails tab	Create emails to send to the required stakeholders.
Quotes tab	Create quotes directly from the Opportunity tab.

Create an opportunity

Create a new product opportunity in the Opportunity Management application by entering the details, such as account, sales stage, sales cycle type, and deal size.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. In the **Opportunity - All** list, select **New**.
The **Create new opportunity** dialog box opens.
3. Use the following table to fill in the information.
4. Select **Save** to save the opportunity and **Close** to return to the main Opportunities window.
5. Select Refresh  to see the new opportunity in the list.

What to do next

Start adding more information to your opportunity. To learn more, see [Viewing the details of an opportunity](#).

Viewing the details of an opportunity

Use the details tab to add more information about your opportunity including the source and competitor.

Before you begin

Role required: sales_agent

Procedure

1. Select the opportunity that you're working with from the **Opportunity List** window.
2. Fill in all the information on the Details tab.

Opportunity details tab

Fields	Descriptions
Industry	Name of the industry. For example, Telecommunications or Manufacturing or Healthcare or Banking.
Assignment Group	Name of the customer to which the created opportunity is applicable.
Assigned To	Name of the agent to whom the opportunity is assigned.
Lost To	Name of the competitive customer to whom this deal is lost to.
Source	Name of the source this opportunity information is gathered from.
Rating	Rating of the opportunity based on the product demand in the market.
Budget Type	Mention the budget type.
Estimated Closed Date	Estimated date of closing the opportunity.
Actual Closed Date	Actual date of closing the opportunity.
ARR	Annual revenue of the product opportunity.
Opened By	Name of the person who has opened the opportunity.
Created	Date of the opportunity creation.
Price List	Default price list based on the opportunity created.
Total One-Time Price	Total one-time price of the product offering included in the opportunity.
Total Monthly Recurring Price	Total monthly recurring price of the product offering included in the opportunity.
Total Annual Recurring Price	Total annual recurring price of the product offering included in the opportunity.
Note	Any additional information for the opportunity.

3. Select **Save**.

What to do next

Use the Product Catalog tab to add products to your quote. See for more information.

Get product recommendations using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales opportunities.

Before you begin

Role required: sales_agent

About this task

A needs template is a questionnaire that you complete to get product recommendations based on input or requirements that you receive from a customer. The product selection guide lists the needs templates available for a particular catalog.

Procedure

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

2. Navigate to **Opportunity > All**.

- To work on an existing opportunity, select the opportunity.
- To [create an opportunity](#), select **New**.

Immediately after you create the opportunity, a message confirms that the opportunity was created. To continue working on the opportunity, select the link in the message.

The product catalog displays in the Catalog tab of the opportunity.

3. In the Catalog tab, select **Product selection guide** in the catalog hierarchy.
The needs template cards for the guide are displayed.

4. In the needs template card that best matches what your customer wants, select **Capture Needs**.

The questionnaire for the selected template opens.

5. Answer the series of questions.

6. After replying to the last question, review or select the recommendations:

- To review your responses, select the **Edit**  icon. You can change your responses if needed.
- To view product recommendations, choose **Select Recommendations**. The Catalog tab displays the recommended products.

7. Choose a recommendation by selecting **Add** in the tile for the product that best matches your customer needs.

The selected product is added to the opportunity. The Needs tab displays the needs template that you selected. You can review the needs template and if needed, change your answers, which might result in different product recommendations.

Add line items to an opportunity

Create a new product line item for your opportunity by entering the details, such as product offering, quantity, and estimated price.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Line Items** tab.
3. Select **New** to start a new opportunity line item or select an existing opportunity line item to make changes.
4. Fill in the fields in the Opportunity Line Item form.

Opportunity Line Item form

Fields	Descriptions
Number	The system-generated number of the opportunity line item.
Opportunity	The system-generated id of your opportunity.
Product Offering	The product offering that is selected for the opportunity line item.
Unit of Measure	The measuring unit of the opportunity line item.
Quantity	The quantity of the opportunity line item.
Price List	Default price list based on the opportunity created.
Periodicity	Periodicity is based on the selected pricing method. ○ If the pricing method is selected 'One time', the periodicity is set to 'None'. ○ If the pricing method is selected 'Recurring', the periodicity can be set to 'Monthly' or 'Annually'.
Unit List Price	Unit list price of the product offering included in the opportunity line item.
Estimated Unit Price	The estimated unit price of the product offering included in the opportunity line item.
Estimated Total Price	The estimated total price of the of the product offering included in the opportunity line item.
Total One-Time Price	Total one-time price of the product offering included in the opportunity line item.
Total Recurring Price	Total recurring price of the product offering included in the opportunity line item.
Work Notes	Any additional information related to the opportunity line item.

5. Select **Save**.
The Opportunity Line Item is added to the main opportunity.

What to do next

Add a task to your opportunity. To learn more, see [Add opportunity tasks](#).

Add competitors to an opportunity

Capture competitor details for your opportunity so that you can have winning sales conversations with your customer.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Competitors** tab.
3. Select **New** to start a new opportunity competitor or select an existing opportunity competitor to make changes.
4. Fill in the fields in the Opportunity Competitor form.

Opportunity Competitor form

Fields	Descriptions
Company	The company's name that is a competitor.
Opportunity	The opportunity number.
Strengths	Strengths of the competitor.
Weaknesses	Weaknesses of the competitor.

5. Select **Save**.
The competitor information is added to the main opportunity.

Add opportunity tasks

Create opportunity tasks to capture additional details of your customer's requirements.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Tasks** tab.
3. Select **New** to start a new opportunity task or select an existing opportunity task to make changes.
4. Fill in the fields in the Opportunity Task form.

Opportunity Task form

Fields	Descriptions
Number	The system-generated number of the opportunity task.
Opportunity	The opportunity number.
Due date	The date by which the opportunity task has to be completed.
Short description	More information about the opportunity task.
State	State of the opportunity task.
Assigned to	The name of the sales agent to whom the sales manager has assigned this opportunity task.
Work notes	Additional notes about the opportunity task.

5. Select **Save**.

The Opportunity task is added to the main opportunity.

What to do next

You can create appointments in your opportunity tasks. To learn more, see [Create appointments](#).

Create appointments

Create appointments with the required stakeholders to move the business discussion forward for your opportunity.

Before you begin

Role required: sales_manager

About this task

You can create appointments only after creating an opportunity task. To create an opportunity task, see [Add opportunity tasks](#).

Procedure

1. Navigate to **List** view  and select **Opportunity Tasks**.
2. Select the opportunity task you want to work with and select the **Appointments** tab.
3. Select **New** to start a new appointment or select an existing appointment to make changes.
4. Fill in the fields in the Create New Appointment form.

Create New Appointment form

Fields	Descriptions
From	The email id of the sender.
To	The email id of the receiver.
Activity state	The state of the appointment.
Start time	The start time of your appointment.
End time	The end time of your appointment.

Fields	Descriptions
Reminder	The time interval for a reminder.
Subject	The subject information of your appointment.
Location	The appointment location.
Message	Any additional message for your appointment.

5. Select **Save**.

The appointment is added to your opportunity task.

Compose emails

Create an email to communicate to your customer the product information that meets their business requirements or the product demo as required by your customer.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Emails** tab.
3. Select **Compose Email** button from the top right corner to start a new email or select an existing email to make changes.
4. Fill in the fields in the Email Draft form.

Opportunity Email Draft form

Fields	Descriptions
From	Email id of the sender.
To	Email id of the receiver.
Subject	Subject of your email.
Email message	Body details of your email.

Note:

You can create your own email templates and use the pre-filled email templates while creating a new email. To attach any files with your email, select **Attach File**.

5. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.

View an existing opportunity

View an existing opportunity to make changes, such as updating its status or additional details.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
 - All- shows all the opportunities in the instance.
 - Opportunity Tasks- shows your opportunity tasks.
2. Select the opportunity that you're working with.
3. Make updates to the opportunity as needed.
4. Select **Save**.

Track opportunities using Kanban view

Personalize and manage the opportunities information that is most relevant to you and your stakeholders using the Kanban view.

Before you begin

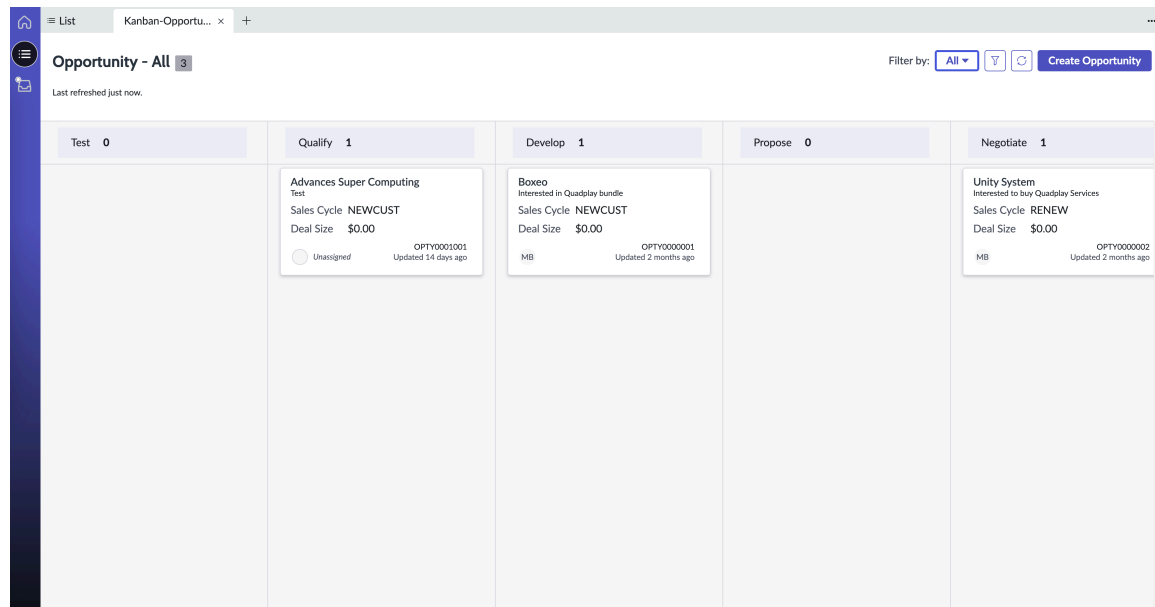
Role required: sales_agent

About this task

A Kanban view is a visual representation of your data that enables users to drag and drop the data records as per the business flow. The Kanban view feature in Opportunity Management provides the following benefits:

- Viewing the opportunities of all stages and filtering them on the basis of sales cycle types.
- Easily updating the state of an opportunity by navigating them in between different stages.

The Kanban view as part of Opportunity Management in Sales and Order Management.



Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
2. Select the **View Kanban** button.

- To change an opportunity state, drag the opportunity card from one state and drop it into another state.
- To view the opportunities of different sales type, use Filter by option on the page.
- To create a new opportunity directly from this page, select **Create Opportunity** button. To learn more, see [Create an opportunity](#).

Export opportunities

You can export an opportunity as a JSON file in Opportunity Management and provide it to a customer. The export opportunity feature in Opportunity Management exports a list of all opportunities.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
2. Select the **Export** button.
3. Select the **File Type**:
 - Excel
 - CVS
 - JSON
 - PDF
4. Select the **Delivery Type**:
 - Email - Enter a valid email address.
 - Download - Downloads the export to a local drive.

The list of opportunities is exported according to the parameters set.

Create a quote from an opportunity

Create a quote directly from an opportunity using the Quotes tab.

Before you begin

Ensure that you have captured and provided all the information for your opportunity, such as opportunity details, line items, competitors information, etc.

Role required: sales_agent

Procedure

1. Navigate to the **List** view  and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Quotes** tab.
3. Select **Create Quote** to create a new quote from the selected opportunity.

Using Quote Management

Use the Quote Management application to build your quote. The window includes the following tabs to help you create and manage product quotes.

The Quote Management window has tabs that help you create and manage your quotes.

Quote Management tabs

Quote Management Tab	Description and Link
Details tab	The details of the quote, such as address and contact information.
Line Items tab	Add quote line items to a quote.
Catalog tab	Agents can use product catalogs to add products to your quote.
Revisions tab	Create multiple versions of quotes.
Customer Orders tab	Convert quotes to product order sales.
Pricing adjustment tab	Adding manual pricing adjustments to products in a quote.

Building quotes

The following table shows the basic steps to creating, building, and managing your quote. Use the links to learn more information.

Building and managing quotes

Steps	Description	Link
1	Create your quote.	See Create a quote and Add details to a quote for more information.
2	Build your quote by adding products from the product catalogs	See Add products to a quote for more information.
3	Select options to products using the product configurator.	See View and update products using the Line Items tab for more information.
4	Add pricing adjustments to quotes.	See View manual pricing adjustments using the Pricing Adjustments tab for more information.
5	Create quote revisions.	See Create quote versions with the Revisions tab for more information.
6	Convert your quotes to customer orders.	See Convert quotes into orders with the Customer Orders tab for more information.

Create a quote

Create a quote in Quote Management to start the quote building process.

Before you begin

Role required: sales_agent

About this task

When you start a quote, a pop-up prompts you for quote information. You can choose to create a quote for a customer account or consumer. The pop-up changes depending on your choice.

- Account – The quote is created for an existing customer account.
- Consumer – The quote is created for an existing consumer.

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes** and select **New**.
3. In the Create new quote pop-up, fill in the fields.
 - To create a quote for an account, select the **Account**.
 - To create a quote for a consumer, select the **Consumer** name.
4. Select **Save and close**.
The quote is saved and you return to the **Quotes** list.
5. Select refresh  to see the new quote in the list.
6. Select **Add Line Items** to save the quote and begin adding quote line items.

What to do next

[Add details to a quote.](#)

Add details to a quote

Use the Details tab to add basic information to a quote.

Before you begin

Role required: sales_agent

About this task

Use the Details tab to add more information about your quote, such as addresses and contacts. You can also indicate whether the quote is active and set the quote state.

Procedure

1. In the Quote list view of the CSM Configurable workspace, select the quote.
2. In the Details tab, fill in the basic information..

Quote Details tab

Field	Description
Active	Option indicating that the current quote is the active quote. When there are multiple versions of a quote, selecting this option indicates this is the active quote.
State	The State drop-down box contains options for tracking the quote status. - Draft - The default state of a quote that indicates the quote is still in development. - In review - Use this state to indicate that the quote is in a review state. - Pending customer acceptance - Set to this state when the quote is created and in review with a customer. - Accepted - Use this state to indicate that the quote was accepted by the customer. - Revised - Revised indicates that changes have been made to the quote that other working on the quote can take note. - Expired - Shows that the quote is beyond its expiration date. Reset the expiration date to make the quote active again. - Canceled - Use this state to show that the quote is canceled. - Closed - Shows that the quote is closed. - Completed - Shows that the quote is completed. When a quote is set to Completed, the quote can be used to create an order. For more info, see Convert quotes into orders with the Customer Orders tab.
Pricing fields	The fields are:

Field	Description
	○ Currency - The currency for the price matches the currency stated in the account information. ○ Price list - The Standard Price List field is the default price list for the product catalogs referenced in the quote. ○ Cost book - The Standard Cost Book is the default cost book for the product catalogs referenced in the quote.

3. Select **Save**.

What to do next

[Add products to a quote](#) vb.

Add products to a quote

Use the Catalog tab in the Quote Management to add products to your quote.

Before you begin

Role required: sales_agent

About this task

You can use the Catalog tab to search for and select product offerings from catalogs and add them to your quote. You can choose simple and complex product offerings. Complex product offerings are configurable with options that you select using the product configurator.

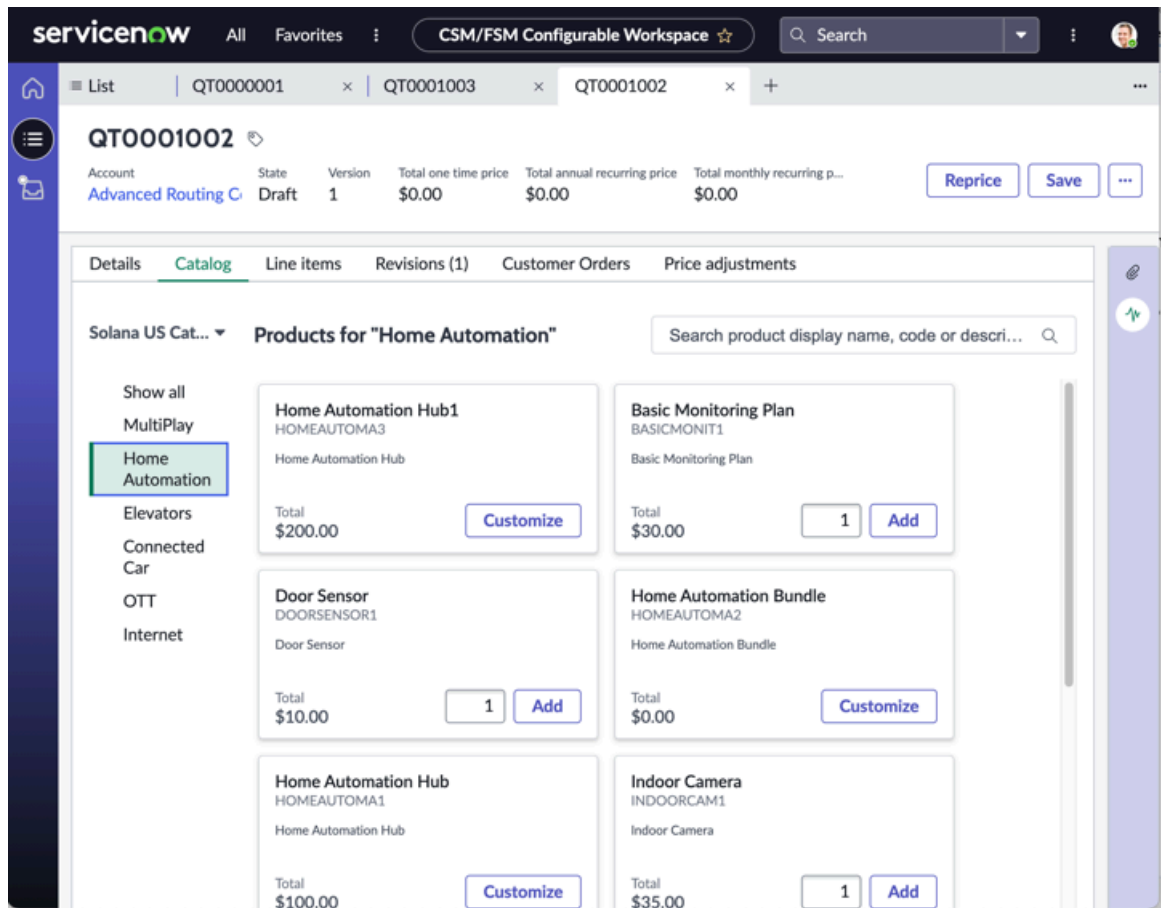


Note:

Check your entitlements to see if the product configurator is available.

Procedure

1. In the Configurable Workspace, select the **List** view .
2. Navigate to **QuoteAll-Quotes** and select the quote that you want to work with.
3. Select **Catalog**.

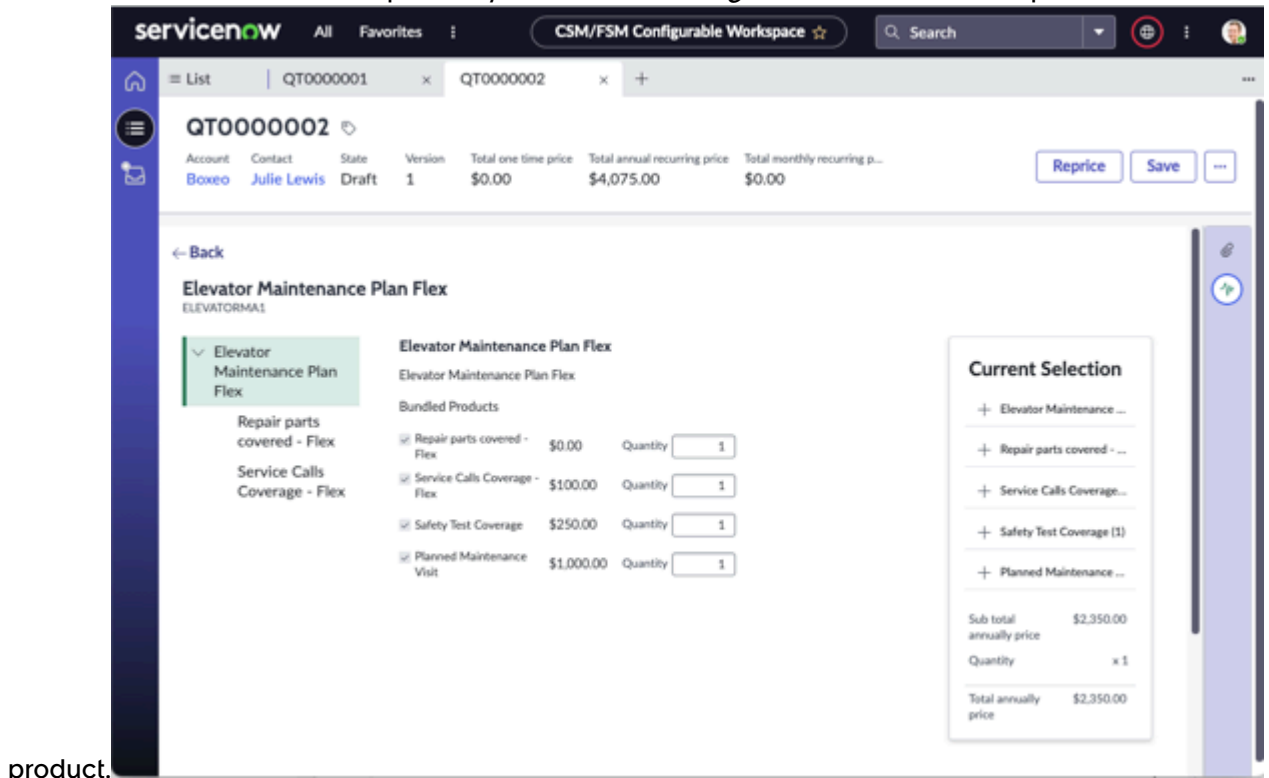


4. Use the following table to learn about the functionality of the **Catalog** tab.

Catalog tab

Element	Description
Product catalog hierarchy	This option selects the product catalog.
Customize button	The Customize button appears on cards for configurable product offerings. Selecting the Customize button opens the product configurator.
Add button	The Add button adds the product to the quote. The Add button appears for simple products that don't have any selectable options.
Search field	Use the search field to search for a product in the product catalog hierarchy selected.

5. Use the **Customize** button to open the *product configurator* and choose options for a



product.

Product configurator

product configurator	Description
Option fields	Option that lets order agents select product options.
Reprice	Option that recalculates all pricing and removes manual pricing adjustments.
Save	Option that saves your selections and updates the pricing window.
Pricing window	Pricing window that shows selected options, option pricing, and total pricing. Select the plus sign to see more information about each option selected.
Validate	Option that validates the selections made in the product configurator.
Add	Adds the product offering to the quote.

6. Select **Add**.

The product offering is added to the quote as a **Line Item**.

What to do next

[View and update products using the Line Items tab.](#)

View and update products using the Line Items tab

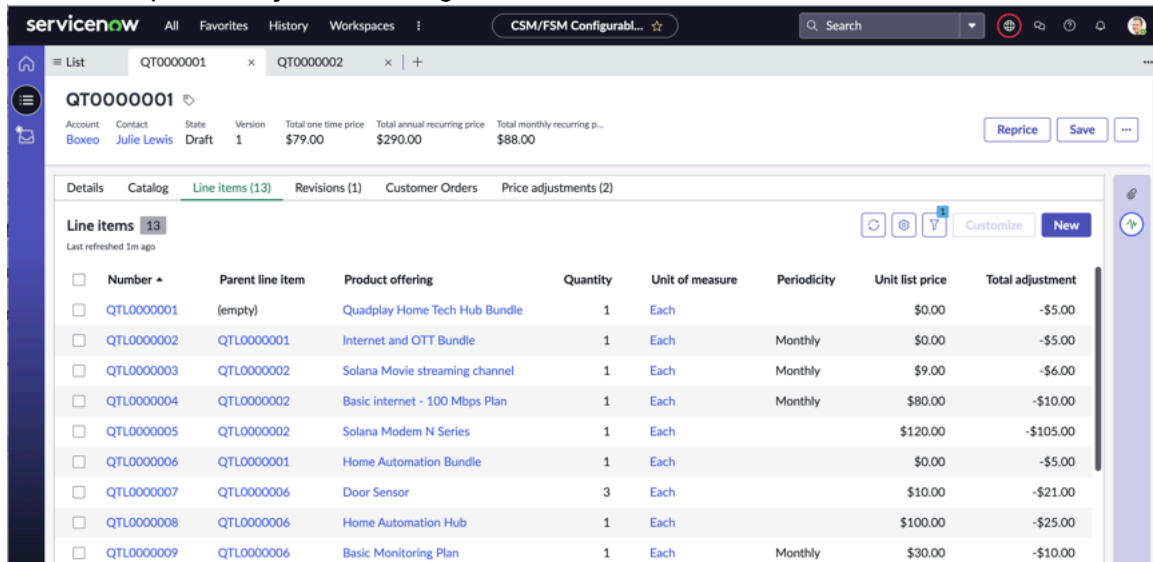
Use the Line Items tab to review and update products in your quote and to add additional line items.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view  and select **All Quotes**.
2. Select the quote that you're working with and select the **Line Items** tab.



3. Select **New** to start a new quote line item or select an existing quote line item to make changes.
4. Fill in the fields in the Quote Line Items.
5. Select the Quote Line Characteristics tab to add or modify the quote characteristics.
6. Select the **Pricing Adjustment** tab to add or modify a manual pricing adjustment to the quote line item.
7. Select **Save**.
The Quote Line Item is updated to the main quote.

What to do next

Add a pricing adjustment to a quote line item. See [View manual pricing adjustments using the Pricing Adjustments tab](#) for more information.

Add pricing adjustment to a quote line item

Add pricing adjustments to quote line items after the line item is created. Pricing adjustments can help support customers as they work through the quote building process.

Before you begin

Role required: sales_agent

About this task

Pricing adjustments for quote line items are a way to incentive customers as they move through the quote process. Sales agents have the following price adjustment options.

Pricing adjustment types

Adjustment Type	Description
Markdown %	Percentage for a markdown in price.

Pricing adjustment types (continued)

Adjustment Type	Description
Markdown amount	A dollar amount of a markdown in price.
Markup %	Percentage for the markup in price.
Markup amount	A dollar amount for a markup in price.
Price Override	Overrides the product price with a new price.

Procedure

1. Navigate to the **List** view  and select **All Quotes**.
2. Select the quote line item for a pricing adjustment.
3. In the adjustment dialog, use the Adjustment type menu to select an adjustment type.
4. Enter an adjustment value in the Adjustment value.
5. Add a description of the price adjustment.
6. Select **Save**.

What to do next

Update product characteristics. See [Update product characteristics](#) for more information.

Update product characteristics

Use the Quote Characteristics tab to make updates to product characteristics.

Before you begin

Role required: sales_agent

About this task

After a quote line is created, it may be necessary to change product characteristics as the quote is negotiated with a customer. Product offerings with customizable options can be updated as the quote evolves.

Procedure

1. Navigate to the **List** view  and select **All Quotes**.
2. Select the line item for the product characteristic change.
3. Select the Quote Line Characteristics tab.
4. Select the quote characteristic you want to update.
5. Make the characteristic change and select **Save**.

What to do next

Create multiple quote revisions. See [Create quote versions with the Revisions tab](#) for more information.

Create quote versions with the Revisions tab

Use the revisions tab to view all the versions of your quote and to create versions.

Before you begin

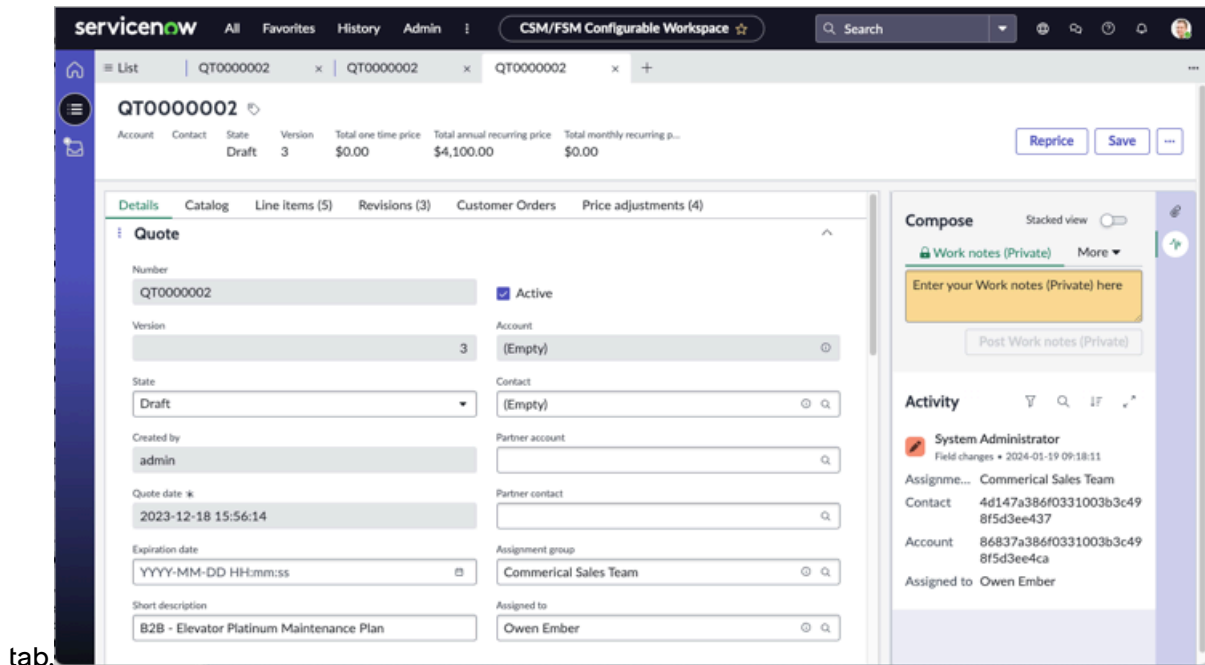
Role required: sales_agent

About this task

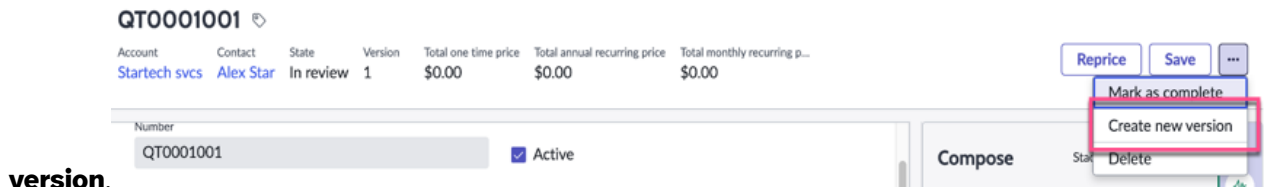
You can create revisions of a quote by using the Revisions tab. All the quote versions are listed. The active quote shows a check in the Active check box.

Procedure

1. Navigate to the **List** view  and select **All Quotes**.
2. Select the quote that you're working with.
3. Select the **Revisions**



4. Select the **More Actions**  button and select **Create new**



version.

A new version of the quote is created. Select to quote in the message to open the new version. Versions numbers are sequential. The Active check box is checked for the active quote. See the Revisions tab for a list of all current versions of a quote.

5. Return to the **Quote list** window and refresh to see the latest version created.
6. Select the **Active** check box as a reminder of the active quote.

What to do next

Use the Customer Order tab to start an order from the Quote. See [Convert quotes into orders with the Customer Orders tab](#) for more information.

Convert quotes into orders with the Customer Orders tab

Use the Customer Order tab to convert a quote into a customer order in Quote Management.

Before you begin

Role required: admin

About this task

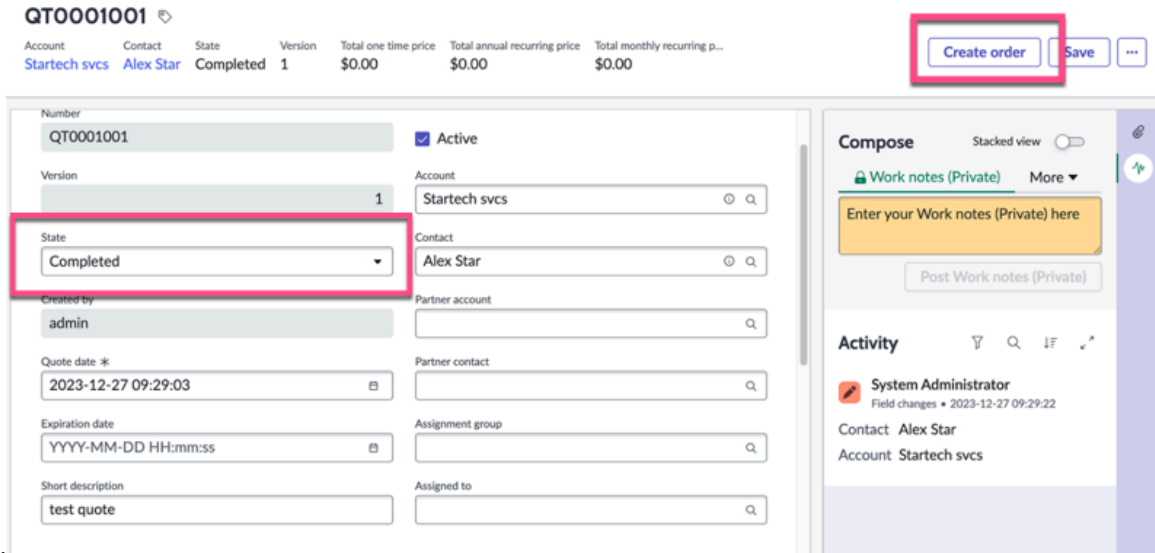
The quote must be in an Active state and the quote state must be set to Complete. Then the Customer Orders tab becomes active.

Note:

Verify your entitlements to see if you have access to this feature.

Procedure

1. Navigate to the **List** view  and select **All Quotes**.
2. Select the quote that you want to convert to a customer order with from the **Quote List** window.
3. Change the Quote State to **Complete** and select



QT0001001

Account: Startech svcs, Contact: Alex Star, State: Completed, Version: 1, Total one time price: \$0.00, Total annual recurring price: \$0.00, Total monthly recurring p...: \$0.00

Number: QT0001001, Version: 1, State: Completed, Active: ☒

Account: Startech svcs, Contact: Alex Star, Partner account: , Partner contact: , Assignment group: , Assigned to:

Created by: admin, Quote date: 2023-12-27 09:29:03, Expiration date: YYYY-MM-DD HH:mm:ss, Short description: test quote

Buttons: Create order, Save, ...

Compose: Work notes (Private), Enter your Work notes (Private) here, Post Work notes (Private)

Activity: System Administrator, Field changes • 2023-12-27 09:29:22, Contact: Alex Star, Account: Startech svcs

Save.

4. Select the **Create Order** button.
When the order is created, a message appears with the order number.
5. Select the Order number in the message to open the order.
The **Order Line Item** window opens showing the order line items, pricing adjustments, and order tasks.

View manual pricing adjustments using the Pricing Adjustments tab

Use the Pricing Adjustments tab Quote Management to view and update manual pricing adjustments made to order line items in your quote.

Before you begin

Role required: sales agent

About this task

To create a pricing adjustment, see [Add pricing adjustment to a quote line item](#).

Procedure

1. Navigate to the **List** view  and select **All Quotes**.
2. Select the quote that you want from the **Quote List** window.
3. Select the **Pricing Adjustment** tab.
4. Select the price adjustment line item that you want to update.
5. Make the pricing adjustment.

6. Select **Save.**

The pricing adjustment is updated and reflected on the overall quote pricing field.

View an existing quote

View existing quotes to update the quote status or make other changes.

Before you begin

Role required: sales_agent

Procedure**1. Navigate to the **List** view and select **All Quotes**.**

- All Quote- shows all the quotes in the instance.
- My Quotes- shows your quotes.
- My Teams Quote- shows the team quotes.

2. Select the quote that you're working with.**3. Make updates to the quote as needed.****4. Select **Save**.****Export quotes**

Export a list of quotes in Quote Management and provide it to a customer.

Before you begin

Role required: sales_agent

Procedure**1. In the CSM Configurable Workspace, select the **List** view.****2. Navigate to **Quotes > All**.****3. Select **Export**.****4. Select the **File Type** to be exported:**

- Excel
- CSV
- JSON
- PDF

5. Select the **Delivery Type:**

- Email - Enter a valid email address.
- Download - Downloads the export to a local drive.

6. Select **Export.**

The list of quotes is exported according to the parameters set.

Using Sales Agreement Management

Learn how managers, agents, and administrators use the Sales Agreement Management application to generate sales agreements from quotes.

To create a sales agreement from a quote, the following conditions must be met:

- Make sure that the selected quote is not converted to another sales agreement. You cannot create multiple sales agreements from a single quote.
- The quote is in a closed or complete state.
- A sales agreement can be created from a quote that is for an account, not a consumer.

The Sales agreement window has the following tabs that help you create and manage your sales agreement.

Sales agreement tabs

Sales agreement tabs	Description
Details	Details of the related quote, start and end date of the agreement, and so on.
Sales Agreement Line	Details about the product and the services agreed between the buyer and the seller.
Order	Displays the list of all the orders placed with the current sales agreement.
Price List	Details about the account and currency that is updated from quote header. In the Price List Line table, you can view the actual pricing details about the products and services from the related quote.

Create a sales agreement

Create a sales agreement from a quote between a buyer and a seller for future transactions.

Before you begin

Role required: sn_csm_pricing.pricelist_manager and sn_sales_common.sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Quote > All-Quotes** and select the quote to create a new sales agreement.
3. Select **Create sales agreement**.
The Quote must be in a Completed state for the **Create sales agreement** button to appear.
4. In the Create sales agreement dialog box, enter the start and end date of the agreement in the **Agreement start date** and **Agreement end date** fields.
5. In the **Short description** field, enter the details about the agreement.
6. Select **Create**.
A sales agreement is created. The message displays the sales agreement number.
7. Select the sales agreement number.
The new sales agreement is displayed. The price list created for this new sales agreement is referred in the Default price list field.

What to do next

An order can be placed in the Order Management application based on sales agreement.

Using Order Management

You can manage and fulfill customer orders and service orders in the Order Management application.

Action types for orders

The Order Management application supports the following types of customer and service orders.

Order action types

Order action type	Description
Add	Add a customer order that is not associated with an existing order from the same customer.
Change	Change an existing order, which changes a previously ordered or fulfilled product or service.
Delete	Deletion of an existing customer order line item or product order.

[store-future: BEGIN review]To learn about the different types of orders that you can manage in the ServiceNow AI Platform, see the following:

- [Order Management data model](#)
- [Action types for customer and service order management](#)
- [Creating, changing, and cancelling manual product orders](#)
- [Reviewing customer \(product\) orders](#)
- [Reviewing service orders](#)

[End]

Methods for capturing orders

You can capture customer (product) and service orders from the following sources:

- Your agents can capture customer and service orders using the CSM Configurable Workspace.
- If you have a Telecommunications Service Management subscription, you can capture orders from the following:
 - Third-party order management systems through the Product Ordering Open (TMF622) or Service Order Open (TMF641) APIs.
 - Through the Service Exchange in the San Diego and later releases.

Create an order in Order Management

Create a product or service order in Order Management.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task

When you start an order, a pop-up prompts you for order information. You can choose to create a product order for a customer account or consumer. The pop-up changes depending on your choice.

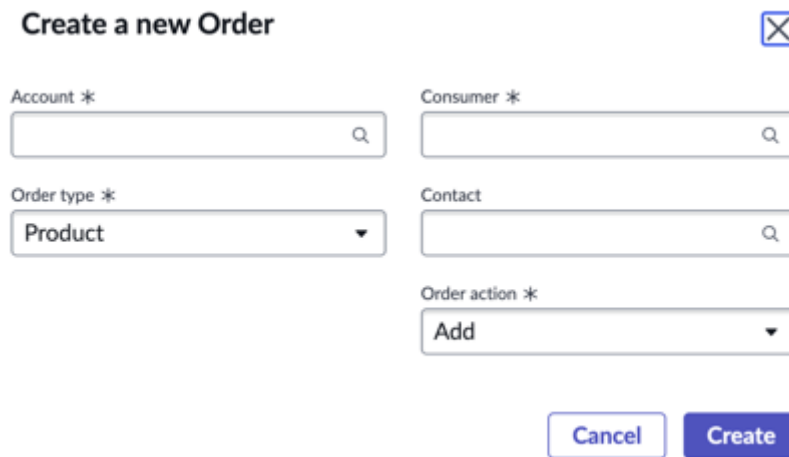
- **Account** – The order is created for an existing customer account.
- **Consumer** – The order is created for an existing consumer.

Note:

The following steps explain how to create a customer order. Whether you're creating a customer order or a service order, the steps are the same.

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All** and select **New**.
The **Create a new Order** pop-up opens.



Create a new Order ✕

Account *

Consumer *

Order type * Product

Contact

Order action * Add

Cancel Create

3. In the **Create a new Order** pop-up, fill in the fields.
 - To create an order for an account, select the **Account**.
 - To create an order for a consumer, select the **Consumer** name.
4. Select **Create**.
The order is started and the **Order Catalog** opens.

Related topics

[Add products or services to an order in Order Management](#)

Add products or services to an order in Order Management

Once an order is started, add products or services to the order using the product catalog and product configurator in Order Management.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task

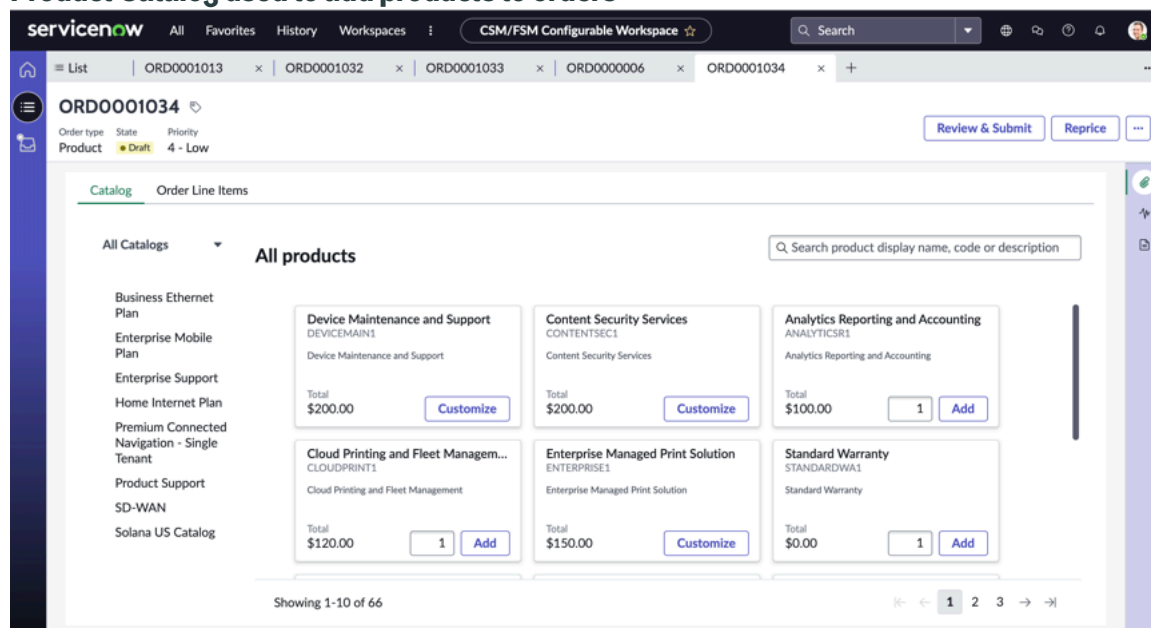
Add products and services to your order in Order Management using the product catalog and product configurator.

Note:

Check your entitlements to see if the product configurator is available.

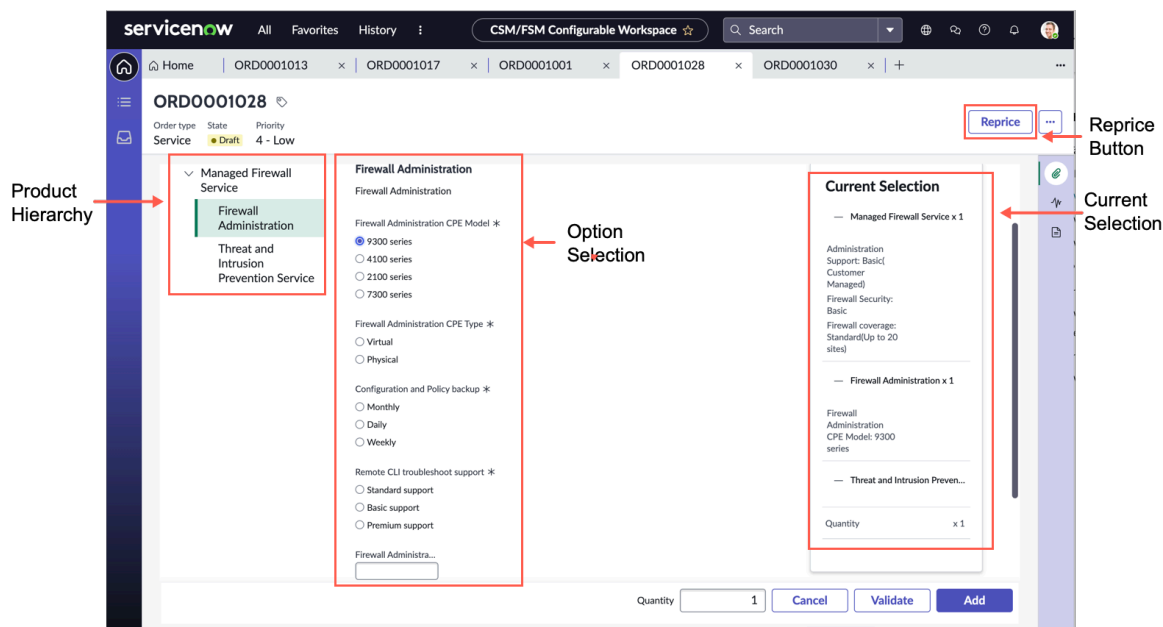
The product catalog shows tiles that contain product information. Simple products have an **Add** button that adds the product to the order with no options available.

Product Catalog used to add products to orders



Products with options have a **Customize** button that opens product configurator that lets agents select product options.

Product configurator used to select product options



The product configurator consists of three columns. The Product Hierarchy column displays product catalog items and child products associated with the product. The Option Selection column shows any available options for the product or service and order lines and order tasks. The Current Selections column shows the products options selected and the pricing.

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select your order.
4. Select **Add** to add a simple product (product with no options) to your order.
5. Select **Customize** to add products that have options.
The **Customize** button opens the product configurator that lets you choose available options for the product or service. The following table explains the product configurator options.

Product configurator form

Field	Description
Product Hierarchy	Field shows the hierarchy of the catalog items and includes parent level products and child level products.
Options Selection	The field displays the options available for the product.
Current Selection	The field lists the selected products with pricing.
Reprice Button	The button resets the pricing and updates the total price when changes are made.
Validate Button	The button validates the product and prices when changes are made.
Add Button	The button adds the product to the order.

6. Select **Add** to add the product to your order.
The product or service is added to the order as an order line item.
7. Select the **Order Line Item** tab to view products and services in your order.

Related topics

[Set up and review product order lines in Order Management](#)

Set up and review product order lines in Order Management

Once products and services are added to an order in Order Management, you can set up order lines with order characteristics, pricing adjustments, and other items.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task

About this task

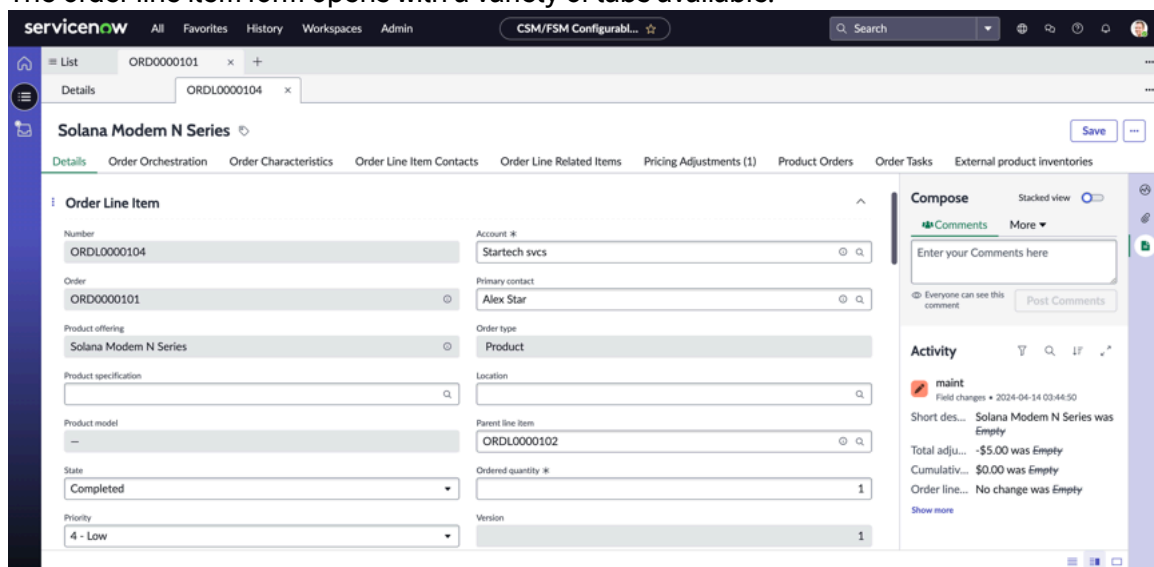
Product and service order lines items contain the product or service that you have added to your order. You can also make the following changes and updates to the order line items.

- Details - shows the details of the order including the name and address fields for the order.
- Order Orchestration
- Order Characteristics - add characteristics to a product and service orders.
- Order Line Item Contacts - add a contact for each product order line item.
- Order Line Related Items - connect this order line item with other order line items

- Pricing Adjustments - add pricing adjustments to a product order.
- Products Orders - lets agents create product orders and add them to the current order.
- Order Tasks - tasks that are assigned to complete the orders.
- External product Inventories - connect to external product inventories.

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select the order that you're working with.
4. Select the order line tab and choose the order line item that you want to update.
The order line item form opens with a variety of tabs available.



5. Select the tab that you want and fill in the fields.

Field	Description
Details	Details include shipping address and product information. Details tab also contains pricing, general information, and contract start and end dates.
Order Orchestration	Open this tab to see the steps needed to execute the order.
Order Characteristics	Characteristics are the options available.
Order Line Item Contacts	Add contacts that enable agents to find more information about an order.
Order Line Related Items	Connect this order line item with other order items.
Pricing adjustments	Agents can adjust product pricing.
Product Orders	Shows the product orders that are part of this order. Also lets agents add products to the order.
Order Tasks	Shows order tasks that must be completed.

Field	Description
External Product Inventories	Agents can view external product inventories.

6. Select **Save** to save the changes to the order line.

Related topics

[Review and submit a product or service order in Order Management](#)

Review and submit a product or service order in Order Management

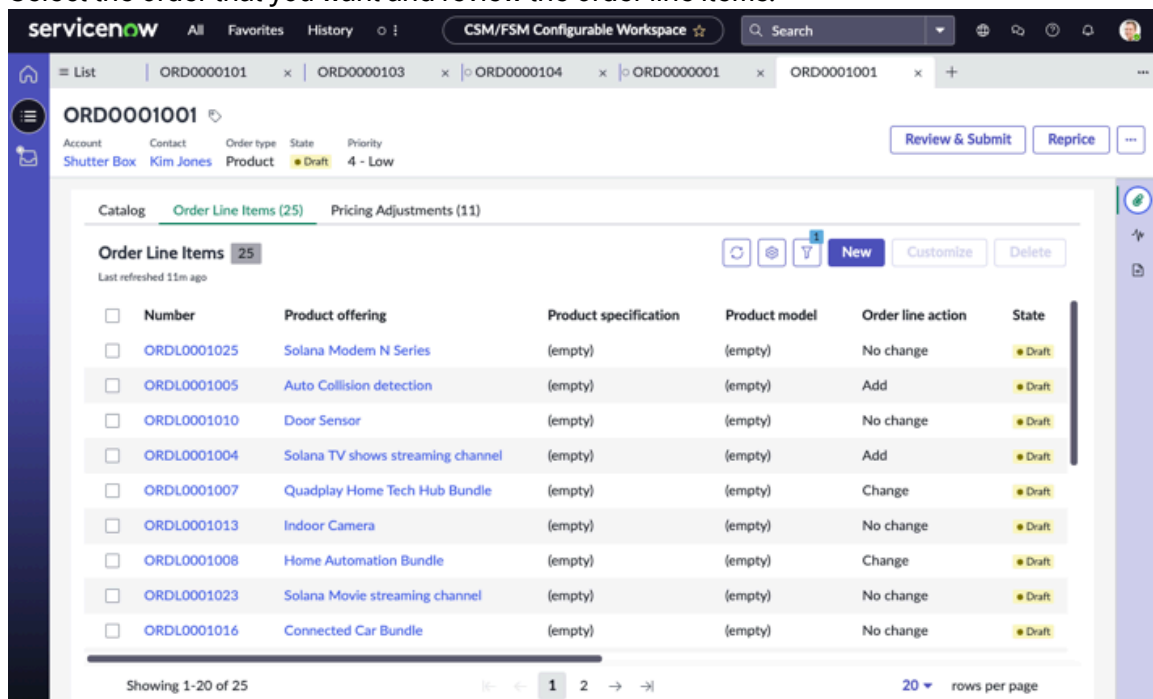
After adding products and services to your order, review the order line items and submit the order for approval.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select the order that you want and review the order line items.



The screenshot shows the ServiceNow CSM/FSM Configurable Workspace. The top navigation bar includes 'All', 'Favorites', 'History', and a search bar. The main content area displays the 'ORD0001001' order details. The 'Order Line Items' tab is selected, showing a list of 25 items. The list includes columns for Number, Product offering, Product specification, Product model, Order line action, and State. The items are currently in 'Draft' state. The interface includes a search bar, navigation tabs, and a 'Review & Submit' button.

Number	Product offering	Product specification	Product model	Order line action	State
ORDL0001025	Solana Modem N Series	(empty)	(empty)	No change	Draft
ORDL0001005	Auto Collision detection	(empty)	(empty)	Add	Draft
ORDL0001010	Door Sensor	(empty)	(empty)	No change	Draft
ORDL0001004	Solana TV shows streaming channel	(empty)	(empty)	Add	Draft
ORDL0001007	Quadplay Home Tech Hub Bundle	(empty)	(empty)	Change	Draft
ORDL0001013	Indoor Camera	(empty)	(empty)	No change	Draft
ORDL0001008	Home Automation Bundle	(empty)	(empty)	Change	Draft
ORDL0001023	Solana Movie streaming channel	(empty)	(empty)	No change	Draft
ORDL0001016	Connected Car Bundle	(empty)	(empty)	No change	Draft

4. Save any changes or updates and select the **Reprice** button to reset the total pricing.

5. Select **Review & Submit** to move the order to the ready for approval state.

The **Review order** window shows all the order line items and also shows total pricing if

The screenshot shows the ServiceNow interface for reviewing an order. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', and a search bar. The main header displays the order ID 'ORD0001001' and its status 'Draft' with a priority of '4 - Low'. Below this, a table lists the order line items:

Product Name	Product Specification	Qty	Recurring price	One time price
Auto Collision detection (ORDL0001005)	-	1	\$ 250 (Annual)	\$ 0
Solana TV shows streaming channel (ORDL0001004)	-	1	\$ 8 (Monthly)	\$ 0
Quadplay Home Tech Hub Bundle (ORDL0001007)	-	Action change	\$ 0	\$ 370
Solana Modem N Series (ORDL0001025)	-	Action nochange	-	-
Door Sensor (ORDL0001010)	-	Action nochange	-	-

At the bottom, the total pricing is summarized:

Monthly recurring total	\$ 326	Annual recurring total	\$ 900	One-time total	\$ 370

applicable.

6. After reviewing the order, select **Submit**.

The state of the order changes from **Draft** to **Submitted** and becomes available to the product manager to review and approve.

Related topics

[Approve a product or service order in Order Management](#)

Approve a product or service order in Order Management

When an order is submitted, the next step is to review the order and approve it. Approved orders are ready to begin the fulfillment process in Order Management.

Before you begin

Role required: sn_ind_tmt_orm.order_approver

Procedure

1. In the **Configurable Workspace**, select the **List**  view.
2. Navigate to **Customer Orders > All**.
3. Select the order that you to review and approve.
Orders ready for approval are in a **Submitted** state.

4. Fill in the fields in the **Approval** form.

Order approval form

	Description
Approve button	Approve orders using the Approve button. The order is updated to a Complete state and enters fulfillment.
Reject button	This button rejects the order, which changes the order state to Rejected . Rejected orders are made available to order agents to make changes and updates.
Reprice	Recalculate prices using the Reprice button when updates are made to the order line items.
View order timeline	To view the order timeline, select Timeline .
View order orchestration	Opens the Order Orchestration form, which is a visual reference to the steps needed to fulfill the order.
New	To add a new order line to the existing order, select New .
Revise item	Make changes to order line items by selecting the Revise item button.
Delete	To delete an order line item, select Delete . The line items are deleted and the prices are recalculated.

5. Select **Approve**.

The order is approved and the order state changes to **Complete**.

[store-future: BEGIN review]

Creating, approving, and fulfilling customer (product) orders

Learn how customer orders (also referred to as product orders) are captured, and how your fulfillment managers and agents review, orchestrate, and fulfill them. By using this process, you ensure that customer orders are correct and handled efficiently throughout the entire fulfillment process.

Customer order direct entry

Agents can capture orders directly using the CSM Configurable Workspace.

Order capture using the Product Order Open API

If you are using the Order Management for Telecommunications, Media, and Technology application, you can process customer orders from third-party customer order management systems by using the Product Order Open API. The Product Order Open API is a ServiceNow implementation of the TMF622: Product Ordering Management API specification. To learn more, see [Product Order Open API](#).

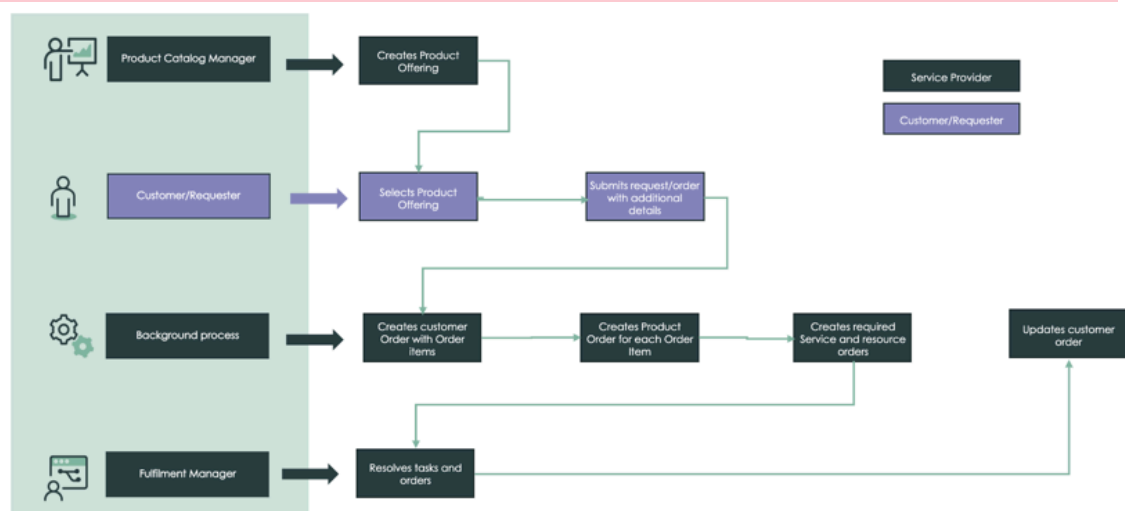
Post-capture customer order record generation

When you capture or directly enter a customer order, a customer order record is generated in the ServiceNow AI Platform. A customer order record has one or more associated customer order line items that describe a product and the action (Add, Change, Disconnect) to perform any required service for the item. A customer order record also contains the following elements.

- The details of the product being added, updated, or deleted.
- For an Add new product, the order line item holds the details of the product specification, with its required characteristics and characteristic values.
- For Change and Disconnect customer orders, the order line holds the details of the product inventory that you're updating or disconnecting.
- The order line item can have a location and related information such as customer contacts detail.

The following diagram shows what happens when a customer order is captured and then fulfilled.

Customer and service order management

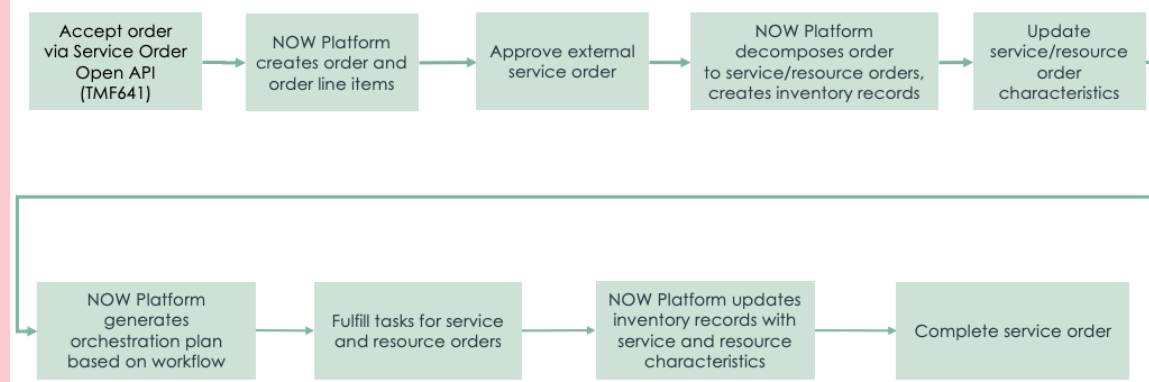


Customer order review, approval, and decomposition

After your agents capture or enter a customer order, the order fulfillment manager selects it in the CSM Configurable Workspace, verifies the following information, then approves or rejects it for fulfillment:

- Customer order
- Order line items
- Order characteristics

Customer order fulfillment workflow example using the Service Order Open API



If the order fulfillment manager rejects a customer order, the following process occurs:

- The state of the customer order moves to **Rejected**.
- A customer order may require several changes to bring it back to a normal state. The order fulfillment manager makes the suitable changes to the product specification characteristics and other information, and can then attempt to approve the customer order.

If the order fulfillment manager approves a customer order, the following process occurs:

- The **State** field changes to **In Progress**.
- Customer order decomposition takes place. It is based on the product specification, service specification, resource specification, specification relationships, and decomposition rules in the product catalog. It creates all required domain product, service and resource orders for each approved customer order line item, and then triggers the order fulfillment workflow for each domain order.

Note:

To learn more about customer order management roles and the approval process, see the following:

- [Assigning order fulfillment and provider roles](#)
- [Create specification relationships and decomposition rules](#)
- [Approving and fulfilling customer \(product\) orders](#)

Product model generation

The ServiceNow AI Platform internally generates a product model record for each unique configuration of a specification, if one does not exist, for use in the fulfillment process. A product model represents the characteristic options that are selected for the ordered product. The product model is generated when an order has completed the fulfillment process.

Processing customer orders submitted through Service Exchange

If the order originated directly from a customer instance through Service Exchange, additional specialized processing takes place:

1. When a customer requests a catalog item from the service catalog, the following occurs:
 - a. A request and request item are generated in the customer's instance.
 - b. A customer order and customer order line items are generated in the provider's instance.

Note:

To learn more about Service Exchange, and using service catalogs and requesting catalog item from the service catalog, see:

- [Service Exchange \(legacy\)](#) 
- [Service Catalog](#) 

2. The order data synchronizes on both the customer's and provider's instances, enabling agents using both instances to track its progress.
3. When your order fulfillment manager approves the customer order, a message appears in your instance stating that the customer's instance has been updated accordingly.
4. After the customer order is complete, work notes are updated on the enterprise customers instance.
 - These notes enable your customer to view the status of the order from their own service catalog.
 - Any status updates in the order are automatically synchronized to the enterprise customer's instance.

Related topics

[Order Management](#)

[Install and configure Order Management](#)

[End]

[store-future: BEGIN review]

Creating, changing, and canceling manual product orders

With order capture, your order agents can directly enter customer (product) orders and service orders into the ServiceNow AI Platform. They can also create multi-site product and service orders with one or more products and services on behalf of your customers. Order capture is supported in the San Diego release and later releases.

Note:

To learn more about creating service orders in order capture, see [Creating orders for new services, service changes, or disconnections](#).

Order capture for a direct order entry

Your agents can capture orders by doing the following:

- Create manual orders for standard products and services with pricing.
- Create manual product and service orders with additional products and services that have been identified as customer needs during order fulfillment.

Creating a manual product or service order involves the following steps:

1. The agent selects and configures the product offering and service specifications and then perform reviews before submission.
2. The agent submits the order.

The ServiceNow AI Platform creates a product or service order record to manage the order fulfillment. A product or service order has one or more associated order line items that describe the product purchased or the services being performed.

3. To review or modify a product or service order after submitting it, agents use the same procedures for all other orders, regardless of their origin. To learn more, see the following:
 - [Reviewing customer \(product\) orders](#)
 - [Reviewing service orders.](#)
4. After the order fulfillment managers or service managers complete their order review, they can approve (or reject) the order for fulfillment by order fulfillment or service agents. To learn more about reviewing and fulfilling customer or service orders, regardless of their source of origin, see the following:
 - [Approving and fulfilling customer \(product\) orders](#)
 - [Approving and fulfilling service orders](#)

Note:

If you're using the Order Management for Telecommunications, Media, and Technology application, many customer (product) and service orders that you process in the ServiceNow AI Platform can be automatically captured from the following sources:

- From third-party order management systems through the Product Ordering Open (TMF622) or Service Ordering Open (TMF641) APIs.
- From the ServiceNow instances of your customers through the Service Exchange application in the San Diego and later releases.

Related topics

[Product Order Open API](#) 

[Service Order Open API](#) 

[End]

[store-future: BEGIN review]

Order a new product

Use Order Capture to create a product order, also known as a customer order, for your customers or internal personnel.

Before you begin

Complete the following configuration tasks before you use Order Capture:

1. Assign order fulfillment and provider roles to your users.
2. Define and publish your product offerings and customer-facing service specifications.
3. Configure order fulfillment.

To learn more, see [Install and configure Order Management](#).

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

Here's how a product order is created:

1. In the Create Order form, you select the **Product** order type and then select a customer account and contact.
2. In the Select Products form, you select one or more product offerings and destination locations for the product order.
3. In the Configure Products form, you configure the ordered products for each order line item. You then apply those product configurations to one or more locations and then configure the ordered product configurations by location.
4. In the Review Order form, you review and submit the product order.
5. An order fulfillment manager can now review and approve it for fulfillment. To learn more, see [Approving and fulfilling customer \(product\) orders](#).

When you directly enter a product order, it creates a customer order record in the ServiceNow AI Platform to manage customer order fulfillment. A product order has one or more associated order line items. The order line item describes a product and the action (Add) that is required for the service. An order line item also consists of the following:

- The details of the product being added, updated, or deleted.
- For an Add new product, the order line item holds the details of the product specification with the required characteristics and characteristic values.
- The order line item can have a location and related information, such as the customer contacts details.

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Access Order Capture from the **Configurable Workspace Lists** tab.
3. Depending on whether you are creating an order for an existing customer account, or first creating a customer account before you create the order, you can select one of the following actions.

4. When the Choose an order type dialog appears, select **Order a new product** and click **Create**.

Choose and order type dialog

Choose an order type

Order a new product

Order a new service

Change a product

Change a service

Cancel a product

Disconnect a service

Cancel Create

[End]

[store-future: BEGIN review]

Select the customer account and contact

Select the customer account and contact information for the order as the next step in the process to create a product order.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. In the form, fill in the fields.

New Product Order - Create order form

Field	Description
Account	Name of the customer account. Select the account that you are creating a product order for. To filter the customer list and find a specific account, type the first few letters of the customer's name.
Contact	Name of the contact for the order. To filter the customer contact list and find a specific contact, type the first few letters of the contact name.

2. Click **Continue**.

The ServiceNow AI Platform creates a customer order record with a Draft state, but with no order line items. To learn more about the order states, see [Customer order states](#).

[End]

[store-future: BEGIN review]

Select the locations and product offerings for the product order

Select the destination locations and product offerings as the next step in the process to create a product order. You select the customer's destination locations and then add the product offerings that you're selling to the customer for each designated location.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. When the Choose at least one location dialog appears in Select Products, select the destination location or locations that you are delivering products to on this order.

Note:

Alternately, to access the Choose at least one location dialog, in the Locations pane, click **Add Location**.

- a. Place your cursor in the **Locations** field, click the field, and then select a location. The available address selections come from the customer account that you selected in the Create Order form. To filter the customer address list and find a specific location, type the first few letters of the location name.
- b. To select another location, place your cursor to the right of the previous selection and then select another one.
- c. To remove a selected location, click **X**.
- d. Click **Add**.

The selected destination locations for the order appear in the Locations pane. To add another location, or delete a previously selected location, do the following actions:

2. In the Locations pane, select the location that you want to deliver a product offering to, and then add the location contact, product offerings, and order quantities for the location:
 - a. In the Location Contact section, optionally enter the first name, last name, email address, and mobile number for the contact person for the selected location. This information creates a line item contact record.
 - b. In the Product Offerings section of the Select Products pane, do the following actions for the selected location:
 - In the **Offerings** field, select the product offerings you are delivering the location.
 - In the **Quantity** field, enter an order quantity for each of the product offerings.

Select Products - Product offerings

Field	Description
Offerings *	Published product offering that the customer is ordering for delivery to the selected destination location. Examples might include Internet Service, all-in-one mobile plans, a Premium SD-WAN Offering, or a Premium Unlimited mobile plan. You can select multiple products to sell for each selected location:

Field	Description
	i. Select a product offering from the list of published product offerings. To filter the product offerings list and find a product offering, type the first few letters of the product name. ii. To select another product offering, place your cursor to the right of the previous selection, and then select another one. iii. To remove a selection, click X.
Quantity *	Quantity of the product that the customer is ordering in the selected location. The default quantity is 1.  Note: To delete a product offering you selected for the order location, click the delete icon ()

- c. To add another product offering for this location, click **Add Product Offerings**, and repeat the process for selecting an offering and entering an order quantity.

3. When you are finished adding product offerings for all locations, click **Configure Items**.

Result

The ServiceNow AI Platform creates order line items for each location as per the quantity and defined specifications of product offerings, and associates them to the product order.

If a user in Santa Clara selects two Premium SD-WAN Offerings, the ServiceNow AI Platform creates six order line items. You can then modify the characteristic values differently for each line item. For example, one order line item might have a Basic Router, while another might have an Advanced Router.

What to do next

You can configure the order line item details, modify the order characteristic values for the product offering, and add or remove optional product specifications. An optional configuration copy function enables you to copy the characteristic values for a product offering to different locations or within the same location for different top order line items.

[End]

[store-future: BEGIN review]

Configure the order line item details for the product order

Make sure that all the order line item details are correct and complete, as part of the next step in the process to create a product order.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

You can configure the order line item details, modify the order characteristic values for the product offering, and add or remove related items and optional product specifications. An optional configuration copy function enables you to copy the characteristic values for a product offering to different locations or within the same location for different top order line items.

Every product offering has a set of characteristics and characteristic options:

- Each characteristic is generic, which means that they are associated to one or more product, service, or resource specifications. Use a characteristic or characteristic option to describe the product, service, or resource attributes.
- For each ordered product, you can configure and update the characteristic option selections that are associated with it.
- As you add characteristic options, it incrementally updates the pricing for the order line item.

For example, your customer orders an All-in-One Mobile Plan and you want to update the order characteristics for it when you configure the order line. To do so, use the Characteristics section to select the ordered options for the plan, including the following options:

- SMS Pack
- Voice Pack
- Data Pack

To learn more, see the following:

- [Product catalog data model and catalog versioning](#)
- [Create the characteristics and characteristic options for your product offerings.](#)

Procedure

1. In the Order Line Items (n) section, select the product offering to configure.

A  **Missing Info** message appears if an order line item is incomplete and requires you to enter more details.

Click the message to find out what information is missing. The most common errors that usually appear indicate that you must fill in missing information such as a shipping address or order characteristics for the order line item.

2. To review the general and pricing details for the selected order line item, click **Details**.

New Product Order - Details - Order Line Item

Field	Description
Number	Unique system-assigned number of the order line item.
Product Offering	Product offering that the customer is ordering for fulfillment.
Location	Delivery location for the product offering that the customer is ordering.
Product Specification	Product specification that is associated with the order line item. To learn more, see Create and publish product specifications .
Ordered quantity	Ordered quantity for this order line item. You can change this quantity as needed.

3. Review the pricing details for the order line item.

Note:

The default currency for the order characteristics in your product offerings is based on the system locale [glide.system.locale]. The currency for pricing of the order line items is displayed as per the country that you set while configuring your customer account. If your set currency is other than the system locale currency, the ServiceNow AI Platform converts it to the currency that's specific to your customer and displays the pricing details.

You can't manually adjust the amounts that appear in the Pricing fields. They only increase or decrease if you add or remove non-mandatory product offerings, change the characteristic values, or the order quantities for a line item.

New Product Order - Details - Pricing

Field	Description
Monthly Recurring Charges Per Unit	Total monthly recurring charges per unit for this order line item. An example is a monthly line charge. This fee is based on the monthly recurring charges per unit prices that are defined in the product catalog for each characteristic option in the selected product offering.
Non Recurring Charges Per Unit	Total non-recurring charges per unit for this order line item. An example is a one-time installation fee. This fee is based on the non-recurring charges per unit prices that are defined in the product catalog for each characteristic option in the selected product offering.
Total Price	Total price for the order line item, which is calculated by adding all the characteristic option prices and then multiplying them by the line item order quantity. The price of the top-level order line item includes the following information: - Monthly recurring and non-recurring charges per unit for the product offering. - Prices defined in the product catalog for the characteristic options values that you designated for the top-level order line item.

4. To review the characteristic options and values for the order line item, click **Characteristics**.

New Product Order - Characteristics

Field	Description
Characteristic	Characteristic that is assigned to the product offering. Characteristics include the speed, capacity, size, configured settings, hardware, and software.
Characteristic Value	Options that you can select for the mandatory characteristics that are associated with the product offering. For each field, select the option that your customer selected.

5. To update or enter values for characteristic options selections with **(empty)** indicators, do the following actions:

- a. In the Characteristics pane, click the open preview icon () that appears in the Details columns to the left of the one you want to update.
- b. An Order Characteristics window appears with the following information.

Field	Description
Characteristic *	Characteristic that is assigned to the product offering. Characteristics include the speed, capacity, size, configured settings, hardware, and software.
Characteristic Value	Value text field that you can enter the value information for the selected characteristic that you are updating.

- c. After reviewing and updating characteristic options and values, click **Update**.
6. To copy the characteristic values for an entire product from a destination location to another location or from one product offering to another product offering, do the following actions.
- For example, let's say that you sold a Premium SD-WAN Offering for the customer's Santa Clara location, and also want to sell it for the customer's San Francisco location.
- a. In the Order Line Items (n) section, select the product offering that you want to clone. In this example, it would be the product offering for the Santa Clara location that you are copying from.
 - b. Click **Details** to return to the Details - Order Line Item pane.
 - c. In the **Product Offering** field, click the copy order line item configuration icon ()
 - d. A Select locations to copy this configuration window appears with the following information:

Select locations to copy this configuration

Field	Description
Location *	Name of the location that you selected to copy a product configuration from.
Product Offering *	Name of the product offering that you selected to copy a product configuration from.
Copy To Locations *	Names of the locations that you want to copy the product configuration to. i. Click the Locations field and then select a location. ii. To select another location, place your cursor to the right of the previous selection and then select a location.

- e. After selecting the copy to locations, click **Copy**. The following message appears if the copy process is successful:

✓ You have successfully copied configurations



This process copies the product hierarchy for the selected product offering from its selected location to the specified copy to location. For example, it copies the product hierarchy for the Premium SD-WAN Service offering in Santa Clara to the selected San Francisco location. If the same offering line items exists in the destination location, it copies the characteristic options and values.

- To add related items for your customer orders with horizontal relationships, do the following actions.
- When you finish reviewing and updating the order line item, perform one of the following actions.
- Upon clicking the **Review** button, validation of the related items of the customer order occurs and it navigates you to the order submission page.

Option	Description
If the validation is successful	The ServiceNow AI Platform displays the following message: Provided related inventory/order line items are compatible. This message confirms that the order information doesn't require any additional input and you can proceed to the next steps of the order fulfillment.

Option	Description
If the validation is unsuccessful	The ServiceNow AI Platform displays one of the following messages: - For Order line item (ORDLn): One or more related inventory/order line items are not compatible. Provide the correct dependent inventory details prior to closure of the related domain orders. - For Order line item (ORDLn): One or more related items are required. Provide the related inventory details prior to closure of the related domain orders. This message confirms that the order information requires additional details for its decomposition. You can provide the required information to proceed for the next process of the order fulfillment.
[End]	
[store-future: BEGIN review]	
Review and submit the product order	
Review all the order line items as the next step in the process to create a product order. Edit the order details as needed before submitting it for fulfillment approval.	
Before you begin	
Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager	
About this task	
To learn more about the order review and fulfillment approvals, see Reviewing customer (product) orders .	
Procedure	
1. On the New Product Order form, review the general and pricing details for the order line items.	
New Product Order form	
Field	Description
Order Line	Unique system-assigned number of the order line item.
Product Offering	Product offering that the customer is ordering for fulfillment.
Product Specification	Product specification that is associated with the order line item. To learn more, see Create and publish product specifications .

Field	Description
Monthly Recurring Charges	Total monthly recurring charges for this order line item. An example is a monthly line charge.
Non Recurring Charges	Total non-recurring charges for this order line item. An example is a one-time installation fee.
Total Price	Total price for this order line item.

Note:

You can't manually adjust the amounts that appear in the pricing fields. They only change if you change the characteristic values for the order line items. To learn more, see [Configure the order line item details for the product order](#).

2. To update the details for an order line item, do the following actions:

- a. Click the open preview icon (🔍) to the left of the order line item that you want to update. A pane opens to the right with the **Detail** and **Activity** panes.

Note:

To learn about these fields, see [Order Line Items form \(customer orders\)](#).

- b. In the **Details** pane, fill in the order line item information as needed. When finished, click **Update** to update the order line item details.
- c. In the **Activity** pane, enter a free-form comment or internal work order text for the order line item:
 - Text that you enter into the **Comments** block can be viewed by anyone, including your customer.
 - Text that you enter into the **Work notes (Private)** block can only be viewed by your internal personnel.
- d. When you are finished entering comments or private work notes, click **Post Comments**.

3. To submit it for fulfillment approval, click **Submit Order**.

4. When the Submission successful confirmation message appears, click **OK**.

Result

When you formally submit the product order, its state changes from Draft to New. An order fulfillment manager can now review and approve it for fulfillment. To learn more, see [Approving and fulfilling customer \(product\) orders](#).

[End]

[store-future: BEGIN review]

Change a product order inventory record

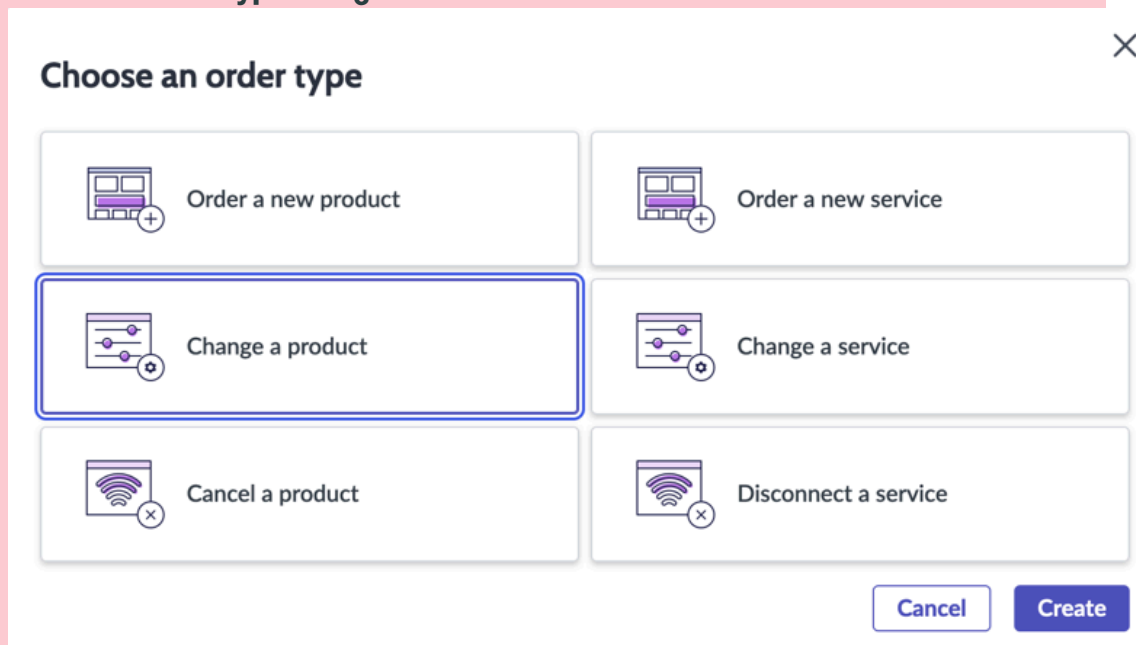
As a provider, learn how to change a product order inventory record, also known as a customer order, in the ServiceNow AI Platform for your customers.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. To change a product order inventory record for an existing customer account, do the following actions:
 - a. From the **Configurable Workspace Lists** tab () , click **Customer Orders**.
 - b. To select all orders, click **All** or to select one order, click **Open**.
 - c. Click **New**.
3. When the Choose an order type dialog appears, select **Change a product** and click **Create**.

Choose an order type dialog


The dialog box titled "Choose an order type" contains six options arranged in a 3x2 grid. Each option has an icon and a text label. The "Change a product" option is highlighted with a blue border. At the bottom right are "Cancel" and "Create" buttons.

 Order a new product	 Order a new service
 Change a product	 Change a service
 Cancel a product	 Disconnect a service

Cancel Create

[End]

[store-future: BEGIN review]

Select a customer's account and contact information

Select a customer's account and contact information as the first step in the process to change a product order inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. On the form, fill in the fields.

Change a product - Create Order form

Field	Description
Account	Name of the customer account. To filter the customer list and find an account, enter the first few letters of the customer's name.
Contact	Name of the contact for the order. To filter the customer contact list and find a contact, enter the first few letters of the contact name.

2. Click **Continue**.

[End]

[store-future: BEGIN review]

Select the product inventories from the available inventory

Select the product inventories from the available inventory as the next step in the process to change a product order inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you go to the Select Products form, the ServiceNow AI Platform displays a list of active product inventories in the content tree. This list is based on the location for your customer account. You can select the product inventories by clicking the expand icon () or the collapse icon () in the content tree. If the product inventories list is long, you can browse the list by clicking through the pages.

You can use a filter to find the product inventories that you're going to change. For more information, see [Search and view an inventory by using a filter](#).

Note:

Your available inventory includes all the product or services that are ordered by your customer and successfully fulfilled by you.

Procedure

1. To select a product inventory directly from the list of inventories, choose a product inventory and then click **Select**.
To choose all the product inventories that are available on each page, click **Select all** and then click **Select**.

To choose the entire list of product inventories, click **Select all** on all the pages in the content tree.

Note:

To select product inventories by using a filter, see [Search and view an inventory by using a filter](#).

2. In the Select all pane, click the product inventories that you want to change and click **Select**. If you want to remove the selection from any product inventories, place your cursor anywhere in the change order and click **Unselect**.

If you want to remove the selections from all the product inventories, select **Reset** and click **Yes**.

3. In the product inventory information pane, review the order details and characteristic information, and click **Configure**.

What to do next

Configure the order line item details, modify the order characteristic values for the product specifications, and add or remove the optional product specifications. You can use an optional configuration copy function to copy the characteristic values for a product offering to different locations or within the same location for the different top order line items.

[End]

[store-future: BEGIN review]

Search and view an inventory by using a filter

[store-future: BEGIN review]Search and view your customer's product inventory records faster by using a filter as the next step in the process to change a product order inventory record.[End]

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Click the **Locations** field and then select a location.
The available addresses are the customer locations that have the existing, active product inventories of the customer account that you selected in the Create Order form. To enter a customer's address and find a location, enter the first few letters of the location name.
2. To select another location, place your cursor to the right of the previous selection and then select another location.
3. To remove a location, click **X**.
4. Click the **Product Offering** field and then select a product offering.
The product offerings and the related information are displayed from the customer's active inventory records.
5. Click the **Product Specification** field and then select a product specification.
The product specifications are displayed when you select the product offering. After you select the product specification, you can use the filter that is based on the product characteristics. To add the characteristics and values to the filter, click the **Add characteristics** button and do the following actions:
 - a. Click the **Characteristic** field and then select a characteristic. The available characteristics are from the product specifications that you selected.
 - b. Click the **Values** field and then select a value. The available values come from the selected product specifications.
 - To select another value, place your cursor to the right of the previous selection and then select a value.
 - To remove a value, click **X**.

To add another characteristic, or delete a previously selected characteristic, do the following actions:

6. Click **Apply.**

Result

The filtered products inventory appears in the Select all pane.

[End]

[store-future: BEGIN review]

Verify the details of the order line item

Verify that all the details of the order line item are correct and complete as the next step in the process to change a product order inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you are changing a product order inventory record, the ServiceNow AI Platform creates the order line items as per the specifications that you've defined. If your selected product inventory has parent or grandparent product inventories, the order line items are also created for the parent or the grandparent product inventories. If the selected inventories are top-order parent items, the order line items are only created for the parent items, not for the child order items.

For example, let's say that your customer wants to change the order for the SD-WAN Edge Device. After you select the product inventory for this item, the ServiceNow AI Platform creates two order line items for this change order, one for the SD-WAN Edge Device and another for its parent, the SD-WAN Service Package. If you select the SD-WAN Service Package inventory, which is the parent order item, only one order line item is created.

You can configure the details for the order line item, modify the order characteristic values for the product offering, and add or remove optional product specifications. An optional configuration copy function enables you to copy the characteristic values for a product offering to different locations or within the same location for the different top-order line items.

Every product offering has a set of characteristics and characteristic options:

- Each characteristic is generic, which means that they are associated to one or more product, service, or resource specifications. Use a characteristic or characteristic option to describe the product, service, or resource attributes.
- For each ordered product, you can configure and update the characteristic option selections that are associated with it.
- As you add characteristic options, it incrementally updates the pricing for the order line item.

For example, your customer requests to change the order for the All-in-One Mobile Plan and you want to update the order characteristics for it when you configure the order line item. Use the Characteristics section to select the change order options for the plan, including the following options:

- SMS Pack
- Voice Pack
- Data Pack

To learn more, see the following:

- [Product catalog data model and catalog versioning](#)
- [Create the characteristics and characteristic options for your product offerings.](#)

Procedure

1. In the Order Line Items (n) section, select the product offering that you want to configure.

A  **Missing Info** message appears if an order line item is incomplete and requires that you enter more details.

Click the message to find out what information is missing. A common error is related to filling out some missing information, such as a shipping address or order characteristics, for the order line item.

2. To review the general and pricing details for the selected order line item, click **Details..**
The following table describes the fields in this tab.

Product Change - Details - Order Line Item tab

Field	Description
Number	Unique system-assigned number of the order line item.
Location	Location of the product order inventory that the customer is changing.
Product Offering	Product offering that the customer is changing.
Product Specification	Product specification that is associated with the order line item. To learn more, see Create and publish product specifications.

3. Review the pricing details for the order line item.

Note:

The default currency for the order characteristics in your product offerings is based on the system locale [glide.system.locale]. The currency for the pricing of the order line items is displayed for the country that you set when you configured your customer account. If you set a currency that is other than the system locale currency, the ServiceNow AI Platform converts it to the currency that's specific to your customer and displays the pricing details.

You can't manually adjust the amounts that appear in the Pricing fields. The amounts only increase or decrease when you add or remove non-mandatory product offerings or change the characteristic values or the order quantities for a line item.

Product Change - Details - Pricing tab

Field	Description
Monthly Recurring Charges Per Unit	Total monthly recurring charges per unit for this order line item. An example is a monthly line charge. This fee is based on the monthly recurring charges per unit prices that are defined in the product catalog for each characteristic option in the selected product offering.
Non Recurring Charges Per Unit	Total non-recurring charges per unit for this order line item. An example is a one-time installation fee. This fee is based on the non-recurring charges per unit prices that are defined in the product catalog for each characteristic option in the selected product offering.
Total Price	Total price for the order line item, which is calculated by adding all the characteristic option prices and then multiplying them by the line item order quantity. The price of the top-level order line item includes the following information: - Monthly recurring and non-recurring charges per unit for the product offering. - Prices defined in the product catalog for the characteristic options values that you designated for the top-level order line item.

4. To review the characteristic options and values for the order line item, click the **Characteristics** tab.

Product Change - Characteristics tab

Field	Description
Characteristic	Characteristic that is assigned to the product offering. Characteristics include the speed, capacity, size, configured settings, hardware, and software.
Characteristic Value	Options that you can select for the mandatory characteristics that are associated with the product offering. For each field, select the option that your customer selected.

5. To update or enter the values for the characteristic options selections with (empty) indicators, do the following actions:

- a. In the Characteristics pane, click the open preview icon () that appears in the Details column.
- b. When the Order Characteristics window appears, fill in the fields.

Product Change - Characteristics tab

Field	Description
Characteristic *	Characteristic that is assigned to the product offering. Characteristics include the speed, capacity, size, configured settings, hardware, and software.
Characteristic Value	Value text field that you can enter the value information for the selected characteristic that you are updating.

- c. After you review and update the characteristic options and values, click **Update**.
6. To copy the characteristic values for an entire product from a destination location to another location or from one product offering to another product offering, do the following actions:
- a. In the Order Line Items (n) section, select the product offering that you want to clone.
 - b. To return to the Details-Order Line Item pane, click **Details**.
 - c. In the **Product Offering** field, click the copy order line item configuration icon ()
 - d. When the Select locations to copy this configuration window appears, fill in the fields:

Select locations to copy this configuration window

Field	Description
Location *	Name of the location that you selected to copy a product configuration from.
Product Offering *	Name of the product offering that you selected to copy a product configuration from.
Copy To Locations *	Names of the locations that you want to copy the product configuration to. i. Click the Locations field and then select a location. ii. To select another location, place your cursor to the right of the previous selection and then select a location.

- e. Click **Copy**. The following message appears if the copy process is successful:

✓ You have successfully copied configurations



This process copies the product hierarchy for the product offering from its location to the specified copy to location. If the same offering line items exist in the destination location, it copies the characteristic options and values.

7. To add related items for your customer orders with horizontal relationships, do the following actions.
8. When you finish reviewing and updating the order line items, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review the order line items and submit the change order for the product inventory

Review all the order line items as the last step in the process to change a product order inventory record. Edit the order details, as needed, before submitting it for a change approval.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

To learn more about the order review and fulfillment approvals, see [Reviewing customer \(product\) orders](#).

Procedure

1. On the Product change form, review the general and pricing details for the order line items.
[store-future: BEGIN review]

Product change form

Field	Description
Number	Unique system-assigned number of the order line item.
Product Offering	Product offering that the customer is changing.
Product Specification	Product specification that is associated with the order line item. To learn more, see Create and publish product specifications .
Monthly Recurring Charges	Total monthly recurring charges for this order line item. An example is a monthly line charge.

Field	Description
Non Recurring Charges	Total non-recurring charges for this order line item. An example is a one-time installation fee.
Total Price	Total price for this order line item.

Note:

You can't manually adjust the amounts that appear in the pricing fields. They only change if you change the characteristic values for the order line items. To learn more, see [Configure the order line item details for the product order](#).

[End]

2. To update the details for an order line item, do the following actions:

- a. Click the open preview icon (🔍) next to the order line item that you want to update. The **Detail** and **Activity** tabs open.

Note:

To learn about these tabs, see [Order Line Items form \(customer orders\)](#).

- b. On the **Detail** tab, fill in the information about the order line item and then click **Update**.
- c. On the **Activity** tab, enter a free-form comment or internal work order text for the order line item:
 - Text that you enter into the Comments block can be viewed by anyone, including your customer.
 - Text that you enter into the Work notes (Private) block can be viewed only by your internal personnel.
- d. Click **Post Comments**.

3. Click **Submit Order**.

4. When the Submission successful confirmation message appears, click **OK**.

Result

When you formally submit the product order, its state changes from Draft to New. An order fulfillment manager can review and approve it for change fulfillment.

[End]

[store-future: BEGIN review]

Cancel a product order inventory record

As a provider, you can cancel a product inventory record in the ServiceNow AI Platform for your customers. For example, you might want to cancel your current, legacy router.

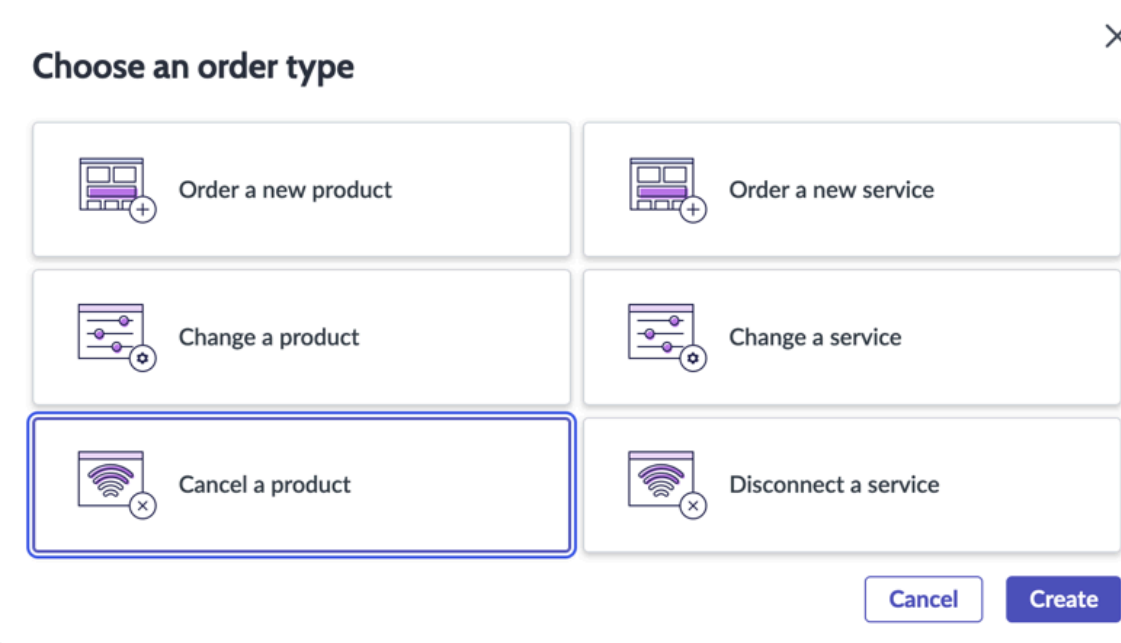
Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

- 1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
- 2. To cancel a product order inventory record for an existing customer account, do the following actions:
 - a. From the **CSM/FSM Configurable Workspace Lists** tab () , click **Customer Orders**.
 - b. To select all orders, click **All** or to select one order, click **Open**.
 - c. Click **New**.
- 3. When the Choose an order type dialog appears, select **Cancel a product** and click **Create**.

Choose an order type dialog



[End]
[store-future: BEGIN review]

Select a customer's account and contact information

Select a customer's account and contact information as the first step in the process to cancel a product inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

- 1. On the form, fill in the fields.

Cancel a product - Create order form

Field	Description
Account	Name of the customer account. To filter the customer list and find an account, enter the first few letters of the customer's name.

Field	Description
Contact	Name of the contact for the order. To filter the customer contact list and find a contact, enter the first few letters of the contact name.

2. Click **Continue**.

[End]

[store-future: BEGIN review]

Select the product inventories from the available inventory

Select the product inventories from the available inventory as the next step in the process to cancel a product inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you go to the Select Products form, the ServiceNow AI Platform displays a list of active product inventories in the content tree. This list is based on the location for your customer account. You can select the product inventories by clicking the expand icon () or the collapse icon () in the content tree. If the product inventories list is long, you can browse the list by clicking through the pages.

You can use a filter to find the product inventories that you're going to cancel. For more information, see [Search and view a product inventory by using a filter](#).

Note:

Your available inventory includes all the product or services that are ordered by your customer and successfully fulfilled by you.

Procedure

1. To select a product inventory directly from the list of inventories, choose an inventory and then click **Select**.

To choose all the product inventories that are available on each page, click **Select all** and then click **Select**.

To choose the entire list of product inventories, click **Select all** on all the pages in the content tree.

Note:

To select the product inventories by using a filter, see [Search and view an inventory by using a filter](#).

2. In the Select all pane, click the product inventories that you want to change and click **Select**. If you want to remove the selection from any product inventories, place your cursor anywhere in the change order and click **Unselect**.

If you want to remove the selections from all the product inventories, select **Reset** and click **Yes**.

3. In the product inventory information pane, review the order details and characteristic information, and click **Configure**.

[End]

[store-future: BEGIN review]

Search and view a product inventory by using a filter

Search and view your customer's product inventory records by using the filter as the next step in the process to cancel a product inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Click the **Locations** field and then select a location.
The available addresses are the customer locations that have the existing, active product inventories of the customer account that you selected in the Create Order form. To enter a customer's address and find a location, enter the first few letters of the location name.
2. To select another location, place your cursor to the right of the previous selection and then select a location.
3. To remove a location, click **X**.
4. Click the **Product Offering** field and then select a product offering.
The product offerings and the related information are displayed from the customer's active inventory records.
5. Click the **Product Specification** field and then select a product specification.
The product specifications are displayed when you select the product offering. After you select the product specification, you can use the filter that is based on the product characteristics. To add the characteristics and values to the filter, click the **Add characteristics** button and do the following actions:
 - a. Click the **Characteristic** field and then select a characteristic. The available characteristics are from the product specifications that you selected.
 - b. Click the **Values** field and then select a value. The available values come from the product specifications that you selected.
 - To select another value, place your cursor to the right of the previous selection and then select a value.
 - To remove a value, click **X**.

To add another characteristic, or delete a previously selected characteristic, do the following actions:

6. Click **Apply**.

Result

The filtered products inventory appears in the Select all pane.

[End]

[store-future: BEGIN review]

Review the order line items and submit the cancel order for product inventory

Review all the order line items as the last step in the process to cancel a product inventory record. Edit the order details as needed before submitting it for fulfillment approval.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you are canceling a product order inventory, the ServiceNow AI Platform creates the order line items as per the specifications that you've defined. To cancel a product order inventory record, if your selected inventories are top-order parent items, the order line items are created for both the parent items and the child order items. If your selected inventories are child-order items, the order line items are created only for the child items.

For example, your customer requests to cancel the order for SD-WAN Service Package. After you selected the product inventory, the ServiceNow AI Platform creates four order line items for this change order, one for the SD-WAN Service Package and one for each of the three child order items, such as SD-WAN Controller, SD-WAN Edge Device, and SD-WAN Security. If you selected any of the three children inventories, only one order line item is created for the selected child inventory.

To learn more about the order review and fulfillment approvals, see [Reviewing customer \(product\) orders](#).

Note:

For change and disconnect type of customer orders, the below message is displayed.

This validation is not applicable for order line items with change or disconnect action.

Procedure

1. On the Product cancellation form, review the general and pricing details for the order line items.

Product cancellation form

Field	Description
Number	Unique system-assigned number of the order line item.
Product Offering	Product offering that the customer is requesting for cancellation.
Product Specification	Product specification that is associated with the order line item. To learn more, see Create and publish product specifications .
Monthly Recurring Charges	Total monthly recurring charges for this order line item. An example is a monthly line charge.

Field	Description
Non Recurring Charges	Total non-recurring charges for this order line item. An example is a one-time installation fee.
Total Price	Total price for this order line item.

Note:

You can't manually adjust the amounts that appear in the pricing fields. They only change if you change the characteristic values for the order line items. To learn more, see [Configure the order line item details for the product order](#).

2. To update the details for an order line item, do the following actions:

- a. Click the open preview icon (🔍) to the left of the order line item that you want to update. The **Detail** and **Activity** tabs open.

Note:

To learn about these tabs, see [Order Line Items form \(customer orders\)](#).

- b. On the **Detail** tab, fill in the order line item information as needed. When finished, click **Update** to update the order line item details.
- c. On the **Activity** tab, enter a free-form comment or internal work order text for the order line item:
 - Text that you enter into the Comments block can be viewed by anyone, including your customer.
 - Text that you enter into the Work notes (Private) block can only be viewed by your internal personnel.
- d. Click **Post Comments**.

3. Click **Submit Order**.

4. When the Submission successful confirmation message appears, click **OK**.

Result

When you formally submit the product order, its state changes from Draft to New. An order fulfillment manager can now review and approve it for cancellation.

[End]

[store-future: BEGIN review]

Reviewing customer (product) orders

Learn how your order fulfillment manager can review customer orders for fulfillment to verify that your customer orders are fulfilled correctly.

Customer order review and approval tasks

After you capture a customer order, the order fulfillment manager selects and verifies the order, line item, product specification, and characteristics data, and then decides whether to approve or reject the order. If it's approved, the order decomposition process initiates and triggers the order fulfillment flow to fulfill the customer order. See the following table for a list of the customer order review and approval tasks that you can do. After the ServiceNow AI Platform

captures a service order, the service order manager selects and verifies the order, line items, and characteristics data, and then approves or rejects it. Learn how this process triggers the order fulfillment flow and creates the required tasks to fulfill the service order.

Customer order review and approval tasks

Task	Description
1. Select a customer order.	Navigate to your workspace and select the order.
2. Review the customer order line items.	Validate that the assigned locations for each ordered line item are correct for each ordered product.
3. Review and update the contact information for the customer order line item.	Ensure that the customer contact information is correct for the customer order line item.
4. Review the product specifications that are associated with the customer order line item.	Update the customer line item as needed.
5. Review the order characteristics selections for the customer order line item.	Ensure that the customer's characteristics selections are correct.
6. After you are satisfied that all order details are correct, approve the customer order for fulfillment processing.	Approve the customer order.
7. Perform the tasks for post-approval customer order fulfillment.	Ensure that the customer order is properly fulfilled.

[End]

[store-future: BEGIN review]

Select, review, revise, or request cancellation of a customer order

Select a customer order, and review the account, contact, pricing, and date details to make sure that the order is correct and complete. If you need to, you can revise or request the cancellation of a customer order.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.



Note:

If you aren't currently using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#).

If you have an assigned order fulfillment manager or order fulfillment agent role, the Customer Order Management workspace appears. If the Customer Order Management workspace doesn't appear, do the following actions:

- a. From the Configurable Workspace Lists icon (, click **Customer Orders**.
- b. Do one of the following actions:
 - To view all customer orders, click **All**.
 - To view only open, unfulfilled customer orders, click **Open**.
- c. Select the customer order that you want to review, verify, approve, or fulfill:
 - To refresh the form, click the refresh icon (.
 - To filter existing customer orders, click the filter icon (.
2. To select the customer order that you want to review, click the appropriate tile in the Customer Order Management workspace.
3. On the Customer Order form, review the order number, account, and contact information for the selected customer order.
4. To revise or request cancellation of a customer order in an In Progress state, perform one of the following actions.

Note:

To learn more about inflight order changes, see [Managing inflight order changes and cancellation requests](#).

5. In the customer order, make the required changes, and then click **Save**.

[End]

[store-future: BEGIN review]

Validate the related items of a customer order for its compatibility

Validate the related order line items of your customer order, which includes the horizontal specification relationships, to make sure that the order-related information is correctly generated to fulfill your customer order.

Before you begin

A horizontal specification relationship is defined by defining a compatibility rule between the product, service, or resource specifications in a product catalog.

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

After you define a compatibility rule, when you capture a customer order, you can validate the order related items before you approve the order. For this validation, you review the specification relationships of the order line items and the order input data of your customer when you created the order.

Validations occur at two levels:

1. Validations before the order approval. If these validations fail, the order decomposition process doesn't stop. The following validations take place:
 - Source specification and source specification configuration
 - Compatibles validation
 - Compatibles quantity validation
2. Validation at the time that a domain order is closed. If this validation fails, the order fulfillment process stops. The following validations take place:
 - Source specification and source specification configuration
 - Compatibles validation
 - Compatibles quantity validation
 - Compatibles configuration

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned order fulfillment manager or order fulfillment agent role, the Customer Order Management workspace appears. If the Customer Order Management workspace doesn't appear, do the following actions:

- a. From the Configurable Workspace Lists icon () click **Customer Orders**.
 - b. Do one of the following actions:
 - To view all customer orders, click **All**.
 - To view only open, unfulfilled customer orders, click **Open**.
 - c. Select the customer order that you want to validate:
 - To refresh the form, click the refresh icon (.
 - To filter the existing customer orders, click the filter icon (.
2. To validate the related items of the customer order, click **Validate Related Items** on the Customer Order form.

Option	Description
If the validation is successful	The ServiceNow AI Platform displays the following message: Provided related inventory/order line items are compatible. This message confirms that the order information doesn't require any additional input and

Option	Description
	you can proceed to the next steps of the order fulfillment.
If the validation is unsuccessful	The ServiceNow AI Platform displays a message that confirms whether the order information requires additional details for its decomposition. You can provide the required information to proceed for the next process of the order fulfillment.

Note:

For change and disconnect type of customer orders, the below message is displayed for the validation of the related items of the customer order.

This validation is not applicable for order line items with change or disconnect action.

3. Click Approve.

Note:

Upon approving for the change and disconnect type of order requests with horizontal relationships, the ServiceNow® system analyses its impact on the product inventory relationships and displays a message if it invalidates the existing relationships due to the impact of the requested change by the customer.

What to do next

Review and update the order line related items. For more information, see [Review and update the order line related items for a customer order line item](#).

[End]

[store-future: BEGIN review]

Reviewing the line items and related details for a customer order

Review the line items and the related details of a customer order to make sure that all line items and details are correct and complete. The related details include the service order line item characteristics and contacts.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

About this task

By using the Customer Order Line Items and Customer Order Characteristic forms together, you can do the following actions:

- View an existing customer order line item.
- View, add, change, or delete a new characteristic of an order line item. To learn more, see [Review and update the characteristic values on a customer order](#).

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't currently using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned order fulfillment manager or order fulfillment agent role, the Customer Order Management workspace appears. If the Customer Order Management workspace doesn't appear, do the following actions:

- a. From the Configurable Workspace Lists icon (, click **Customer Orders**.
 - b. Do one of the following actions:
 - To view all customer orders, click **All**.
 - To view only open, unfulfilled customer orders, click **Open**.
 - c. Select the customer order that you want to review, verify, approve, or fulfill:
 - To refresh the form, click the refresh icon (.
 - To filter existing customer orders, click the filter icon (.
2. In the Customer Order Management workspace, select the customer order, and then click the appropriate tile.

For information about the field descriptions, see the Customer Order Management workspace fields section in [Customer Order Management workspace and Customer Order forms in Order Management for Telecommunications and Media](#).
 3. After selecting and opening the customer order in the Customer Order form, click **Order Line Items (n)** to view the customer line item details.

(n) represents the number of the total number of line items for the customer order. The Order Line Items form appears.
 4. Select an existing customer order line item to review, add a new one, or select the associated product specification for review.
 5. On the form, review the general details for the selected customer order line item.

For information about the field descriptions, see the Order Line Items form - line item details fields section in [Order Line Item form \(customer orders\) in Order Management for Telecommunications and Media](#).
 6. Review the pricing details for the selected customer order line item.

For information about the field descriptions, see the Order line items form - pricing detail fields section in [Order Line Item form \(customer orders\) in Order Management for Telecommunications and Media](#).
 7. Review the remaining details for the selected customer order line item.

For information about the field descriptions, see the Order line items form - other detail fields section in [Order Line Item form \(customer orders\) in Order Management for Telecommunications and Media](#).

8. To review the details of order line related items, see [Reviewing the line items and related details for a customer order](#).
9. To review the details of external product inventory ID, see [Review the external product inventory details for a customer order](#).
10. To save any updates that you made to the customer order line item, click **Save**.

What to do next

As needed, review and update the related contact, order characteristic values, and order tasks.

Note:

If you create a manual fallout record or an automated one is generated for the order tasks, you can easily review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see [Managing order fallout](#).

[End]

[store-future: BEGIN review]

Review and update the contacts for a customer order line item

Review and update your customer's current contact information that is associated with a customer order line item so that you can make sure that your customer's information is always correct. You can also add, change, or delete customer contacts as needed.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. To view the customer contacts that are currently associated with an order line item, select the customer order line item.
To learn more, see [Reviewing the line items and related details for a customer order](#).
2. Click **Order Line Item Contacts**.
3. On the form, fill in the fields.

Order Line Item Contacts form

Field	Description
First Name	First name of the customer contact.
Last Name	Last name of the customer contact.
Business Phone	Business phone number for the customer contact.

Field	Description
Email	Email address for the customer contact.

4. To add or delete a customer order contact, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review and update the product specifications for a customer order line item

Review and update the product specification that is associated with a selected customer order line item. A product specification is a template that you can use to define, at a functional level, a product that a provider sells to the customer.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager

About this task

To learn more about product specifications, see [Create and publish product specifications](#).

Procedure

1. To view the associated product specifications, select the customer order line item.
To learn more, see [Reviewing the line items and related details for a customer order](#).
2. In the **Product Specification** field, select the product specification that you want to review.
3. On the form, review the product specification, and update as needed.

For information about the field descriptions, see the Product Specification form fields section in [Order Line Item form \(customer orders\) in Order Management for Telecommunications and Media](#).

4. When you finish reviewing and updating the customer order line item product specification, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review and update the characteristic values on a customer order

Review and update the characteristic option values that are associated with a customer order so that you can make sure the customer's selections are correct.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

About this task

Every product offering has a set of characteristics and characteristic options. The characteristics are generic and can be associated to one or more product, service, or resource specifications. Each characteristic has a certain input type (check box, list, attachment) and can have one or more characteristic options. To learn more, see [Product catalog data model and catalog versioning](#).

Procedure

1. To view the associated order characteristic values, select the customer order line item.
To learn more, see [Reviewing the line items and related details for a customer order](#).
2. Click **Order Characteristics (n)**, where (n) is the number of product characteristics that are associated with the selected customer order line item.
3. On the form, review the customer order characteristics values, and update as needed.

Order Characteristics Values form

Field	Description
Specification	Product specification that is associated with the customer order characteristic. To view specification details, click the product specification. To learn more, see Review and update the product specifications for a customer order line item .
Characteristic	Selected characteristic, for example, Data Pack, for the order line item. To view and update the characteristic details, click the characteristic. These details include the characteristic name, description, and input type.
Characteristic Value	Value that you selected for the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. To view and update the characteristic value details, click the characteristic value. These values include the following: ○ Name of the associated specification ○ Characteristic name ○ Selected characteristic value ○ Associated characteristic option ○ Associated order line item
Characteristic Option	Name of the characteristic option. For example, Unlimited for the Data Pack Unlimited option. To view and update the characteristic option details, click the characteristic option. These values include the name of the characteristic option and the associated characteristics.

4. When you finish reviewing and updating the customer order characteristics, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review and update the order line related items for a customer order line item

Review and update the order line related items information that is associated with a customer order line item so that you can make sure that your customer's information is always correct.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't currently using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned order fulfillment manager or order fulfillment agent role, the Customer Order Management workspace appears. If the Customer Order Management workspace does not appear, do the following actions:

- a. From the Configurable Workspace Lists icon (, click **Customer Orders**.
 - b. Do one of the following actions:
 - To view all customer orders, click **All**.
 - To view only open, unfulfilled customer orders, click **Open**.
 - c. Select the customer order that you want to review, verify, approve, or fulfill:
 - To refresh the form, click the refresh icon (.
 - To filter your existing customer orders, click the filter icon (.
2. In the Customer Order Management workspace, select the customer order and then click a tile.
 3. To view the customer line item details, click **Order Line Items (n)**.
(n) represents the number of the total number of line items for the customer order. The Order Line Items form appears.
 4. To view the associated order line related items, select a customer order line item.
 5. Click **Order Line Related Items (n)**, where (n) is the number of order line related items that are associated with the selected customer order line item.
 6. On the form, review the customer order line related items and update as needed.

Order Line Related Items form

Field	Description
Number	Order line related item number.

Field	Description
Order Line Item	Order line item number.
Related Order Line Item	Target order line item that the selected order line item is associated with.
Specification	Specification name of the related product inventory.
Related Product Inventory	Active product inventory that the selected order line related item is associated with and has a 'Requires' relationship.

Note:

To revise an order or for the inflight change order requests, you update the order details related to order line items before approval. To learn more, see [Review the domain order related items associated with a product order](#).

- When you finish reviewing and updating the customer order line related items, do one of the following actions.

[End]

[store-future: BEGIN review]

Review the external product inventory details for a customer order

Review the external inventory details of the customer orders that you've received from the external Configure, Price, and Quote (CPQ) system during the order capture process.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

Procedure

- View the external product inventories that are currently associated with an order line item by selecting the customer order line item.
To learn more, see [Reviewing the line items and related details for a customer order](#).
- Select **External product inventories**.
- On the form, review the fields values.

Note:

To create a new external product inventory table, select **New** and fill in the form.

External product inventory form

Field	Description
Number	Unique system-assigned number of the external inventory ID.
External product inventory ID	External product inventory ID from the CPQ system.
Order line item	Order line item number against which the external inventory ID is captured.
State	State of the external product inventory ID:

Field	Description
	Valid When the order was closed, the state of the external product inventory ID was updated to Valid. Invalid During the inflight order changes, the state of the external product inventory ID was updated to Invalid. Note: The state of the external inventory ID is updated after the order fulfillment is complete (the order state is Closed Complete).

4. Save or delete the product inventory details.

What to do next

Review and update the related contact, order characteristic values, and order tasks. See [Reviewing the line items and related details for a customer order](#) and [Reviewing customer \(product\) orders](#).

[End]

[store-future: BEGIN review]

Approving and fulfilling customer (product) orders

Learn how your organization can use the Order Management application to fulfill customer orders.

Your order fulfillment manager and order fulfillment agent must do the approval and fulfillment tasks that are described in the following table.

Customer order processing tasks

Task	Description
Review a customer order and approve or reject it for fulfillment.	An order fulfillment manager approves or rejects a customer order for fulfillment. If it's approved, the sold product and order decomposition processing can take place. If it's rejected, more investigation is needed. To learn more, see:

Customer order processing tasks (continued)

Task	Description
	• Approve or reject a customer order for fulfillment • Sold product creation for incoming customer orders • Customer order decomposition after fulfillment approval
Review the product orders that are associated with the approved customer order.	An order fulfillment manager reviews the product orders that were generated for the customer order line item. To learn more, see Reviewing the product orders that are associated with a customer order line item.
Use the Orchestration Plan UI to review the domain orders and order tasks that are associated with the approved customer order.	An order fulfillment manager reviews the orchestration state and hierarchical structure for a selected customer or service order, its associated order line items, domain orders, and order tasks. It indicates how much progress has occurred in the fulfillment process. To learn more, see Reviewing orchestration plans and fulfilling orders.
Review and update the fulfillment tasks that are associated with a customer order.	An order fulfillment agent performs the tasks that are required for post-approval customer order fulfillment, including marking the order tasks as complete. The order fulfillment manager creates the order fallout records for the order tasks that can't be completed. To learn more, see: • Review and update the customer order fulfillment tasks • Managing order fallout
Follow up on the tasks that couldn't be completed by examining the order fallout records and reassign them for more investigation.	An order fulfillment manager reviews the tasks that couldn't be completed in the order fallout records and reassigns the order tasks to fulfillment agents for investigation and resolution. To learn more, see, Review a fallout record

[End]

[store-future: BEGIN review]

Approve or reject a customer order for fulfillment

Select a customer order, and review the account, contact, pricing, and date details to make sure that the order is correct and complete. If you are an order fulfillment manager, can approve or reject a customer order with a New state for fulfillment.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager

About this task

Note:

If the following error message appears in the San Diego release or above after approving an order, it indicates that a required upgrade script was not run.

Some of the OMT tables need reparenting. Please contact administrator to execute the reparenting script.

The Post Upgrade Script performs required order management table reparenting and column promotion. If the script hasn't been run, the order decomposition and order fulfillment functions won't function as designed until your system administrator runs it. To learn more, see [Restructured Order Management tables \(San Diego release and above\)](#).

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't currently using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned order fulfillment manager or order fulfillment agent role, the Customer Order Management workspace appears. If the Customer Order Management workspace doesn't appear, do the following actions:

- a. From the Configurable Workspace Lists icon (, click **Customer Orders**.
 - b. Do one of the following actions:
 - To view all customer orders, click **All**.
 - To view only open, unfulfilled customer orders, click **Open**.
 - c. Select the customer order that you want to review, verify, approve, or fulfill:
 - To refresh the form, click the refresh icon (.
 - To filter existing customer orders, click the filter icon (.
2. To select the customer order that you want to review, click the appropriate tile in the Customer Order Management workspace.

For information about the field descriptions, see the Customer Order Management workspace fields section in [Customer Order Management workspace and Customer Order forms in Order Management for Telecommunications and Media](#).

3. On the Customer Order form, review the order number, account, and contact information for the selected customer order.

For information about the field descriptions, see the Customer Orders form fields section in [Customer Order Management Workspace and Customer Order forms](#).

4. To approve or reject fulfillment of a customer order in a New state, perform one of the following actions.

[End]

[store-future: BEGIN review]

Sold product creation for incoming customer orders

Learn how the application creates and maintains Order Management the customer product and service inventory. By using this application, you can maintain an accurate inventory of your customer products and services.

Overview

The sold product configuration stores the product specifications and services (both customer-facing and resource-facing) that are associated with a sold product on a customer order. The Sold Product [sn_prd_pm_characteristics] record contains information about the new and change order workflows.

New order workflow

The new order workflow is as follows:

1. After the fulfillment manager approves the customer order, the Sold Product characteristics [sn_prd_pm_characteristics] record is created. This record has placeholders for all the specifications that are generated after decomposition. The associated models have an Installation Pending state.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active in the record.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.

Change order workflow

The change order workflow is as follows:

1. After the fulfillment manager approves the customer order, the state of the changed or removed specifications are updated to Change Pending. The models that are associated with the changed specifications are also updated to reflect the latest model that is generated due to the change.
2. During the fulfillment process, when the product, service, and resource orders are closed, the state of the associated specification updates to Active in the Sold Product characteristics [sn_prd_pm_characteristics] record.
3. When you close the customer order, all the characteristics that are associated with the specifications on the customer order update the record.
4. If the change order included a request to disconnect a product or service, the associated sold product record moves to an Inactive state after the order is complete.

[End]

[store-future: BEGIN review]

Customer order decomposition after fulfillment approval

Learn how you can decompose your customer orders into domain orders for fulfillment. Domain orders are the product, service, and resource orders that are generated during decomposition.

Overview

When a fulfillment manager approves a customer order, processing takes place to decompose the customer order into its domain orders for fulfillment. These orders are based on the specifications and specification relationships that are defined in the product catalog.

Customer order approval

1. A fulfillment manager validates each customer order to ensure that the order line items have the required details for fulfillment processing. A fulfillment manager verifies the information that is listed in the following table:

Order aspect	More information
Product specifications	To learn about product specifications, see Review and update the product specifications for a customer order line item .
Customer order characteristics	To learn about the customer order characteristics, see Review and update the characteristic values on a customer order .

2. During the verification, the fulfillment manager can also make corrections or updates to some characteristics.
3. After the verification is complete, the fulfillment manager can approve the customer order by clicking the **Approve** action on the Customer Order form.

Approving the customer order sets the state of the order to Acknowledged and starts the decomposition process.

Customer order line decomposition

When a customer order is approved, order decomposition occurs. In this process, the ServiceNow AI Platform generates the product orders and associated service and resource orders for each customer order line item. The generation of these orders is based on the following product catalog definitions for the related product, service, and resource specifications:

- Specifications
- Specification relationships
- Decomposition rules

To learn more about this process, see the following:

- [Create specification relationships and decomposition rules](#)
- [Reviewing the product orders that are associated with a customer order line item](#)

Decomposition that is based on specification relationships

Specification relationships define the relationships between a product, service, and resource. When you define specification relationships, you can optionally create decomposition rules to specify how a customer order is decomposed, fulfilled, and delivered to your customer.

The best way to view a decomposition rule is as an exclusion rule. You use decomposition rules to specify to exclude domain orders from being created when you receive a customer order that doesn't contain a characteristic or characteristic option. For example, in the SD-WAN Service Package demo data, the following occurs:

- A specification relationship is defined between the SD-WAN Controller product specification and its service specifications.
- The service specification details the services that are required for the product. When an order is received for the SD-WAN Controller product, a product order and a service order are generated for the SD-WAN Controller Service.

Decomposition runs on the specification that is associated with the customer order line item and its hierarchy of specifications. It works as follows:

- If the relationships between the source and target specifications are Bundles, Realized as, or Requires types, a product, service, or resource order is created for the target specification when the customer order is decomposed.
- Decomposition establishes the hierarchical relationship between the source and targets while generating the product, service, and resource orders.
- If the specification relationship is of a Composed of type, decomposition doesn't happen.

The SD-WAN Service Package demo data is an example of a composite product specification that bundles three other product specifications within it:

- SD-WAN Controller
- SD-WAN Edge Device
- SD-WAN Security

The SD-WAN Service Package defines the following relationships:

- SD-WAN Service Package has a Bundles relationship with an SD-WAN Controller
- SD-WAN Service Package has a Bundles relationship with an SD-WAN Edge Device
- SD-WAN Service Package has a Bundles relationship with SD-WAN Security

When a customer order is received for the SD-WAN Service Package, and that order is approved, decomposition is triggered. The customer order line item for the SD-WAN Service Package has a single product order for the SD-WAN Service Package. That SD-WAN Service Package Product order has three child product orders:

- SD-WAN Controller
- SD-WAN Edge Device
- SD-WAN Security (if the option security product was ordered)

Decomposition that is based on defined decomposition rules

When you define specification relationships, you can optionally create decomposition rules. With a decomposition rule, you can specify to exclude domain orders from being created when you receive a customer order that doesn't contain a specific characteristic or characteristic option.

The following example shows that the SD-WAN Controller Tenancy product characteristic was designated as optional.

SD-WAN Controller Tenancy product characteristic

SD-WAN Controller - Realized as - SD-WAN Controller Service

Display Name: SD-WAN Controller - Realized as - S

Source Specification: SD-WAN Controller

Target Type: Service Specification

Target Specification: SD-WAN Controller Service

Mandatory: ☒

Relationship Type: Realized as

Minimum Quantity: 1

Default Quantity: 1

Maximum Quantity: 1

Update Delete

Decomposition Rules New Search Specification Relationship Source Specification Search

Specification Relationship = SD-WAN Controller - Realized as - SD-WAN Controller Service

Specification Relationship	Source Specification	Characteristic	Characteristic Option	Target Specification
☐	SD-WAN Controller	Tenancy	(empty)	SD-WAN Controller Service

Actions on selected rows...

In the example, you see that a decomposition rule was defined for the SD-WAN Controller product specification relationship to the SD-WAN Controller Service. This rule excludes the specification when a customer does not select the **Tenancy** option.

SD-WAN Controller Service decomposition rule

SD-WAN Controller - Realized as - SD-WAN Controller Service

Characteristic: Tenancy

Source Specification: SD-WAN Controller

Target Specification: SD-WAN Controller Service

Update Delete

When a customer places an order and doesn't select the **Tenancy** option, the related service order doesn't generate for it.

You can define the decomposition rules for a specification relationship and include references to a characteristic and characteristic option. The following elements comprise the specification relationship:

- The source specification is the specification that defines the specification relationship.
- The target specification is the specification that the relationship is being defined to.
- Both values are automatically defined when you create the decomposition rule from the specification relationship.

If the characteristic and value are present on the order line, the ServiceNow AI Platform applies the decomposition rules to Add and Change type orders. They are not applied to customer order line items with a Disconnect (Delete) order action.

In this example, the SD-WAN Edge Device is a product specification and SD-WAN Security is a service specification.

- The SD-WAN Edge Device has a characteristic called WAN Optimization and has a Realized as relationship with SD-WAN Security.
- There is a decomposition rule for this relationship with WAN Optimization as the characteristic.

If you receive an order for the SD-WAN Service Package that doesn't include the WAN Optimization characteristic, the decomposition rule prevents the generation of an SD-WAN Controller Service service order. The rule designates that the decomposition of that service order only happens if that characteristic is ordered.

Note:

To learn more about the specification relationships and decomposition rules, see [Create specification relationships and decomposition rules](#).

Staggered decomposition

Staggered decomposition helps you fulfill your customer orders even when service and resource orders were created from different factors, such as a customer's need, availability of the services at a customer's location, and so on. Staggered decomposition creates the domain orders (product, service, and resource orders) at a later stage during the order fulfillment process. The decomposition process is based on the latest information.

However, the one-time order decomposition process (prior to the staggered decomposition) works well when the products and services have the necessary information and order approval to create the domain orders for the order fulfillment.

The following example describes the staggered decomposition process for a product offering called SD-WAN Bronze Plan.

SD-WAN Bronze Plan product offering

The screenshot displays the 'Product Offering' form for 'SD-WAN Bronze Plan'. The form is titled 'Product Offering SD-WAN Bronze Plan' and includes a toolbar with 'Archive', 'Update', 'Copy', and 'Delete' buttons. The form fields are organized into two main sections: 'Product Offering' and 'Activities'.

Product Offering Section:

- Number:** PRDOF01001
- Name:** SD-WAN Bronze Plan
- State:** Published
- Product Specification:** SD-WAN Service Package
- Contract Term:** 12 months
- Monthly Recurring Charges:** \$ 667.1591
- Non Recurring Charges:** \$ 1,334.3181
- Description:** SD-WAN Bronze Plan
- Offering Catalog:** SD-WAN
- Distribution Channel:** Web
- Start Date:** 2021-10-31
- End Date:** 2026-11-30
- Owner:** (empty field)

Activities Section:

- Activities: 1**
- System Administrator**
- Field changes:** 2021-11-22 15:21:28
- Activity Details:**
 - Contract Term: 12 months
 - Description: SD-WAN Bronze Plan
 - Distribution Channel: Web
 - End Date: 2026-11-30
 - Monthly Recurring Charges: \$667.1591
 - Name: SD-WAN Bronze Plan
 - Non Recurring Charges: \$1,334.3181
 - Number: PRDOF01001
 - Offering Catalog: SD-WAN
 - Product Specification: SD-WAN Service Package
 - Start Date: 2021-10-31
 - State: Published

At the bottom of the form, there are tabs for 'Product Offering Characteristics (11)', 'Product Visuals', and 'Related Contracts'.

The SD-WAN Bronze Plan product offering uses a product specification, called an SD-WAN Service Package (as shown in the following example), that has three target specifications:

- SD-WAN Edge Device
- SD-WAN Security
- SD-WAN Controller

SD-WAN Service Package product specifications

Product Specification

SD-WAN Service Package

Update

Copy

Delete

Number

PRDSP00003

State

Published

* Name

SD-WAN Service Package

Code

* Category

SD-WAN Service Package

Line

Type

Service

Cost to Company

* Start Date

2021-11-25

Composite

☒

End Date

Installation Required

☐

Owner

Location Specific

☐

* Description

SD WAN Service Package

Activities

Update

Copy

Delete

Specification Characteristics

Specification Relationships (3)

Product Offerings (5)

Attribute Mappings

Target Type

Search

Source Specification = SD-WAN Service Package

Target Type	Target Specification	Relationship Type	Mandatory	Minimum Quantity	Default Quantity	Maximum Quantity
Product Specification	SD-WAN Security	Bundles	false		1	1
Product Specification	SD-WAN Edge Device	Bundles	true		1	1
Product Specification	SD-WAN Controller	Bundles	true		1	1

1 to 3 of 3

The SD-WAN Edge Device product specification has specification relationships with SD WAN Optimization Service and SD-WAN Routing, and the underlying decomposition rules don't have any values for WAN Optimization and Routing characteristics.

SD-WAN Bronze Plan specification relationships

Product Specification

SD-WAN Edge Device

Update

Copy

Delete

* Description

SD-WAN Edge Device

Activities

Update

Copy

Delete

Activities: 1

admin

Category

SD-WAN Edge Device

Composite

false

Description

SD-WAN Edge Device

End Date

2027-01-24

Installation Required

false

Location Specific

false

Name

SD-WAN Edge Device

Number

PRDSP00005

Start Date

2021-12-25

State

Published

Type

Service

Field charges

2021-12-25 13:21:46

Specification Characteristics (11)

Specification Relationships (3)

Product Offerings

Attribute Mappings (4)

Target Type

Search

Source Specification = SD-WAN Edge Device

Target Type	Target Specification	Relationship Type	Mandatory	Minimum Quantity	Default Quantity	Maximum Quantity
Service Specification	SD WAN Optimization Service	Realized as	true		1	1
Resource Specification	Customer Premise SD-WAN Router	Requires	true		1	1
Service Specification	SD-WAN Routing	Realized as	true		1	1

1 to 3 of 3

The following example shows the decomposition rules for the product offering for the SD-WAN Bronze Plan.

SD-WAN Bronze Plan decomposition rules

Specification Relationship
SD-WAN Edge Device - Realized as - SD-WAN Optimization Service

Display Name: SD-WAN Edge Device - Realized as - SD-WAN Op
Source Specification: SD-WAN Edge Device
Target Type: Service Specification
Target Specification: SD-WAN Optimization Service
Mandatory: ☒

Relationship Type: Realized as
Minimum Quantity: 1
Default Quantity: 1
Maximum Quantity: 10
Quantity Characteristic: WAN Optimization

Activities

Activities: 1

Field	Value
Default Quantity	1
Display Name	SD-WAN Edge Device - Realized as - SD-WAN Optimization Service
Mandatory	True
Maximum Quantity	10
Minimum Quantity	1
Relationship Type	Realized as
Source Specification	SD-WAN Edge Device
Target Specification	SD-WAN Optimization Service
Target Type	Service Specification

Update Delete

Decomposition Rules (1) Quantity Mappings (3)

Specification Relationship - SD-WAN Edge Device - Realized as - SD-WAN Optimization Service

Source Specification	Characteristic	Characteristic Option	Target Specification
SD-WAN Edge Device	WAN Optimization	(empty)	SD-WAN Optimization Service

Decomposition Rules (1) Quantity Mappings (3)

Specification Relationship - SD-WAN Edge Device - Realized as - SD-WAN Routing

Source Specification	Characteristic	Characteristic Option	Target Specification
SD-WAN Edge Device	Routing	(empty)	SD-WAN Routing

1 to 1 of 1

When your customer places an order for the SD-WAN Bronze Plan product offering and you approve this customer order, decomposition begins with the creation of the domain orders as per the defined specification relationships and decomposition rules. Because this customer order doesn't have the values for these characteristics for Routing and WAN Optimization, the decomposition rule doesn't create the service orders.

However, as a part of the order fulfillment process, the information for Routing and WAN Optimization must be available. When your fulfillment agent provides the values for these characteristics, the decomposition rule creates the necessary service orders and the order decomposition completes.

Quantity-based decomposition

Quantity based decomposition enables you to decompose your order into separate domain orders as per the order quantity to manage the fulfillment process and independently. This method also supports:

- Revision of order line item quantity for in-flight orders to fulfill customer's request to modify (increase or decrease) the quantity of the order.
- Support for change of product order to fulfill a customer's request to update the quantity characteristics. It leads to either the creation of new product inventories or the cancellation of existing product inventories.

Support for order line-item quantity and order quantity characteristics

When order decomposition process uses the order quantity information from the order capture process to create multiple product orders that match the line item quantity for a customer order. An agent then fulfills each instance of the product separately, which create the inventory records for each of the fulfillment instances.

When a customer submits an order for three instances of the SD-WAN Service Package product and you approve the order, the decomposition process creates three product orders for the SD-WAN Service Package including one product order for each order line item. Each product order

in the SD-WAN Service Package creates three child orders for the products and services for the order fulfillment process.

To learn more about defining specification relationships with quantity characteristic and quantity mapping, see the following:

- [Create specification relationships and decomposition rules](#)
- [Defining mappings for attribute value propagation to domain orders](#)

Support for a change order with an update for quantity characteristics

When you receive a customer request to revise an order through changing a product characteristic or characteristic value, you can upgrade or downgrade an existing product inventory. As a part of the fulfillment process, you either create new product inventories or cancel existing product inventories.

- If a change in a quantity characteristic option leads to additional new product inventories, the decomposition process creates the domain orders for the target specification and inventories for the fulfillment process.
- If a change in a quantity characteristic option leads to the cancellation of some existing inventories, the decomposition process creates the domain orders needed to manage both the cancellation and changes to the inventories.
 - The fulfillment process notifies the order fulfillment manager to identify the inventories require cancellation or update.
 - The decomposition process sets the **Needs Attention** field to **True** for the domain orders.
 - The order fulfillment manager then views these orders in the Needs Attention widget. The order fulfillment manager can wait to open the domain orders, select the product inventories for cancellation, or update it to resume the order decomposition and fulfillment process.

Support for quantity revision for in-flight orders

When the order fulfillment process is in progress, and you receive a request to revise to increase or decrease an order line item quantity, it is captured as a quantity change. To incorporate the revision, the decomposition process then either creates additional domain orders (referred to internally as a **+ve change**) or cancels the existing domain orders (referred to internally as a **+ve change**) for the order fulfillment.

- If the order revision request is for an increase to the order line item quantity, the decomposition process creates new domain orders to match the updated order line item quantity.
- If the order revision request is for a reduction in the order line item quantity, the decomposition process initiates the cancellation process for some of the domain orders to match the reduced order line item quantity.
- en

Related topics

[Order quantity support in Order Management](#)

[End]

[store-future: BEGIN review]

Reviewing the product orders that are associated with a customer order line item

Review the product orders that were generated for a selected telecommunications customer order line item so that you can make sure that they are correct and complete.

Before you begin

Role required: order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

About this task

Each product order contains service and resource orders that are created when a customer order is approved and then decomposed. You should review each product order and their associated product, service, and resource specifications to make sure that they are correct and complete. You can update them as needed.

Procedure

1. To view the product order that is associated with a customer order line item, select the customer order line that you want to view.
To learn more, see [Reviewing the line items and related details for a customer order](#).
2. Select an existing product order to review or create a product order.
3. On the form, add a product order or review the selected product order detail and update as needed.
 - To show the Details pane in the full screen, click the show form in full screen icon (.
 - To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon ( (default).
 - To show the Activity pane in the full screen, click the show activity in full screen icon (.
4. To review an associated service order, click the **Service Orders (n)** tab, where n is the number of associated service orders.
5. To review the associated resource orders, click the **Resource Orders (n)** tab.
6. When you finish reviewing and updating the product order, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review the domain service orders that are associated with a product order

Review the domain service orders that were generated for a selected customer order line item so that you can ensure that all the related details are correct and complete.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager

About this task

The domain service orders manage the fulfillment of the services that you are rendering for the product that the customer ordered.

Procedure

1. To view the domain service order that is associated with a customer line item and product order, select the customer order line item and product order.
To learn more, see the following:
 - [Reviewing the line items and related details for a customer order](#)
 - [Reviewing the product orders that are associated with a customer order line item](#)
2. Select an existing service order to review or add a new one.

3. On the form, add a service order or review the selected service order detail and update as needed.
 - To show the Details pane in the full screen, click the show form in full screen icon ().
 - To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon () (default).
 - To show the Activity pane in the full screen, click the show activity in full screen icon ().
4. When you finish reviewing and updating the service order, perform one of the following actions.

[End]

[store-future: BEGIN review]

Create an outbound request for the service order

As a provider, create an outbound request for the service orders. You can interact with the external Service Order Management (SOM) or Technical Order Management (TOM) systems to manage the end-to-end order fulfillment process.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_agent,
sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent,
sn_ind_tmt_orm.service_order_manager

About this task

The outbound requests are enabled through the bi-directional integration over a REST API between Order Management for Telecommunications, Media, and Technology and the external systems. To learn more, see [Integrating Order Management with southbound external systems](#).

Procedure

1. Select a service order and open it.
2. Select the **Create Outbound Fulfillment Request** UI action.
 - A record with a new request ID is created in the Outbound Requests related tab with the state as Not Applicable. The order agent can view the details of this new record in the Work notes.
 - If the request action is successful, the order agent updates the state of this new record to Pending. If the request action is unsuccessful, the order agent deletes this new record. The agent can reselect the UI action to reinitiate the outbound request.
 - If the Service Order Outbound Policy decision table in the decision builder has identified the configuration of the domain service order as hierarchical, records are also created for the hierarchy of the individual service order with the same request ID. If it's non-hierarchical, a record is created only for the individual service order.

Note:

During any inflight order changes or order enrichment changes, the Updates available field on the domain service order form gets a tick mark and the existing UI action label changes to **Revise Outbound Request**. In this revised outbound request, the information that is related to the changes in the domain service order is also sent to the external systems.

3. Select the outbound request record to see the details of the received order response from the external system as shown in the following table.

Outbound Request form

Field name	Description
Request ID	Outbound request ID that is generated by the Order Management for Telecommunications, Media, and Technology application.
State	State of the outbound request: Not applicable Created, but not in use yet. Fulfilled The service order fulfillment is completed. Pending error The service order has encountered an error and is waiting for a resolution. Failed The record is discarded and no more in use.
Request context	Reference field values from different tables.
Table name	Name of the table that is referenced in the request context.

[End]

[store-future: BEGIN review]

Revise an outbound request for the service order

As a provider, revise the outbound request that was previously created for a service order by using the Order Management for Telecommunications, Media, and Technology application. This way, you can share any inflight order changes with the external systems during the order fulfillment process.

Before you begin

Ensure that you've first created an outbound request for a service order.

Role required: sn_ind_tmt_orm.order_fulfilment_agent,
sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent,
sn_ind_tmt_orm.service_order_manager

About this task

If you make any changes in the order properties, such as updating the domain order characteristics through the user updates or inflight changes while the order fulfillment is in progress, you might need to share the updated order details with the external systems. To learn more about managing the inflight order changes, see [Managing inflight order changes and cancellation requests](#) and [Select, review, revise, or request cancellation of a customer order](#).

A new Updates available order attribute tracks for any updates in the service order. If you update an order characteristic or revise the domain order (Updated or Canceled) as a part of the

inflight revision, the value of the Updates available field is set to true. Also, the Revise Outbound Request UI action appears on the domain order form to trigger the revision of the outbound request.

Procedure

1. Select a service order and open it.

2. Select the **Revise Outbound Request** UI action.

A dialog box appears with the following message: Want to revise outbound fulfillment request for the service order?

Do one of the following actions:

- Don't trigger this action by selecting **Cancel**.
- Initiate this template by selecting **OK**.

The revised order details are generated and sent to the external systems through the configured integration. To learn more, see [Integrating Order Management with southbound external systems](#).

[End]

[store-future: BEGIN review]

Review the domain resource orders associated with a customer order line item

Review the domain resource orders that were generated for a selected customer order line item so that you can ensure that all the related details are correct and complete.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager

About this task

The domain resource orders manage the resources that are required to fulfill the services for the customer order.

Procedure

1. To view the domain resource order that is associated with a customer line item and product order, select the customer order line item and product order.

To learn more, see the following:

- [Reviewing the line items and related details for a customer order](#)
- [Reviewing the product orders that are associated with a customer order line item](#)

2. Select an associated resource order to review or add a new resource order.

3. On the form, add a resource order or review the selected resource order details and update as needed.

- To show the Details pane in the full screen, click the show form in full screen icon (.
- To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon ( (default).
- To show the Activity pane in the full screen, click the show activity in full screen icon (.

4. When you finish reviewing and updating the resource order, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review the domain order related items associated with a product order

Review the domain order-related line items that were generated for a customer order line item so that you can ensure all the related details are correct and complete.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager

About this task

Each product order contains the domain order related items that are created when a customer order is approved and then decomposed. You should review each domain order related item to make sure that they are correct and complete. You can update them as needed.

Procedure

1. To view the domain order related items that are associated with a customer line item and product order, select the customer order line item and product order.
To learn more, see the following topics:
 - [Reviewing the line items and related details for a customer order](#)
 - [Reviewing the product orders that are associated with a customer order line item](#)
2. Select an associated domain order related item to review or add a new domain order related item.
For change, the new column **Existing related inventory** displays **True** for the domain order related items which are created using existing valid product inventory relationships and **False** for the domain order related items that are newly created.
3. On the form, add a domain order related item or review the selected domain order related item details and update as needed.

Domain Order Related Items form

Field	Description
Number	Domain order related item number.
Domain Order	Domain order number.
Domain Order Specification	Domain order specification (that has the Composed of relationship) that is associated with the customer order with the selected domain order related item.
Related Domain Order	Domain order number that the selected domain order related item is associated with.
Related Inventory	Product inventory that the selected domain order line item is associated with.
Existing related inventory	Default value is False that indicates the new inventory is going to be added.

4. For inflight change order requests, when you update any order line items and approve the order, the updates to the related order line items are displayed in the **Related Domain Order** column.

5. When you finish reviewing and updating the domain order related items, do one of the following actions.

[End]

[store-future: BEGIN review]

Review the information about the product inventory operations

Review the information about the product inventory operations in the Order Management application that is associated with a customer order line item so that you can capture the details for the suspension and resume operations.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Customer Order Management > Customer Orders > Order Line Items**.
2. On the **Product Inventory Operations** related tab, review the details on the Product Inventory Operations form.

Product Inventory Operations form

Fields	Description
Number	System-generated number for a new record in the Product Inventory Operations table.
Product inventory	Reference to the Product Inventory table record.
State	State of the records in the Product Inventory Operations table. Schedule pending The record in the table was just created and the scheduler is yet to pick up the record. Scheduled The scheduler has picked up the record in the table. Completed The product inventory got updated to Suspended or Active based on the suspend or resume action. Failed The scheduler failed to pick up the record. Canceled The requested suspend or resume action got canceled.

Fields	Description
Action date	Date when the inventory state got updated to Suspended or Active.
Action	Supported actions on the product inventory: ○ Suspend ○ Resume
State reason	Message to indicate the success or failure of the record for the suspend or resume action.
Source record id	Reference to the Order Line Item table record.
Table	Name of the Order Line Item table.

[End]

[store-future: BEGIN review]

Validate the product inventory relationships after the domain order is closed

Validate the related product inventory details after you close a product (domain) order to make sure that the inventory information is correctly generated to fulfill your customer order.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you close a product order to fulfill a customer order that has horizontal relationships, the ServiceNow AI Platform validates the related product inventories of your product order.

- If the validation is successful, the domain order-related inventories are captured in the product inventory relationships table with the Valid state.
- If the validation fails, you must provide the correct related inventory details in the domain order related items table.

Procedure

1. To view the product inventory relationship details that are associated with a product order inventory, select the product order and preview the product inventory record.
To learn more, see [Reviewing the product orders that are associated with a customer order line item](#).
2. Select an associated product inventory relationship record item to review or add a new domain order related item.
3. On the form, add a product inventory relationship or review the details of the product inventory relationship and update as needed.

Product Inventory Relationship form

Field	Description
Number	Product inventory relationship number.

Field	Description
Related Inventory	Target product inventory with which the selected product inventory is associated.
Inventory	Source product inventory of the customer order that the selected product order is associated with.
State	Valid or Invalid states of the product inventory. ○ For a change order request, in the domain order related items, if you remove any existing relationship, then the state of the product inventory relationship changes to Invalid. When you disconnect an inventory, all of its inventory relationship get invalid. ○ For a change order request, in the domain order related items, if you remove the new inventory relationship, the state of the product inventory relationship doesn't change. It still displays Valid.
Status reason	It automatically displays the reason with order id when the state of the product inventory relationship changes to invalid

4. When you finish reviewing and updating the product inventory relationships, do one of the following actions.

[End]

[store-future: BEGIN review]

Reviewing orchestration plans and fulfilling orders

Learn how you can review the Orchestration Plan user interface (UI) for a customer or service order, its associated order line items, and domain orders, and then do the required tasks for fulfillment. With the Orchestration Plan UI, you get an overview of the entire order so that you can track the order's progress in the fulfillment process.

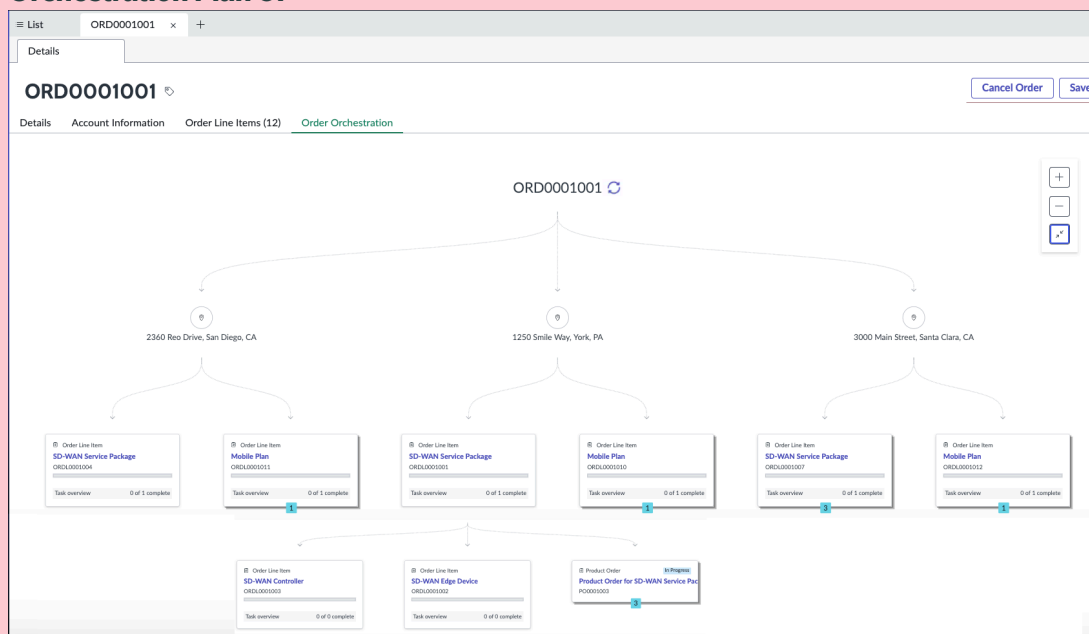
Using the Orchestration Plan UI for fulfillment

As an order fulfillment manager or agent, you can use the Orchestration Plan UI to track and monitor all related domain orders and order tasks for an order, order line item, or domain order. The Orchestration Plan UI shows:

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

The following example shows the Orchestration Plan UI:

Orchestration Plan UI



This pictorial representation enables you to identify and resolve any delays or fallouts so that you can do the order fulfillment process more efficiently. To learn more, see:

- [Orchestration plans for order fulfillment](#)
- [Review an order orchestration plan](#)
- [Review and update the customer order fulfillment tasks](#)
- [Managing order fallout](#)

Related topics

[Order Management data model](#)

[Sold product creation for incoming customer orders](#)

[Customer order decomposition after fulfillment approval](#)

[Reviewing the product orders that are associated with a customer order line item](#)

[End]

[store-future: BEGIN review]

Review an order orchestration plan

Track the progress of an order in the fulfillment process by reviewing the orchestration plan for the order, its order line items, and domain product, service, or resource orders. By using the Orchestration Plan UI, you can easily identify and resolve any delays or fallouts so that you can do the order fulfillment process more efficiently.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

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

1. View a hierarchical visual representation of all order line items, domain orders, and order tasks for the selected order.
2. Open a node in the hierarchy and view the additional details.

3. Determine the current state of the associated order line items, domain orders, and order tasks.
4. Identify any order delays or fallouts in the order fulfillment process, and resolve them on time.

To learn more, see [Orchestration plans for order fulfillment](#).

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't currently using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#).

If you have an assigned order fulfillment manager or order fulfillment agent role, the Customer Order Management workspace appears. If the Customer Order Management workspace doesn't appear, do the following actions:

- a. From the Configurable Workspace Lists icon (, click **Customer Orders**.
 - b. Do one of the following actions:
 - To view all customer orders, click **All**.
 - To view only open, unfulfilled customer orders, click **Open**.
 - c. Select the customer order that you want to review, verify, approve, or fulfill:
 - To refresh the form, click the refresh icon ( - To filter existing customer orders, click the filter icon (
2. Access the Orchestration Plan UI for a selected customer order, customer order line item, or domain order by doing one of the tasks in the following table.
 3. Refresh the orchestration plan information for an order line item or size, or you can view the entire order hierarchy or access key transactions by using one of the controls in the following table.

Control	Description
	Refresh the Orchestration Plan UI for the order line item.
	Zoom into the orchestration plan.
	Zoom out of the orchestration plan.
	Fit the entire orchestration plan in the viewing area on your device.
	Expand or collapse the groups of data anywhere in the order hierarchy. For example, the number with the color background (

Control	Description
	3) at the bottom of the order line item level is the total count of child transactions (domain orders and order tasks). To expand or collapse a group of hierarchical data, do the following actions: a. To expand and view the hierarchy, click the transaction and then click this control to do the following actions: ▪ View the domain orders and order tasks that are associated with an order line item by first clicking the order line item element and then clicking the Expand/Collapse control. ▪ See the branches to each associated transaction that appears below the order line item. b. To collapse a group of hierarchy data after you're finished, click the Expand/Collapse control again. c. To drill into a underlying transaction, such as an order task, click the description of the ordered item. To access and view an individual transaction, such as an order line item, domain order, or order task, do the following actions: a. Click the description of the ordered item. For example, you can click an order task description to view the fulfillment work that requires completion, and then record its completion in the order task transaction. b. Learn more about the order tasks at Review and update the customer order fulfillment tasks.

4. On the Orchestration Plan UI, review the visual representation of the order, including all domain product, resource, service orders, order tasks, and their current states as described in the following table.

Orchestration Plan UI components

Field	Description
ORD	Unique system-assigned number for the customer order. Both customer orders and service orders have an assigned ID with a prefix of ORD.
Address, city, state	Orchestration plan hierarchy level that represents the individual shipping locations for the domain orders of an order line item.
Order line item	Orchestration plan hierarchy level that contains the individual order line items that are associated with each shipping location. An order line item can also contain child line items, which are shown in the order hierarchy. Each order line item contains the following elements:
	Description

Field	Description
	Description of the product or service ordered on this line item. Order line item identifier System-assigned customer or service order line item number. Task overview Overview of the total number of domain orders and order tasks that are associated with the order line item that have been fulfilled.
Domain orders and order tasks	Orchestration plan hierarchy level that contains the individual domain orders and order tasks for an order line item. A domain order can also contain child domain orders, which are shown in the order hierarchy. Each domain order or order task contains the following elements: Type Type of related transaction: - Domain order - Product Order, Service Order, or Resource Order - Order Task Description Description of the product or service on this domain order or order task. Identifier System-assigned domain product or order task number. State Current state of the domain product or order task. To learn more, see: Customer order states Service order states

[End]

[store-future: BEGIN review]

Review and update the customer order fulfillment tasks

Review and update the fulfillment tasks that are associated with a customer order, or order orchestration plan, so that you can make sure that all tasks are properly completed.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager

About this task

If you encounter issues with resolving or completing an order task, you can create fallout records. Fallout records enable you to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On Hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On Hold. A work order note with the message A fallout record F0nnnn has been created also appears.

If you create a manual fallout record or an automated one is generated for the order tasks, you can easily review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see [Managing order fallout](#).

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab () , click **Order Tasks**.
 - a. Do one the following options:
 - To view all open order tasks, click **All**.
 - To view only the tasks that are assigned to you, click **My Tasks**.
 - b. Select the order task that you want to work on.

Note:

You can also directly access the task records for an order from the Orchestration Plan UI. To learn more, see [Review an order orchestration plan](#).

3. For each order task, set the status and update the work notes, as required.
4. On the form, review the order task details and update as needed.

For information about the field descriptions, see [Order Task form](#).
5. When you finish reviewing and updating the order task or encounter issues that are preventing its closure, do one of the actions in the following table.

Result

After your agents complete all fulfillment tasks for the entire customer order, the following actions occur:

- The **State** field for the customer order is automatically set to **Completed**.
- The **State** field for each of the individual customer order line items is set to **Completed**.

[End]

[store-future: BEGIN review]

Service qualification requests

You can use the Technical Service Qualification API to evaluate a service request for feasibility and availability before you submit an order for fulfillment in the Order Management for Telecommunications application.

If orders are submitted without feasibility checks, the order fulfillment process may be delayed and lead to cancellations and order fallouts. When you make feasibility checks a part of the pre-ordering process, the order fulfillment process is more efficient, and unnecessary delays can be avoided.

Customer orders that have the fulfillment type as **Qualify** are captured from third-party customer order management systems through the [Technical Service Qualification Open API](#). You can use this API, which is a ServiceNow implementation of the TMF645 API, to request the qualification of services for:

- One or more service specifications with characteristics.

For example, you can make a qualification request to check if Voice over IP (VoIP) and Access Service with a download speed of 1 GBPS could be delivered at a specified address.

- Service specifications that use location information of an existing inventory.

For example, you can make a qualification request to check if VoIP and 4000 TV services can be delivered at the same location of an existing and active Access Service.

- Upgrading or downgrading an existing service.

For example, you can make a qualification request to check if the download speed can be upgraded to 500 Mbps for an existing Access Service.

Order fulfillment managers can review customer orders that are captured through this API and confirm the availability of services before submitting requests for delivery. The requests are then sent to the external inventory system for approval and the customer order is updated with the result. The following diagram shows the various steps in this process.

Technical Service Qualification process flow



[End]

[store-future: BEGIN review]

Review and approve service qualification requests

Review and approve customer orders captured through the Technical Service Qualification API.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfilment_manager,
sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.service_order_manager,
sn_ind_tmt_orm.service_order_agent

Procedure

1. Navigate to **All > Customer Order Management > Customer Order**.

2. Select an order with the Order type as **Service** and Fulfillment type as **Qualify**.

3. Click **Approve**.

The State field changes to **In Progress** and order decomposition occurs and service orders are generated for each customer order line item.

Note:

During order decomposition, only service orders are created, resource orders are not generated for service qualification requests.

4. Navigate to the Order Line Items tab, click on each Parent Line Item in the list and click **Qualify Order**.

Note:

The **Qualify Order** option is available only on the top order line items in the hierarchy.

- The Result field is updated to **Pending** and the [Process Qualification Request subflow](#) subflow is launched. After the subflow has been executed, depending on the response from the external inventory system, the Customer Order Result field is updated to one of the following:
 - **Qualified:** Requested service is available.
 - **Alternate:** Requested service is not available but an alternate proposal is available.
 - **Unqualified:** Requested service and alternate proposals are not available.
 - **None:** If any errors occur during the execution, the result is updated to **None**.
- The following business rules are invoked to derive the result:
 - **Update Line Item Qualification Result:** Propagates result from domain order to order line item.
 - **Update Qualification Result on Order:** Propagates result from top order line items to the customer order.

The Customer Order Result status is based on the status of the domain order and order line items. If the order line items have different or mixed results, the Result status is derived as follows:

Domain order	Order line item result
All domain orders are set to Qualified.	Qualified
All domain orders are set to Alternate.	Alternate

Domain order	Order line item result
All domain orders are set to Unqualified	Unqualified
All domain orders are set to None	None

Top Order Line Item	Customer Order Result
All top order line items are set to Qualified .	Qualified
At least one top order line item is set to Alternate and no items are set to Unqualified .	Alternate
At least one top order line item is set to Unqualified	Unqualified
At least one top order line item is set to None	None

Manually updating the qualification request

You can manually update the Result field in two ways:

- Update the *qualificationresult* field in the *api/sn_ord_qual_mgmt/qualification/checkServiceQualification/processResult* API for all the order line items.
- Update the Result field on the Domain Order, Order Line Item, and top Order Line Item forms. The Result field on the Customer Order is also updated.

Data model changes

The following forms have been updated to process service qualification requests:

- Customer order
 - Result: Can be None, Qualified, Unqualified, Alternate, or Pending.
 - Fulfillment code: Readonly field.
- Order line item

Result: Can be None, Qualified, Unqualified, Alternate, or Pending.
- Domain order
 - Result: Can be None, Qualified, Unqualified, Alternate, or Pending.
 - Unavailability reason

[End]

[store-future: BEGIN review]

Process Qualification Request subflow

This subflow generates a qualification request based on the customer order, sends the request to the third party inventory system, and executes the integration request.

Generate qualification request

In the first step of the subflow, a TMF-641 compatible payload to be sent to the inventory system is generated. The *serviceQualificationItem* list in the payload consists of the service order information, the hierarchy, and all the characteristics. A sample payload is shown here:

```
{
  serviceQualificationItem : [ 3 items ]
  0 : {
    qualificationItemRelationship : [ 1 item ]
    0 : {
      relationshipType : HasParent
      id : 92bc88fbe5bfd110f87741b459ef19fd
    }
  }
  service : { 4 props }
  @type : ServiceQualificationItem
  action : add
  id : 1ebcc8fbe5bfd110f87741b459ef1914
}
1 : {
  qualificationItemRelationship : [ 2 items ]
  0 : {
    relationshipType : HasChild
    id : 1ebcc8fbe5bfd110f87741b459ef1914
  }
  1 : {
    relationshipType : HasChild
    id : 96bcc8fbe5bfd110f87741b459ef1911
  }
}
service : { 4 props }
@type : ServiceQualificationItem
action : add
id : 92bc88fbe5bfd110f87741b459ef19fd
}
2 : {
  qualificationItemRelationship : [ 1 item ]
  service : { 4 props }
  @type : ServiceQualificationItem
  action : add
  id : 96bcc8fbe5bfd110f87741b459ef1911
}
```

In this example, you can see that the *serviceQualificationItem* has multiple service orders and you can also see the hierarchy or the parent and child relationships between them.

Execute integration request

This step launches the Order Qualification Request integration request type from the Spoke selector. The payload information specified in the first step of the subflow and the top order line item from the customer order are accepted as inputs. This information is then sent using an API

call to the third party inventory system and the response is received either synchronously or asynchronously and Result field is updated in the customer order.

If the response is received asynchronously, the response should be passed to the Process Qualification Response. Along with the result, if the response has additional information related to alternate service proposal or eligibility unavailability reason, this information is updated for the corresponding service order. A sample response is shown here:

```

{
  serviceQualificationItem : [ 3 items ]
  0 : {
    qualificationItemRelationship : [ 1 item ]
    qualificationResult : qualified
    service : {
      @type : Service
      serviceSpecification : {
        name : DSL Access Service
        internalVersion : 1
        id : 3aea8913b7d69910ff00f203ae11a964
      }
      place : {
        @type : Place
        id : 5671dd2ec3a53010188473ce3640dd81
      }
      serviceCharacteristic : [ 1 item ]
      0 : {
        name : DSL Speed
        value : value
      }
    }
    @type : ServiceQualificationItem
    action : add
    id : 1ebcc8fbe5bfd110f87741b459ef1914
  }
  1 : {
    qualificationItemRelationship : [ 2 items ]
    0 : {
      relationshipType : HasChild
      id : 1ebcc8fbe5bfd110f87741b459ef1914
    }
    1 : { 2 props }
  }
  qualificationResult : qualified
  service : { 4 props }
  @type : ServiceQualificationItem
  action : add
  id : 92bc88fbe5bfd110f87741b459ef19fd
}
  2 : {
    qualificationItemRelationship : [ 1 item ]
    qualificationResult : qualified
    service : { 4 props }
    @type : ServiceQualificationItem
    action : add
    id : 96bcc8fbe5bfd110f87741b459ef1911
  }
}
result : qualified
expectedQualificationDate : 2023-10-11 22:20:39
qualificationResult : pending
effectiveQualificationDate : 2023-12-15 07:44:44
@type : CheckServiceQualification
description : check service qualification illustration
}

```

As you can see this example response, the *qualificationResult* is set to Qualified for all the service orders in the hierarchy and the final *result* is also set to Qualified.

[End]

[store-future: BEGIN review]

Post Processing Qualification Request subflow

This subflow is used to complete customer order line items that have been captured through the Technical Service Qualification API.

If all the domain orders are set to **Closed Complete**, this subflow updates the status of the top order line items to **Completed**. When all the top order line items have been marked as **Completed**, the corresponding customer order is completed.

[End]

[store-future: BEGIN review]

Edit the Order Qualification Request

Use the Order Qualification Request integration request type in the Order Management for Telecommunications application to process the customer order qualification requests and retrieve the results from the external inventory systems.

Before you begin

Role required: admin

About this task

The Order Qualification Request type is used to integrate order management with third-party inventory systems. You can specify the following information:

- Integration request inputs: Inputs for the customer order qualification request which include the top order line item and payload details.
- Integration request definition: Definition for the condition and the subflow that invokes the API call to the third-party inventory system.

Procedure

1. Navigate to **All > Spoke selector > Request type**.

2. Click the **Order Qualification Request** integration request type.

In the Order Qualification Request integration request type page, you can see the Demo Order Qualification Implementation request definition listed under the Integration request definitions tab. This is a sample request definition that invokes the Demo Order Qualification (Mock Response) subflow, simulates the response from a third-party inventory system, and updates the qualification request.

You must add a new request definition, specify the conditions and create a subflow that you can use to invoke the API call to the third-party inventory system. You can create one or more request definitions depending on the number of external systems being used.

3. Click **New** to add a new request definition.

Note:

To add a new request definition, you must be in the Order Management for Telecommunications and Media scope.

4. Enter the name for the request definition and specify the conditions.

5. In the Request adapter field, select the subflow that will communicate with the third-party system to update the customer order and click **Submit**.

- Each request type can have multiple request definitions. For example, if you have multiple inventory systems or vendors, depending on the system you want to invoke, you can add multiple request definitions for each system. You must create a separate spoke to interact with each vendor or third-party system, create a flow within the spoke, and point the request adapter to this flow.
- For more information on how to create a spoke, see [Spokes](#) . As shown in the demo subflow, ensure that the response from the third-party system passed to the Process Qualification Response block.
- When the Process Qualification Request subflow is invoked, the response from the third-party inventory system is received either synchronously or asynchronously, and the Result is updated in the customer order.

[End]

[store-future: BEGIN review]

Alternate proposal related list

Appears as a related list for service orders with an **Alternate** Result status.

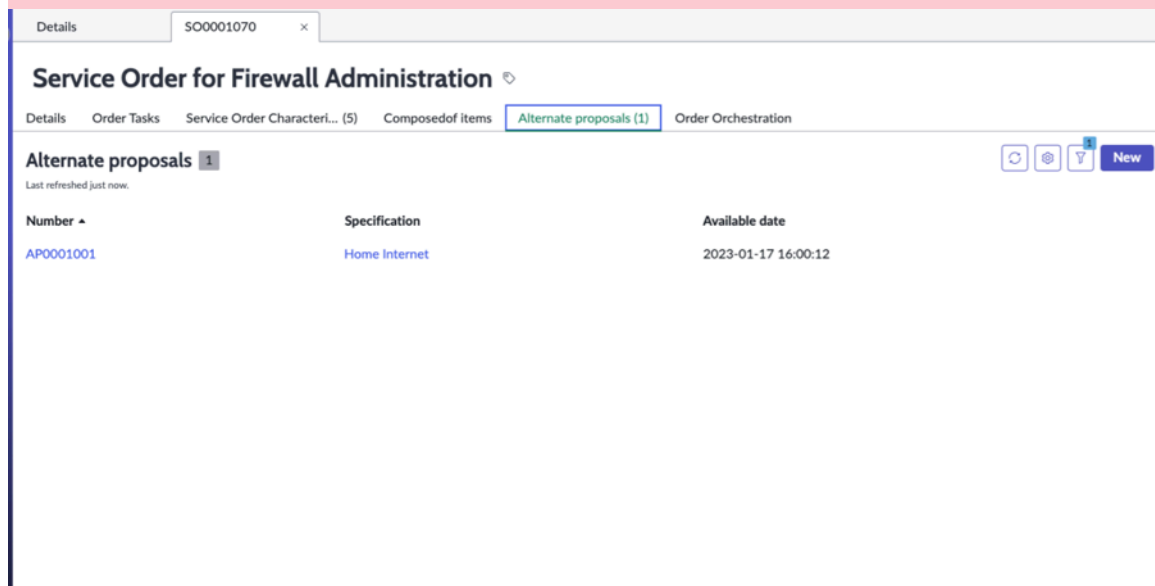
Qualification requests can be created for a service specification using information from existing inventory. If the requested service with the specified characteristics or date is not available, an alternate proposal may be provided. The alternate proposal can be similar to the requested one or may be the same service but available on a different date.

When you receive an alternate qualification request and click **Qualify Order** in the top level order line item form, the Result field is updated to **Alternate** and a list of alternate proposals are listed in the Alternate proposals related list. A single service order can have multiple alternate proposals. This list can also be manually updated by the service order agent.

Note:

When you initiate a new qualification request is initiated and receive an alternate proposal for a service order, any existing alternate proposal entries will be deleted before new entries are created.

Navigate to the **CSM/FSM Configurable Workspace**, click on a service order with Fulfilment type as **Qualify** and select the **Alternate proposal(s)** tab.



The screenshot shows the 'Service Order for Firewall Administration' interface. The top navigation bar includes 'Details', 'Order Tasks', 'Service Order Characteri...', 'Composed of items', 'Alternate proposals (1)', and 'Order Orchestration'. The 'Alternate proposals (1)' tab is selected. Below the tab, there is a table with the following data:

Number	Specification	Available date
AP0001001	Home Internet	2023-01-17 16:00:12

Click the Number link to view the alternate proposal. It contains the following information:

Field name	Description
Number	Number of the alternate proposal.
Domain order	The domain order for which the alternate proposal is created.
Specification	The alternate service specification that has been proposed.
Available date	The date on which the alternate proposal will be available.
Order characteristics	The specification characteristics (in JSON format) provided as part of the alternate proposal in the response from the inventory system.

[End]

[store-future: BEGIN review]

Creating, reviewing, approving, and fulfilling service orders

Service Order Management (SOM) is a domain of order management that is responsible for the end-to-end life cycle of service requests. Learn how service orders are captured, Order Management, and how your fulfillment managers and agents review, orchestrate, and fulfill them.

Service order capture

Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates. By using this process, you ensure that service orders are correct and handled efficiently throughout the entire fulfillment process.

Most of the service orders that you process are captured from third-party customer order management systems through the Service Order Open API. The Service Order Open API is a ServiceNow implementation of the TM Forum TMF641 Service Ordering Open API specification. To learn more, see [Service Order Open API](#).

Service order direct entry

You can also use Order Capture as needed to directly enter service orders into the ServiceNow AI Platform. To learn more, see [Creating orders for new services, service changes, or disconnections](#).

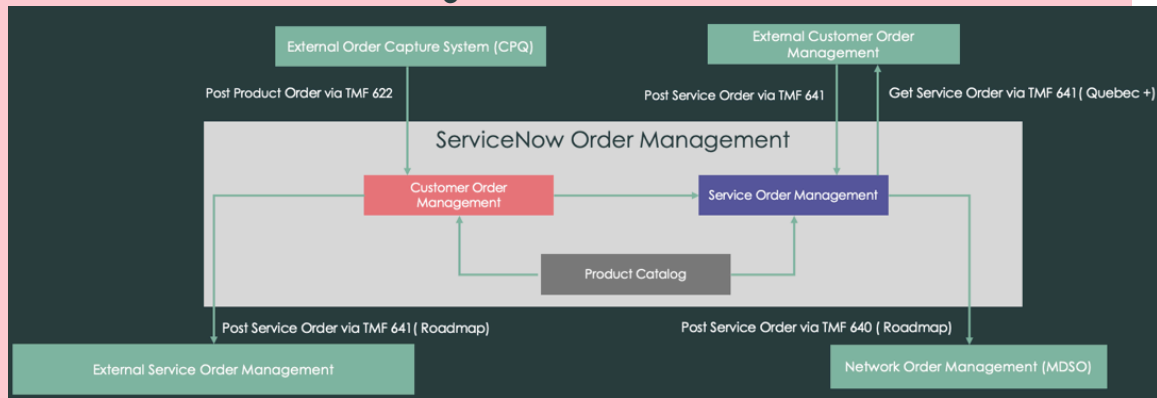
Post-capture service order record generation

When you capture or directly enter a service order, a service order record is generated in the ServiceNow AI Platform to manage service order fulfillment. It has one or more associated service order line items that describe a service and the action (Add, Change, or Disconnect) that is required to perform for the service. The service order line item also consists of the following:

- The details of the services that are being added, updated, or deleted.
- For Add new service activations, the details of the service specification, including the required characteristics and characteristic values.
- For Change and Disconnect service orders, the details of the service inventory that you're updating or disconnecting.
- The location and related information such as the customer contact details.

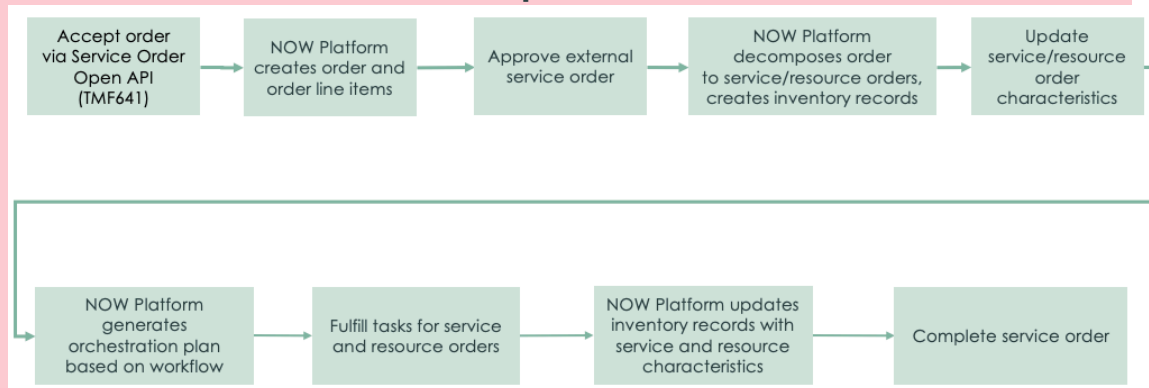
The following diagram provides you with an understanding of how Service Order Management relates to external capture systems.

Customer and service order management



The following diagram provides you with an understanding of what processing takes place when you capture a service order. The processing flow for service orders is similar to that for customer orders, but with some differences that you will learn about in this section.

Service order fulfillment workflow example



Service order review, approval, and decomposition

After you capture a service order, the service order manager selects it in the Service Order Management workspace in Configurable Workspace Home. The service order manager verifies the service order, the service order line items, and the order characteristics, and then approves or rejects the service order.

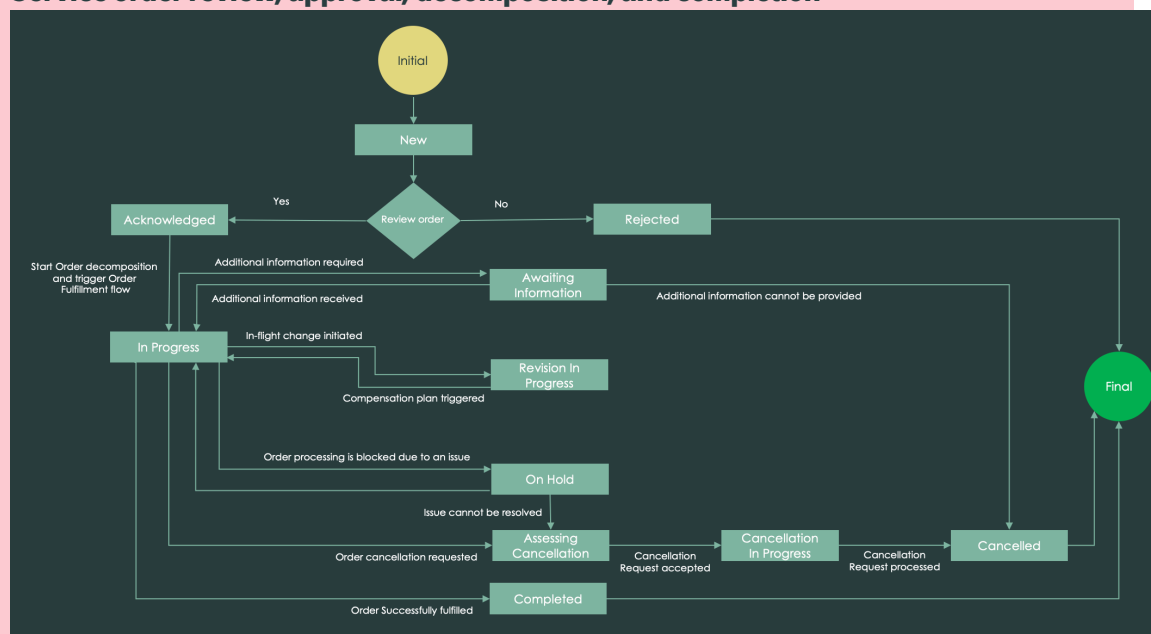
Note:

To process service orders, the service order manager uses the same forms that are used to manage customer orders. To learn more about service order management roles and the approval process, see the following:

- [Assigning order fulfillment and provider roles](#)
- [Reviewing service orders](#)
- [Select, review, revise, or request cancellation of a service order](#) Review the line items and related details for a service order

The following diagram details the service order review, approval, decomposition, and completion process.

Service order review, approval, decomposition, and completion



If the service order manager rejects a service order because the data is incorrect or invalid, the following occurs:

- The state of the service order moves to Rejected.
- The service order may require several changes from the service order manager to bring it back to a normal state.

If the service order manager approves a service order, the following process occurs:

- The **State** field changes to In Progress.
- Service order decomposition takes place next. Decomposition is based on the service specification, specification relationships, and decomposition rules in the catalog. This process creates all required service and resource orders for each approved service order line item and then triggers the order fulfillment workflow for each domain order.
- To learn more, see the following:
 - [Create specification relationships and decomposition rules](#)
 - [Approving and fulfilling service orders](#)
 - [Service order decomposition after fulfillment approval](#)

Differences between the pre- and post-approval service orders

Like customer orders, captured service orders also have an ID with a prefix of ORD(nnn). The **Order Category** field in the order forms indicates if the order is for a **Product** (a customer order) or a **Service** (a service order). These labels enable you to identify the type of order.

When you approve a captured service order for fulfillment, the post-approval decomposition process generates actionable service orders and resource orders. You may see a single service order, multiple service orders, and resource orders that are associated with your approved service order.

- Service orders with a prefix of SO(nnn) are referred to as domain orders. These orders, and their related resource orders, with a prefix of RO(nnn), must be fulfilled to complete the service order line items on the captured service orders.
- The resource order manages the resources required to fulfill the services that the customer is requesting.
- These domain orders manage the fulfillment of the requested service orders.

To learn more, see [Service order decomposition after fulfillment approval](#).

Service order fulfillment tasks

After the decomposition process is complete, order tasks are assigned to a service order agent, who works through the tasks and updates the service order. If there are any remaining order tasks that can't be completed, you can create fallout records for tracking and further research. To learn more, see [Creating, reviewing, approving, and fulfilling service orders](#).

After all fulfillment tasks are complete, the following actions occur:

- The **State** field for the service order is set to Closed complete.
- The **State** field for each of the individual service order line items is set to Completed.
- The sold product record is updated with the state of Active for Add type service orders or Inactive for disconnect type service orders.
- All characteristics of the service and resource specifications are updated in the Product Characteristics [sn_ind_tmt_orm_product_characteristics] table.

Note:

For more information, see [Reviewing and updating the service order fulfillment tasks](#).

Related topics

[Install and configure Order Management](#)

[End]

[store-future: BEGIN review]

Creating orders for new services, service changes, or disconnections

With Order Capture, your service agents can directly enter multi-site service orders with one or more services on behalf of your customers. They can also manually create service change requests and disconnect orders in the ServiceNow AI Platform. Order Capture is supported in the San Diego release and later releases.

Note:

To learn more about creating customer (product) orders in Order Capture, see [Creating, changing, and cancelling manual product orders](#).

When to use Order Capture for a direct service order entry

Most service orders that you process in the ServiceNow AI Platform are automatically captured from third-party order management systems through the Service Order Open (TMF641) API.

Your agents can use Order Capture to create manual service orders with additional services that have been identified as customer needs during order fulfillment. They can also create orders to change or disconnect services. When you create a manual service order, the following actions occur:

1. You select and configure the service specifications and then perform reviews before submission.
2. When you submit the service order, the ServiceNow AI Platform creates a service order record to manage the order fulfillment. A service order has one or more associated order line items that describe the services being performed.
3. To review or modify a service order after you've submitted it, use the same procedures that you use for all other orders, regardless of their origin. To learn more, see [Reviewing service orders](#).
4. After the service managers complete their order review, they can approve (or reject) the order for fulfillment by service agents. To learn more about reviewing and fulfilling service orders, regardless of their source of origin, see [Approving and fulfilling service orders](#).

[End]

[store-future: BEGIN review]

Ordering a new service

As a provider, use Order Capture to create a service order in the ServiceNow AI Platform for your customers or internal personnel.

Before you begin

Complete the following configuration tasks before you use Order Capture:

1. Assign the order fulfillment and provider roles to your users.
2. Define and publish your customer-facing service specifications.
3. Configure order fulfillment.

To learn more, see [Configuring Order Management for providers](#).

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

About this task

Here's how a service order is created:

1. In the Create Order form, you select the **Service** order type, and then select a customer account and contact.
2. In the Select Service form, you select one or more service specifications and destination locations for the service order.
3. In the Configure Service form, you configure each service order line item, apply those service configurations to one or more locations, and then configure the ordered service configurations by location.
4. In the Review Order form, you review and submit the service order.
5. A service manager can now review and approve it for fulfillment. To learn more, see [Creating, reviewing, approving, and fulfilling service orders](#).

When you directly enter a service order, it creates a service order record in the ServiceNow AI Platform to manage the service order fulfillment. A service order has one or more associated order line items, which describe the services being performed.

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. Access Order Capture from the **Configurable Workspace Lists** tab.

3. Depending on whether you are creating an order for an existing customer account, or first creating a customer account before you create the order, you can select one of the following actions.
4. When the Choose an order type dialog appears, select **Order a new service** and click **Create**.

[End]

[store-future: BEGIN review]

Select the customer account and contact

Select the customer account and contact information for the order as the next step in the process to create a customer order.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

Procedure

1. In the form, fill in the fields.

New Service Order - Create order form

Field	Description
Account	Name of the customer account. Select the account that you are creating the service order for. To filter the customer list and find a specific account, type the first few letters of the customer's name.
Contact	Name of the contact for the service order. To filter the customer contact list and find a specific contact, type the first few letters of the contact name.

2. Click **Continue**.

The ServiceNow AI Platform creates a service order record with a Draft state, but with no order line items. To learn more about the order states, see [Service order states](#).

[End]

[store-future: BEGIN review]

Select the locations and service specifications for the service order

Select the destination locations and service specifications as the next step in the process to create a service order. You select the customer's destination locations and then add the specifications for the services that you're performing in the designated customer location.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

Procedure

1. When the Choose at least one location dialog appears in Select Specifications, select the destination location or locations that you're performing the customer-facing services at.

Note:

Alternately, to access the Choose at least one location dialog, in the Locations pane, click **Add Location**.

- a. Place your cursor in the **Locations** field, click the field, and then select a location. The available address selections come from the customer account that you selected in the Create Order form. To filter the customer address list and find a specific location, type the first few letters of the location name.
- b. To select another location, place your cursor to the right of the previous selection and then select another one.
- c. To remove a selected location, click **X**.
- d. Click **Add**.

The selected destination locations for the order appear in the Locations pane. To add another location, or delete a previously selected location, do the following actions:

2. In the Locations pane, select the location that you want to deliver a service specification to, and then add the location contact, service specifications, and order quantities for the location:
 - a. In the Location Contact section, enter the first name, last name, email address, and mobile number for the contact person for the selected location.
 - b. In the Specifications section of the Select Products pane, for the selected location, do the following actions:
 - Select the specifications for the services that you're performing at the location.
 - Enter an order quantity for each of the service specifications.

Select Specifications - Specifications

Field	Description
Specifications *	Published specification for the service that the customer is requesting to be performed at the selected destination location. Examples might include installation, configuration, and repair services. You can select multiple service specifications for each selected location: i. Select a service specification from the list of published customer-facing service specifications. To filter the service specifications list and find a service specification, type the first few letters of the product name. ii. To select another service specification, place your cursor to the right of the previous selection, and then select another one. iii. To remove a selection, click X.
Quantity *	Quantity of the product that the customer is ordering in the selected location. The default quantity is 1.

Field	Description
	To delete a location, select the location, and then click the delete location icon ().

- c. To add another service specification for this location, click **Add Specifications**, and repeat the process for selecting a service specification and entering an order quantity.

3. When you are finished adding the service specifications for all locations, click **Configure Items**.

The ServiceNow AI Platform creates order line items for each location, and associates them to the service order. For example, if you selected three locations and two service specifications for each location, the ServiceNow AI Platform creates an order line item for each location. Each line item contains the service specifications that you selected for that location.

What to do next

You can configure the characteristic values for each selected service specification, based on its service specification relationships. You change the characteristic values in the Configure Specifications form.

[End]

[store-future: BEGIN review]

Configure the order line details for the service order

Make sure that all the order line item details are correct and complete, as part of the next step in the process to create a service order.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

About this task

You can configure the service order line item details, modify the order characteristics for the service specification, and add or remove order line items as needed. An optional configuration copy function enables you to copy a service specification, its characteristics, and characteristic values from one destination location to another location.

Every service specification has a set of characteristics and characteristic options:

- The characteristics are generic, which means that they are associated to one or more service specifications. Use a characteristic or characteristic option to describe the service attributes.
- For each ordered service, you can configure and update the characteristic option selections that are associated with it.

To learn more, see:

- [Product catalog data model and catalog versioning](#)
- [Create the characteristics and characteristic options for your product offerings](#)

Procedure

1. In the Order Line Items (n) section, select the service specification to configure.

A  **Missing Info** message appears if an order line item is incomplete and requires entry of more details.

Click the message to find out what information is missing. The most common errors that usually appear to indicate that you must fill in some missing information such as a shipping address or order characteristics for the order line item.

2. To review the general details for the selected service order line item, click **Details**.

New Service Order - Order Line Item

Field	Description
Order Line	Unique system-assigned number of the order line item.
Service specification	Specification for the service that the customer is requesting. To learn more, see Create and publish service specifications .
Location	Location that you are performing the service at.
Ordered quantity	Ordered quantity for this order line item. You can change this quantity as needed.

3. To review the characteristic options and values for the service order line item, click **Characteristics**.

New Service Order - Characteristics

Field	Description
Characteristic	Characteristic that is assigned to the service specification. Examples of characteristics include speed, capacity, size, configured settings, hardware, and software.
Characteristic Value	Selectable option fields for the mandatory characteristics that are associated with the service specification. For each field, select the option that your customer selected.

4. To update or enter values for characteristic options selections with **(empty)** indicators, do the following actions:

- a. In the Characteristics pane, click the open preview icon (i) that appears in the Details columns to the left of the one you want to update.
- b. An Order Characteristics window appears with the following information.

Field	Description
Characteristic *	Characteristic that is assigned to the service specification.

Field	Description
Characteristic Value	Value text field that you can enter the value information for the characteristic that you are updating. - Use these fields only if the ● Missing Info message appears in the Order Line Items (n) pane. This field indicates that an order line item is incomplete and requires you to enter more details. - For example, for an Installation Service, you can enter the customer's phone number.

c. After reviewing and updating the characteristic options and values, click **Update**.

5. To copy the characteristic values for a specification from a destination location to another location, or from one service specification to another specification, do the following actions.

For example, let's say that you sold a Premium SD-WAN Offering for the customer's Santa Clara location and also want to sell it for the customer's San Francisco location.

- a. In the Order Line Items (n) section, select the service specification that you want to clone. In this example, it would be the service specification for the Santa Clara location that you are copying from.
- b. Click **Details** to return to the Details - Order Line Item pane.
- c. In the **Specification** field, click the copy order line item configuration icon (.
- d. A Select locations to copy this configuration window appears with the information that is shown in the following table.

Select locations to copy this configuration

Field	Description
Location *	Name of the location that you selected to copy a service configuration from.
Service Specification *	Name of the service specification that you selected to copy a service configuration from.
Copy To Locations *	Names of the locations that you want to copy the service configuration to. i. Click the Locations field, and then select a location. ii. To select another location, place your cursor to the right of the previous selection and then select another one. Repeat this process until you select all destination locations.

- e. After selecting the copy to locations, click **Copy**. The following message appears if the copy process is successful:

✓ You have successfully copied configurations



This process copies the specifications hierarchy for the selected service specification from its selected location to the specified copy to locations.

- For example, it copies the specification hierarchy for the Managed Firewall Service in Santa Clara to the selected San Francisco location. It also copies the associated characteristic options and values.
 - If the same specification line items exists in the destination location, it copies the characteristic options and values.
6. To add related items for your customer orders with horizontal relationships, do the following actions.
7. When you finish reviewing and updating the service order line item, perform one of the following actions.
8. Upon clicking the **Review** button, validation of the related items of the customer order occurs and it navigates you to the order submission page.

Option	Description
If the validation is successful	The ServiceNow AI Platform displays the following message: Provided related inventory/order line items are compatible. This message confirms that the order information doesn't require any additional input and you can proceed to the next steps of the order fulfillment.
If the validation is unsuccessful	The ServiceNow AI Platform displays one of the following messages: ○ For Order line item (ORDLn): One or more related inventory/order line items are not compatible. Provide the correct dependent inventory details prior to closure of the related domain orders. ○ For Order line item (ORDLn): One or more related items are required. Provide the related inventory details prior to closure of the related domain orders. This message confirms that the order information requires additional details for its decomposition. You can provide the required information to proceed for the next process of the order fulfillment.

[End]

[store-future: BEGIN review]

Review and submit the service order

Review all the service order line items as the next step in the process to create a customer order. Edit the order details as needed before submitting it for fulfillment approval.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

About this task

To learn more about order review and fulfillment approvals, see [Approving and fulfilling service orders](#).

Procedure

1. On the New Service Order form, review the general details for the service order line items.

New Service Order form

Field	Description
Order Line	Unique system-assigned service order line item number.
Service Specification	Service specification that is associated with the order line item.

2. To update the details for a specific service order line item, do the following actions:
 - a. Click the open preview icon () to the left of the order line item that you want to update. A pane opens to the right with the **Detail** and **Activity** tabs.
 - b. In the **Details** pane, fill in the order line item information as needed. When finished, click **Update** to update the order line item details.
 - c. In the **Activity** pane, enter a free-form comment or internal work order text for the service order line item:
 - Text that you enter into the **Comments** block can be viewed by anyone, including your customer.
 - Text that you enter into the **Work notes (Private)** block can only be viewed by your internal personnel.
 - d. When you are finished entering comments or private work notes, click **Post Comments**.
3. To submit it for fulfillment approval, click **Submit Order**.
4. When the Submission successful confirmation message appears, click **OK**.

Result

When you formally submit the service order, its state changes from Draft to New. A service manager can now review and approve it for fulfillment. To learn more, see [Approving and fulfilling service orders](#).

[End]

[store-future: BEGIN review]

Change a service order inventory record

As a provider, learn how to change a service order inventory record in the ServiceNow AI Platform for your customers.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. To change a service order inventory record for an existing customer account, do the following actions:
 - a. From the **Configurable Workspace Lists** tab () , click **Service Orders**.
 - b. To select all orders, click **All** or to select an order, click **Open**.
 - c. Click **New**.
3. When the Choose an order type dialog appears, select **Change a service** and click **Create**.

Choose an order type dialog

✕

Choose an order type

 Order a new product	 Order a new service
 Change a product	 Change a service
 Cancel a product	 Disconnect a service

Cancel
Create

[End]

[store-future: BEGIN review]

Select a customer's account and contact information

Select a customer's account and contact information as the first step in the process to change a service inventory record.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

Procedure

1. On the form, fill in the fields.

Service change - Create order form

Field	Description
Account	Name of the customer account. To filter the customer list and find an account, enter the first few letters of the customer's name.
Contact	Name of the contact for the service order. To filter the customer contact list and find a contact, enter the first few letters of the contact name.

2. Click **Continue**.

Result

The ServiceNow AI Platform creates a service order record with a Draft state, but with no order line items. To learn more about the order states, see [Service order states](#).

[End]

[store-future: BEGIN review]

Select the service inventories from the available inventory

Select the service inventories from the available inventory as the next step in the process to change a service inventory record.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

About this task

When you go to the Select Service form, the ServiceNow AI Platform displays a list of active service inventories in the content tree. This list is based on the location for your customer account. You can select the service inventories by clicking the expand icon () or the collapse icon () in the content tree. If the service inventories list is long, you can browse the list by clicking through the pages.

You can use a filter to find the service inventories that you're going to change for your customer. For more information, see [Search and view a service inventory by using a filter](#).

Note:

Your available inventory includes all the product or services that are ordered by your customer and successfully fulfilled by you.

Procedure

1. To select a service inventory directly from the list of inventories, choose an inventory and then click **Select**.

To choose all the service inventories that are available on each page, click **Select all** and then click **Select**.

To choose the entire list of service inventories, click **Select all** on all the pages in the content tree.

Note:

To select service inventories by using a filter, see [Search and view a service inventory by using a filter](#).

2. In the Select all pane, click the service inventories that you want to change and click **Select**. If you want to remove the selection from any service inventories, place your cursor anywhere in the service order inventory and click **Unselect**.

If you want to remove the selections from all the service inventories, select **Reset** and click **Yes**.

3. In the service inventory information pane, review the order details and characteristic information, and click **Configure**.

What to do next

You can configure the characteristic values for each service specification, based on its service specification relationships. You change the characteristic values in the Configure Specifications form.

[End]

[store-future: BEGIN review]

Search and view a service inventory by using a filter

Search and view your customer's service inventory records faster by using a filter as the next step in the process to change a service order inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Click the **Locations** field and then select a location.
The available addresses are the customer locations that have the existing, active product inventories of the customer account that you selected in the Create Order form. To enter a customer's address and find a location, enter the first few letters of the location name.
2. To select another location, place your cursor to the right of the previous selection and then select a location.
3. To remove a location, click **X**.
4. Click the **Service Specification** field and then select a service specification.

The available service specifications come from the selected service offering that is based on the customer order.

After you select the service specification, you can use a filter that is based on the product characteristics. To add the characteristics and values, click **Add characteristics** and do the following actions:

- a. Click the **Characteristic** field and then select a characteristic. The available characteristics come from the service specifications that you selected.
- b. Click the **Values** field and then select a value. The available values are from the service specifications that you selected.

- To select another value, place your mouse device to the right of the previous selection and then select a value.
- To remove a value, click **X**.

To add another characteristic, or delete a previously selected characteristic, do the following actions:

5. Click **Apply**.

Result

The filtered services inventory appears in the Select all pane.

[End]

[store-future: BEGIN review]

Verify the order line item details

Verify that all the order line item details are correct and complete as the next step in the process to change a service inventory record.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you change a service inventory record, the ServiceNow AI Platform creates the order line items from the specifications that you have defined. In a change service order inventory, the order line items are created only for your selected service inventories. If you select inventories that are top-order parent items, the order line items are created only for the parent items, not for the child order items.

For example, let's say that your customer wants to change the services for the Firewall administration and Threat and Intrusion Prevention Service. After you select these service inventories, the ServiceNow AI Platform creates two order line items for this change service order, one for the Firewall administration and another for the Threat and Intrusion Prevention Service. If you select the Managed Firewall Service inventory, which is the parent order item, only one order line item is created.

You can configure the details for a service order line item, modify the order characteristics for a service specification, and add or remove order line items as needed. An optional configuration copy function enables you to copy a service specification, its characteristics, and characteristic values from one destination location to another location.

Every service specification has a set of characteristics and characteristic options:

- The characteristics are generic, which means that they are associated to one or more service specifications. Use a characteristic or characteristic option to describe the service attributes.
- For each ordered service, you can configure and update the characteristic option selections that are associated with it.

To learn more, see:

- [Product catalog data model and catalog versioning](#)
- [Create the characteristics and characteristic options for your product offerings](#)

Procedure

1. In the Order Line Items (n) section, select the service specification that you want to configure.
A  **Missing Info** message appears if an order line item is incomplete and requires that you enter more details.

Click the message to find out what information is missing. A common error is related to filling out some missing information, such as a shipping address or order characteristics, for the order line item.

2. To review the general details for the selected service order line item, click **Details**.

Service Change - Details - Order Line Item tab

Field	Description
Order Line	Unique system-assigned number of the order line item.
Service specification	Specification for the service that the customer is requesting to change. To learn more, see Create and publish service specifications .
Location	Location of the service order inventory that you want to change.

3. To review the characteristic options and values for the service order line item, click **Characteristics**.

Service Change - Characteristics tab

Field	Description
Characteristic	Characteristic that is assigned to the service specification. Examples of characteristics include speed, capacity, size, configured settings, hardware, and software.
Characteristic Value	Selectable option fields for the mandatory characteristics that are associated with the service specification. For each field, select the option that your customer selected.

4. To update or enter values for the characteristic options selections with **(empty)** indicators, do the following actions:
 - a. In the Characteristics pane, click the open preview icon () that appears in the Details columns.
 - b. When the Order Characteristics window appears, fill in the fields:

Field	Description
Characteristic*	Characteristic that is assigned to the service specification.
Characteristic Value	Value text field that you can enter the value information for the characteristic that you are updating. - Use these fields only if the ● Missing Info message appears in the Order Line Items (n) pane. This field indicates that an order line item is incomplete and requires you to enter more details. - For example, for an Installation Service, you can enter the customer's phone number.

c. After reviewing and updating the characteristic options and values, click **Update**.

5. To copy the characteristic values for a specification from a destination location to another location, or from one service specification to another specification, do the following actions.

For example, let's say that you sold a Premium SD-WAN Offering for the customer's Santa Clara location and also want to sell it for the customer's San Francisco location.

- a. In the Order Line Items (n) section, select the service specification that you want to clone. In this example, it would be the service specification for the Santa Clara location that you are copying from.
- b. Click **Details** to return to the Details - Order Line Item pane.
- c. In the **Specification** field, click the copy order line item configuration icon (.
- d. When the Select locations to copy this configuration window appears, fill in the fields.

Select locations to copy this configuration

Field	Description
Location *	Name of the location that you selected to copy a service configuration from.
Service Specification *	Name of the service specification that you selected to copy a service configuration from.
Copy To Locations *	Names of the locations that you want to copy the service configuration to. i. Click the Locations field, and then select a location. ii. To select another location, place your cursor to the right of the previous

Field	Description
	selection and then select another one. Repeat this process until you select all destination locations.

e. Click **Copy**. The following message appears if the copy process is successful:

✓ You have successfully copied configurations



This process copies the specifications hierarchy for the selected service specification from its selected location to the specified copy to locations.

- For example, it copies the specification hierarchy for the Managed Firewall Service in Santa Clara to the selected San Francisco location. It also copies the associated characteristic options and values.
- If the same specification line items exist in the destination location, it copies the characteristic options and values.

6. To add related items for your customer orders with horizontal relationships, do the following actions.

7. When you finish reviewing and updating the service order line item, do one of the following actions.

[End]

[store-future: BEGIN review]

Review the order line items and submit the change order for the service inventory

Review all the service order line items as the last step in the process to change a service inventory record. Edit the order details as needed before submitting it for fulfillment approval.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

To learn more about order review and fulfillment approvals, see [Approving and fulfilling service orders](#).

Procedure

1. On the New Service Order form, review the general details for the service order line items.

New Service Order form

Field	Description
Number	Unique number for the system-assigned service order line item.
Service Specification	Service specification that is associated with the order line item.

2. To update the details for a service order line item, do the following actions:

- a. Click the open preview icon () next to the order line item that you want to update. A pane opens with the **Detail** and **Activity** tabs.
- b. On the **Detail** tab, fill in the order line item information and click **Update**.
- c. On the **Activity** tab, enter a free-form comment or internal work order text for the service order line item:
 - Text that you enter into the Comments block can be viewed by anyone, including your customer.
 - Text that you enter into the Work notes (Private) block can be viewed only by your internal personnel.
- d. Click **Post Comments**.

3. Click **Submit Order**.

4. When the Submission successful confirmation message appears, click **OK**.

Result

When you formally submit the service order, its state changes from Draft to New. A service manager can now review and approve it for change. To learn more, see [Approving and fulfilling service orders](#).

[End]

[store-future: BEGIN review]

Disconnect a service

As a provider, disconnect a service, or service order, in the ServiceNow AI Platform for your customers. For example, you might want to disconnect your current 4G connectivity to upgrade it to 5G connectivity.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.

2. To cancel a service order inventory for an existing customer account, do the following actions:

- a. From the **Configurable Workspace Lists** tab () , click **Customer Orders**.
- b. To select all orders, click **All** or to select an order, click **Open**.
- c. Click **New**.

3. When the Choose an order type dialog appears, select **Disconnect a service** and click **Create**.

Choose an order type dialog

The screenshot shows a dialog box titled "Choose an order type" with a close button (X) in the top right corner. The dialog contains six buttons arranged in a 3x2 grid:

- Order a new product (Icon: Building with a plus sign)
- Order a new service (Icon: Building with a plus sign)
- Change a product (Icon: Document with a plus sign)
- Change a service (Icon: Document with a plus sign)
- Cancel a product (Icon: Document with a minus sign)
- Disconnect a service (Icon: Document with a minus sign, highlighted with a blue border)

At the bottom right of the dialog are two buttons: "Cancel" and "Create".

[End]

[store-future: BEGIN review]

Select a customer's account and contact information

Select the customer account and contact information as the first step in the process to disconnect a service for your customer.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. On the form, fill in the fields.

Service cancellation - Create Order form

Field	Description
Account	Name of the customer account. To filter the customer list and find an account, enter the first few letters of the customer's name.
Contact	Name of the contact for the service order. To filter the customer contact list and find a specific contact, enter the first few letters of the contact name.

2. Click **Continue**.

Result

The ServiceNow AI Platform creates a service order record with a Draft state, but with no order line items. To learn more about the order states, see [Service order states](#).

[End]

[store-future: BEGIN review]

Select the service inventories from the available inventory

Select the service inventories from the available inventory as the next step in the process to disconnect a service for your customer.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you go to the Select Service form, the ServiceNow AI Platform displays the list of active service inventories in the content tree. This list is based on the location for your customer account. You can select the service inventories by clicking the expand icon () or the collapse icon () in the content tree. If the service inventories list is long, you can browse the list by clicking through the pages.

You can use a filter to find the service inventories that you're going to disconnect for your customer. For more information, see [Search and view a service inventory by using a filter](#).

Note:

Your available inventory includes all the product or services that are ordered by your customer and successfully fulfilled by you.

Procedure

1. To select a service inventory directly from the list of inventories, choose an inventory and then click **Select**.

To choose all the service inventories that are available on each page, click **Select all** and then click **Select**.

To choose the entire list of service inventories, click **Select all** on all the pages in the content tree.

Note:

To select service inventories by using a filter, see [Search and view a service inventory by using a filter](#).

2. In the Select all pane, click the service inventories that you want to change and click **Select**. If you want to remove the selection from any service inventories, place your cursor anywhere in the service order inventory and click **Unselect**.

If you want to remove the selections from all the service inventories, select **Reset** and click **Yes**.

3. In the service inventory information pane, review the order details and characteristic information, and click **Configure**.

What to do next

You can configure the characteristic values for each selected service specification, based on its service specification relationships. You change the characteristic values in the Configure Specifications form.

[End]

[store-future: BEGIN review]

Search and view a service inventory by using a filter

Search and view your customer's service inventory records faster by using a filter as the next step in the process to disconnect a service.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

Procedure

1. Click the **Locations** field and then select a location.

The available addresses are the customer locations that have the existing, active product inventories of the customer account that you selected in the Create Order form. To enter a customer's address and find a location, enter the first few letters of the location name.

2. To select another location, place your cursor to the right of the previous selection and then select a location.
3. To remove a location, click **X**.
4. In the **Service Specification** field, select a service specification.

The available service specifications come from the service offering that is based on the customer order.

After you select the service specification, you can use a filter that is based on the product characteristics. To add the characteristics and values, click **Add characteristics** and do the following actions:

- a. Click the **Characteristic** field, and select a characteristic. The available characteristics come from the service specifications that you selected.
- b. Click the **Values** field, and select a value. The available values come from the service specifications that you selected.
 - To select another value, place your cursor to the right of the previous selection and then select another value.
 - To remove a selected value, click **X**.

To add another characteristic, or delete a previously selected characteristic, do the following actions:

5. Click **Apply**.

Result

The filtered services inventory appears in the Select all pane.

[End]

[store-future: BEGIN review]

Review the order line items and submit the cancel order for the service inventory

Review all the service order line items as the last step in the process to disconnect a service. Edit the order details as needed before submitting it for fulfillment approval.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, or sn_ind_tmt_orm.order_fulfillment_manager

About this task

When you're canceling a service order inventory, the ServiceNow AI Platform creates the order line items from the specifications that you've defined. To cancel a service order inventory, if your selected inventories are top-order parent items, the order line items are created for both the parent items and the child order items. If your selected inventories are child order items, the order line items are created only for the child items.

For example, your customer requests that you disconnect the service for Managed Firewall Service. After you select the service inventory, the ServiceNow AI Platform creates four order line items for this disconnect service, one for the Managed Firewall Service and one for each of the three child order items, such as Firewall administration, Threat and Intrusion Prevention Service, and Firewall and DMZ. If you selected any of the three children inventories, only one order line item is created for the selected child inventory.

To learn more about order review and fulfillment approvals, see [Approving and fulfilling service orders](#).

Note:

For change and disconnect type of customer orders, the below message is displayed.

This validation is not applicable for order line items with change or disconnect action.

Procedure

1. On the Service cancellation form, review the general details for the service order line items.

Service cancellation form

Field	Description
Number	Unique number for the system-assigned service order line item.
Service Specification	Service specification that is associated with the order line item.

2. To update the details for a service order line item, do the following actions:
 - a. Click the open preview icon () to the left of the order line item that you want to update. A pane opens to the right with the **Detail** and **Activity** tabs.
 - b. In the **Detail** tab, fill in the order line item information as needed. When finished, click **Update** to update the order line item details.
 - c. In the **Activity** tab, enter a free-form comment or internal work order text for the service order line item:
 - Text that you enter into the Comments block can be viewed by anyone, including your customer.
 - Text that you enter into the Work notes (Private) block can only be viewed by your internal personnel.
 - d. Click **Post Comments**.
3. Click **Submit Order**.
4. When the Submission successful confirmation message appears, click **OK**.

Result

When you formally submit the service order, its state changes from Draft to New. A service manager can review and approve it for cancellation. To learn more, see [Approving and fulfilling service orders](#).

[End]

[store-future: BEGIN review]

Reviewing service orders for fulfillment

Learn how your order fulfillment manager can review service orders for fulfillment by using the Order Management application. With this application, you can make sure that your service orders are fulfilled correctly.

Service order review and approval tasks

After the ServiceNow AI Platform captures a service order, the service order manager selects and verifies the order, line items, and characteristics data, and then approves or rejects it. Learn how this process triggers the order fulfillment flow and creates the required tasks to fulfill the service order.

Service order review and approval tasks

Task	Description
1. Select a telecommunications service order.	Review the account, contact, and date details to make sure it is correct and complete. You can also revise or request a cancellation of the service order.
2. Review the service order line items.	For each order line item, make sure that the Location field is properly populated in each service order line item.
3. Review and update contact information for the service order line item.	Ensure all associated customer contact information is correct for the selected service order line.
4. Review the product specifications that are associated with the service order line item.	Update the customer line item as needed. A product specification is a template that you can use to define, at a functional level, a product that a provider sells to the customer.
5. Review order characteristics for the service order line item.	Ensure that the customer's selections are correct.
6. After you are satisfied that all order details are correct, approve the service order for fulfillment processing.	In the service order form, click Approve. Note: If you and your enterprise customer are using Service Exchange, a message appears that states the customer's instance has been updated accordingly. Only service order managers with an assigned [sn_ind_tmt_orm.service_order_manager] role can approve service orders.

Service order review and approval tasks (continued)

Task	Description
7. Perform the tasks required for post-approval service order fulfillment.	Ensure that the service order is properly fulfilled.

[End]

[store-future: BEGIN review]

Select, review, revise, or request cancellation of a service order

Review the account, contact, pricing, and date details on a telecommunications service order to make sure that it is correct and complete. You can also revise or request a cancellation of the service order.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All > Service Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned Service Order Manager or Service Order Agent role, the Service Order Management workspace appears. If the Service Order Management workspace doesn't appear, do the following actions:

- a. From the Configuration Workspace Lists icon () click **Service Orders**.
- b. Do one of the following:
 - To view all service orders, click **All**.
 - To view only open, unfulfilled service orders, click **Open**.

Note:

To learn more about creating or updating service order details, see [Select, review, revise, or request cancellation of a service order](#).

c. Select the service order that you want to review, verify, and approve:

- To refresh the form, click the refresh icon (.
- To filter existing service orders, click the filter icon (.

2. Select the service order to review by clicking the appropriate tile.

For information about field descriptions, see the Service Order Management workspace fields section in [Service Order Management workspace and Customer Order forms in Order Management for Telecommunications and Media](#).

3. On the Customer Order form, review the order number, account, and contact information for the selected service order.

4. To revise or request cancellation of the service order, perform one of the following actions.

Note:

To learn more about inflight order changes, see [Managing inflight order changes and cancellation requests](#).

5. In the service order, make the required changes, and then click **Save**.

[End]

[store-future: BEGIN review]

Reviewing the details for a service order

Review the account, contact, dates, line items, and related details on the selected service order to make sure that everything is correct and complete. You perform these tasks in the same Customer Orders form that you use to review customer orders.

Before you begin

Role required: sn_ind_tmt_orm.service_order_agent, sn_ind_tmt_orm.service_order_manager

Procedure

1. To review the service order and date details for the entire service order, click **Details**.

- To show the Details pane in the full screen, click the show form in full screen icon (.
- To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon ( (default).
- To show the Activity pane in the full screen, click the show activity in full screen icon (.

2. In the Details pane, review the general details for the service order.

For information about the field descriptions, see the Customer Order Details pane - service order fields section in [Service Order Management workspace and Customer Order forms in Order Management for Telecommunications and Media](#).

3. Review the remaining details for the service order.

For information about the field descriptions, see the Customer Order Details pane - other service order details fields section in [Service Order Management workspace and Customer Order forms in Order Management for Telecommunications and Media](#).

4. Review the line items, characteristics, and fulfillment tasks for the service order.

Task	Description
Review the order line items and related details	See Review the line items and related details for a service order .
Review the order characteristics	See Review and update the characteristic values on a service order .
Review the order fulfillment tasks	See Reviewing and updating the service order fulfillment tasks .

5. When you finish reviewing and updating the entire service order, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review the line items and related details for a service order

Review the line items and the related details of the selected service order to make sure that all line items and details are correct and complete. The related details include the service order line item characteristics and contacts.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.service_order_manager

About this task

By using the Order Line Item and Order Characteristic forms together, you can do the following actions:

- View an existing service order line item.
- View, add, change, or delete a new characteristic of a service order line item. To learn more, see [Select, review, revise, or request cancellation of a service order](#).

Procedure

1. Navigate to **All > Service Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned Service Order Manager or Service Order Agent role, the Service Order Management workspace appears. If the Service Order Management workspace doesn't appear, do the following actions:

- a. From the Configuration Workspace Lists icon (, click **Service Orders**.
- b. Do one of the following:
 - To view all service orders, click **All**.
 - To view only open, unfulfilled service orders, click **Open**.

Note:

To learn more about creating or updating service order details, see [Select, review, revise, or request cancellation of a service order](#).

- c. Select the service order that you want to review, verify, and approve:

- To refresh the form, click the refresh icon (.
- To filter existing service orders, click the filter icon (.

2. In the Service Order Management workspace, to select the service order, click the appropriate tile.

For information about the field descriptions, see the Service Order Management workspace fields section in [Service Order Management workspace and Customer Order forms in Order Management for Telecommunications and Media](#).

3. After selecting and opening the service order in the Customer Order form, click **Order Line Items (n)** to view the service order line item details.
(n) represents the number of the total number of line items for the service order. The Order Line Items form appears.

4. In the **Order Line** field, select an existing service order line item to review.

5. On the form, review the details for the selected service order line item.

For information about field descriptions, see the Order Line Item form - line item details fields section in [Order Line item forms \(service orders\) in Order Management for Telecommunications and Media](#).

6. To save any updates that you made to the service order line item, click **Save**.

What to do next

As needed, review and update the related contact, order characteristic values, and order tasks.

Note:

If you create a manual fallout record or an automated one is generated for the order tasks, you can easily review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see [Managing order fallout](#).

[End]

[store-future: BEGIN review]

Review and update the characteristic values on a service order

Review and update the characteristic option values that are associated with a service order to make sure that the customer's selections are correct.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.service_order_manager

About this task

Service specifications have a set of related characteristics and characteristic options. The characteristics are generic and are associated to one or more service or resource specifications. Each characteristic has a certain input type (check box, list, attachment) and can have one or more characteristic options. To learn more, see [Product catalog data model and catalog versioning](#).

Procedure

1. To view the order characteristic values that are associated with a service order line item, locate the service order line item that you want to view.
To learn more, see [Review the line items and related details for a service order](#).
2. Click **Order Characteristics (n)**, where (n) is the number of service characteristics that are associated with the selected service order line item.
3. On the form, review the service order characteristics values and update as needed.

For information about the field descriptions, see [Order Characteristics Values form](#).

4. When you finish reviewing and updating the service order characteristics, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review and update the contacts for a service order line item

Review and update your customer's current contact information that is associated with a service order line item so that you can make sure that your customer's information is always correct.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

You can also add, change, or delete customer contacts as needed.

Procedure

1. To view the customer contacts that are currently associated with a service order line item, locate the service order line item that you want to view.
To learn more, see [Review the line items and related details for a service order](#).
2. Click **Order Line Item Contacts**.
3. On the form, fill in the fields.

Order Line Item Contacts form

Field	Description
First Name	First name of the customer contact.
Last Name	Last name of the customer contact.
Business Phone	Business phone number for the customer contact.
Email	Email address for the customer contact.

4. To add or delete a service order customer contact, perform one of the following actions.

[End]

[store-future: BEGIN review]

Approving and fulfilling service orders

Learn how your organization can perform post-approval service order fulfillment. By using this application, you can ensure that your service orders are fulfilled correctly.

Your service order manager and order fulfillment agent must do the approval and fulfillment tasks that are described in the following table.

Post-approval service order processing tasks

Task	Description
Review a service order and approve or reject it for fulfillment.	A service order manager approves or rejects a service order for fulfillment. If it's approved, the sold product and order decomposition processing can take place. If it's rejected, more investigation is needed. To learn more, see: • Approving or rejecting service orders for fulfillment • Sold product creation for incoming service orders • Service order decomposition after fulfillment approval
Review the service specifications and domain service orders that are associated with the approved service order.	A service order manager reviews the domain service orders that were generated for the service order line item. To learn more, see: • Review and update the service specifications for service order line item • Review the domain resource orders that are associated with a service order
Use the Orchestration Plan UI to review the domain orders and order tasks that are associated with the approved service order.	A service order manager reviews the orchestration state and hierarchical structure for a selected service order, its associated order line items, domain orders, and order tasks. By using the Orchestration Plan UI, the service order manager can see how much progress has occurred in the fulfillment process. To learn more, see Reviewing orchestration plans and fulfilling orders.
Review and update the fulfillment tasks that are associated with a service order.	An order fulfillment or service order agent does the tasks that are required for post-approval customer order fulfillment, including marking the order tasks as complete. The order fulfillment or service manager then creates the order fallout records for the order tasks that can't be completed. To learn more, see: • Reviewing and updating the service order fulfillment tasks • Managing order fallout

Post-approval service order processing tasks (continued)

Task	Description
Follow up on the tasks that couldn't be completed by examining the order fallout records and reassigning them for more investigation.	An order fulfillment or service manager reviews the tasks that couldn't be completed in the order fallout records, and reassigns the order tasks to fulfillment agents for investigation and resolution.
	To learn more, see, Review a fallout record .

[End]

[store-future: BEGIN review]

Approve or reject a service order for fulfillment

Select a service order, and review the account, contact, and date details to make sure that the order is correct and complete. If you are a service order manager, you can approve or reject a service order with a New state for fulfillment.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

Note:

If the following error message appears in the San Diego release or above after approving an order, it indicates that a required upgrade script was not run.

Some of the OMT tables need reparenting. Please contact administrator to execute the reparenting script.

The Post Upgrade Script performs required order management table reparenting and column promotion. If the script hasn't been run, the order decomposition and order fulfillment functions won't function as designed until your system administrator runs it. To learn more, see [Restructured Order Management tables \(San Diego release and above\)](#).

Procedure

1. Navigate to **All > Service Order Management > Workspace > Configurable Workspace Home**.

Note:

If you aren't using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) .

If you have an assigned Service Order Manager or Service Order Agent role, the Service Order Management workspace appears. If the Service Order Management workspace doesn't appear, do the following actions:

- a. From the Configuration Workspace Lists icon (, click **Service Orders**.
- b. Do one of the following:
 - To view all service orders, click **All**.
 - To view only open, unfulfilled service orders, click **Open**.

Note:

To learn more about creating or updating service order details, see [Select, review, revise, or request cancellation of a service order](#).

c. Select the service order that you want to review, verify, and approve:

- To refresh the form, click the refresh icon (.
- To filter existing service orders, click the filter icon (.

2. Select the service order to review by clicking the appropriate tile.

For information about field descriptions, see the Service Order Management workspace fields section in [Service Order Management workspace and Customer Order forms in Order Management for Telecommunications and Media](#).

3. On the Customer Order form, review the order number, account, and contact information for the selected service order.

4. To approve or reject fulfillment of a service order in a New state, perform one of the following actions.

[End]

[store-future: BEGIN review]

Sold product creation for incoming service orders

Learn how the Order Management for Telecommunications, Media, and Technology application creates and maintains the customer service inventory. By using this application, you can maintain an accurate inventory of your customer services.

Overview

The sold product configuration stores the service specifications and services, both customer-facing and resource-facing, that are associated with a service order.

New order workflow

The new order workflow is as follows:

1. After the service order manager approves the service order, the Sold Product characteristics [sn_prd_pm_characteristics] record is created. This record has placeholders for all the specifications that are generated after decomposition. The associated models have an Installation Pending state.
2. During the fulfillment process, when the service and resource orders are closed, the state of the associated specification updates to Active in the record.
3. When you close the service order, all the characteristics that are associated with the specifications on the service order update the record.

Change order workflow

The change order workflow is as follows:

1. After the service order manager approves the service order, the state of the changed or removed specifications are updated to Change Pending. The models that are associated with the changed specifications are also updated to reflect the latest model that is generated due to the change.

2. During the fulfillment process, when the service and resource orders are closed, the state of the associated specification updates to Active in the Sold Product characteristics [sn_prd_pm_characteristics] record.
3. When you close the service order, all the characteristics that are associated with the specifications on the service order update the record.
4. If the change order included a product that is discontinued, the state of the associated sold product is moved to Closed.

[End]

[store-future: BEGIN review]

Service order decomposition after fulfillment approval

Learn how a service order is decomposed into its domain orders for fulfillment.

Overview

When a service order manager approves a service order, processing takes place to decompose the service order into its domain order for fulfillment. Domain orders, which are the service and resource orders that are generated during decomposition, are based on the specifications and specification relationships that are defined in the product catalog.

Service order approval

1. A service order manager validates each service order to ensure that the orders and line items have the required details for fulfillment processing. A service order manager verifies the following:

Order aspect	More information
Service order characteristics	See Review and update the characteristic values on a service order .
Location information	See the section titled Fulfilling a multi-site order in Reviewing orchestration plans and fulfilling orders .

2. During the verification, the service order manager can also make corrections or update some required characteristics.
3. After the verification is complete, the service order manager can approve the service order by clicking the **Approve** action on the Customer Order form.

Approving the service order sets the state of the order to Acknowledged and starts the decomposition process. If the service order manager rejects the service order, decomposition doesn't take place.

Service order line decomposition

When a service order is approved, order decomposition occurs. In this process, the service and resource orders are generated for each captured service order line item. The generation of these orders is based on the specifications, specification relationships, and the decomposition rules that are defined in the product catalog between the service, and resource specifications. To learn more about this process, see the following:

- [Create specification relationships and decomposition rules](#)
- [Review the domain service orders that are associated with a product](#)

Note:

Unlike the decomposition process for customer orders, service order decomposition doesn't generate a product order.

Decomposition that is based on specification relationships

Specification relationships define the relationships between product, service, and resource specifications. Specification relationships and decomposition rules specify how a service order is decomposed, fulfilled, and delivered to your customer. For example, in the SD-WAN Service Package demo data, the following occurs:

- A specification relationship was defined between the SD-WAN Controller product specification and its required service specifications.
- The service specification details the services that are required for the product. For example, when a captured service is received for the SD-WAN Controller product, a service order is generated for the SD-WAN Controller Service.

Decomposition runs on the specification that is associated with the captured service order line item and its hierarchy of specifications. It works as follows:

- If the relationships between the source and target specifications are Bundles, Realized as, or Requires types, the product, service, or resource orders are created for the target specification. This action takes place when the captured service order is decomposed.
- Decomposition establishes the hierarchical relationship between the source and targets while generating the service and resource orders.
- Decomposition doesn't happen if the specification relationship is of a Composed of type.

Note:

To learn more about specification relationship types, see [Create specification relationships and decomposition rules](#).

Decomposition that is based on defined decomposition rules

Specification relationships define the relationships between product, service, and resource specifications. When you define specification relationships, you can optionally create decomposition rules. Specification relationships and decomposition rules dictate how a service order is decomposed, fulfilled, and delivered to the customer.

The best way to view a decomposition rule is as an exclusion rule. You use decomposition rules to exclude the creation of domain orders when you receive a service order that doesn't contain a specific characteristic or characteristic option.

For example, in the Managed firewall service demo data, the Managed Firewall service is defined as a customer-facing service specification. It has a relationship with the following three resource-facing service specifications:

- Firewall Administrator
- Firewall and DMZ
- Threat and Intrusion Prevention service

Each of these resource-facing service specifications has relationships with the corresponding resource specifications that are required to deliver the Managed Firewall service.

- If the relationships between the source and target specifications are Bundles, Realized as, or Requires types, decomposition creates the following types of orders for the target specification:
 - A corresponding customer-facing service order (CFS), which is a service order that is generated for performance of customer-faced services.
 - A resource-facing service order (RFS), which is a service order that is generated for internal use of resources required to perform the actual services for the customer.
 - Resource order.
- Decomposition establishes the relationship between the source and targets while generating domain service orders and resource orders. The following elements comprise the specification relationship:
 - The source specification is the specification that is defining the specification relationship.
 - The target specification is the specification that the relationship is being defined to.
 - Both values are automatically defined when the decomposition rule was created for the specification relationship.

Optional decomposition rules are defined for a specification relationship between a source specification and a target specification. The rules use the characteristic and characteristic value (optional) of a source specification, for mapping to a target specification. These rules enable targeted order decomposition of a source specification that is based on the characteristic and characteristic value available in the source specification.

Note:

To learn more about specification relationships and decomposition rules, see [Create specification relationships and decomposition rules](#).

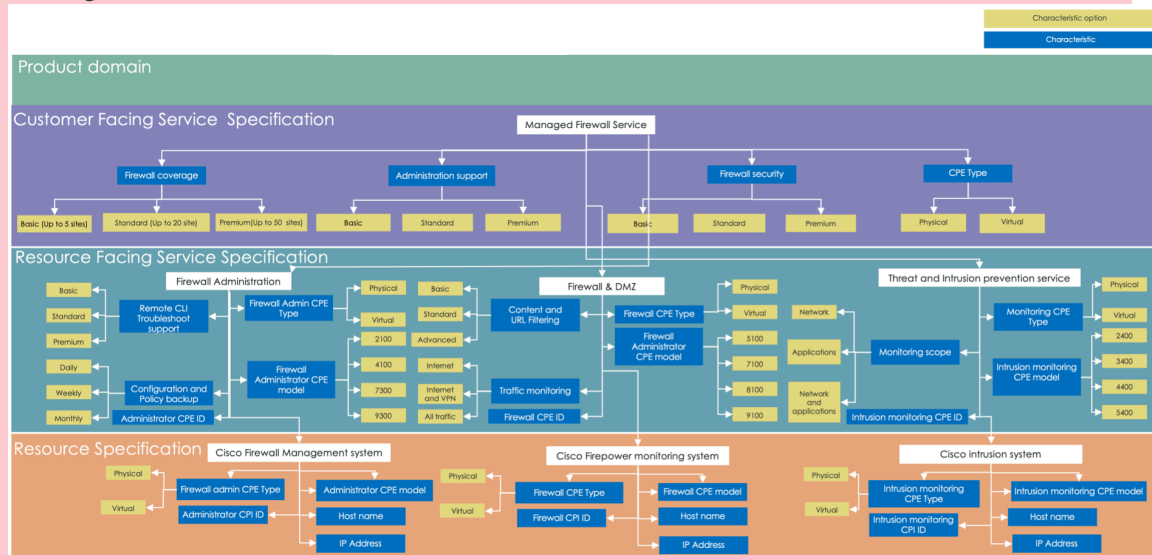
Specification relationship and decomposition rule example

The Managed Firewall service demo data is an example of a customer facing service specification that has a Requires relationship with the following three resource-facing service specifications:

- Firewall Administrator
- Firewall and DMZ
- Threat and Intrusion Prevention service

As shown in the following example, each resource-facing service specification has relationships with the corresponding resource specifications that are required for Managed Firewall service delivery. The decomposition process creates an RFS service order only when the corresponding characteristic is available in the order line item for the Managed Firewall service specification.

Managed Firewall Service structure

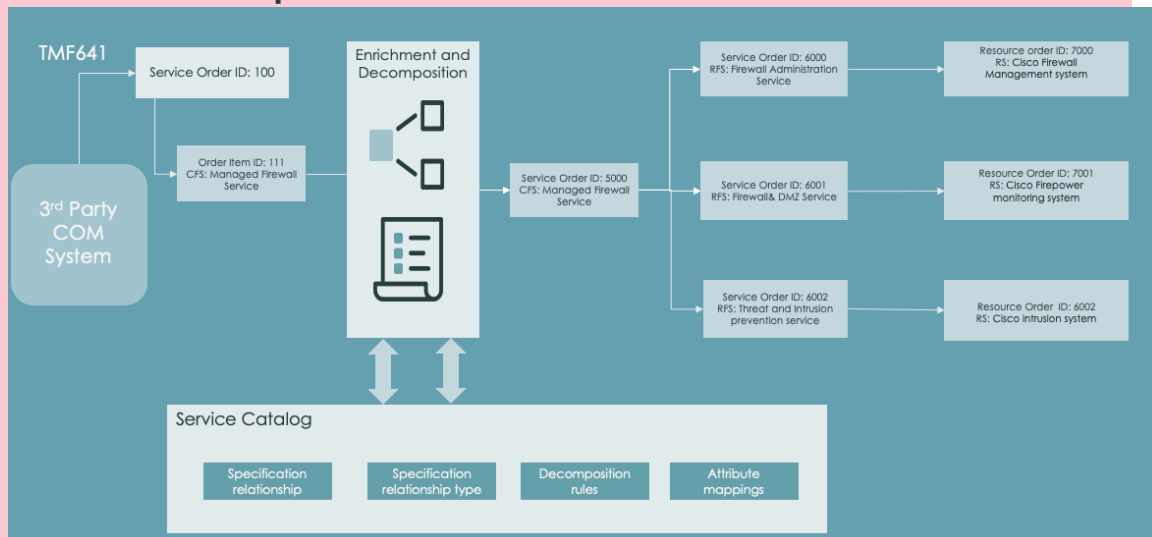


After receiving a service order for adding a Managed Firewall service, a service manager reviews and approves it. This process triggers decomposition, which creates the RFS service orders and resource orders. The service order has one order line item for the Managed Firewall service, which includes all of its characteristics. The service order decomposition process creates the following:

- A CFS service order for Managed Firewall service.
- Three RFS service orders for all three RFS specifications.
- Three resource orders for resource specifications.

The decomposition and fulfillment process is shown in the following diagram:

Service order decomposition and fulfillment



Next, the ServiceNow AI Platform triggers a fulfillment workflow for the decomposed service and resource orders. This workflow generates the required order tasks for fulfilling the domain orders and uses decision tables to identify the workflow for a decomposed order. The selected workflow is based on various attributes in the original service order. These attributes include the specification category, and an order line item action (Add, Change, or Delete), among others.

To learn more about decision tables, see [Decision tables](#):

[End]

[store-future: BEGIN review]

Reviewing the domain service orders that are associated with a service order line item

Review the domain service orders that were generated for a selected service order line item so that you can make sure that all the related details are correct and complete.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

The domain service orders manage the fulfillment of the services that you are rendering for the product the customer requested service for.

Procedure

1. To view the service orders that are associated with an order line item, select the order line item.
To learn more, see [Review the line items and related details for a service order](#).
2. Select an existing service order to review or create a service order.
3. On the form, add a service order, or review the selected service order details and update as needed.
 - To show the Details pane in the full screen, click the show form in full screen icon (.
 - To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon ( (default).
 - To show the Activity pane in the full screen, click the show activity in full screen icon (.
4. When you finish reviewing and updating the service order, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review and update the service specifications for a service order line item

Review and update the service specifications for a service order line item so that you can make sure that the specifications are correct and complete. A service specification is a template that you can use to define, at a functional level, a product that a service provider sells to the customer.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

To learn more about product specifications, see [Create and publish service specifications](#).

Procedure

1. To view the service orders for a customer line item, select the order line item.
To learn more, see [Review the line items and related details for a service order](#).
2. In the **Service Specification** field, select a service specification to review.
When you select a service specification, the service specification form appears.
3. On the form, review the service specification, and update as needed.

For information about field descriptions, see the Service specifications fields section in [Service order-related domain order forms in Order Management for Telecommunications and Media](#).

4. When you finish reviewing and updating the service order service specification, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review the domain resource orders that are associated with a service order

Review the domain resource orders that were generated for a selected service order line item so that you can ensure that all the related details are correct and complete.

Before you begin

Role required: sn_ind_tmt_orm.service_order_manager

About this task

The domain resource orders manage the resources required for fulfillment of the services that you are rendering.

Procedure

1. To view the resource orders that are associated with an order line item, select the order line item.

To learn more, see [Review the line items and related details for a service order](#).

2. Select an associated resource order to review or create a resource order.

3. On the form, add a resource order, or review the selected resource order detail and update as needed.

For information about the field descriptions, see the Domain resource orders fields section in [Service order-related domain order forms in Order Management for Telecommunications and Media](#).

4. When you finish reviewing and updating the resource order, perform one of the following actions.

[End]

[store-future: BEGIN review]

Review and update the service order fulfillment tasks

Review and update the fulfillment tasks that are associated with a service order, or order orchestration plan, so that you can make sure that all tasks are properly completed.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.service_order_manager

About this task

If you encounter issues with resolving or completing an order task, you can create fallout records. Fallout records enable you to identify, investigate, and resolve order processing issues so that orders can continue processing through to completion.

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On Hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On Hold. A work order note with the message A fallout record F0nnnn has been created also appears.

If you create a manual fallout record or an automated one is generated for the order tasks, you can easily review and track all fallout records for a specific order. Use the **Fallouts (n)** tab (where n is the number of fallouts) that appears when you view the related customer or service order in the Customer Order form.

To learn more about order fallout, see [Managing order fallout](#).

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab () , click **Order Tasks**.
 - a. Do one the following options:
 - To view all open order tasks, click **All**.
 - To view only the tasks that are assigned to you, click **My Tasks**.
 - b. Select the order task that you want to work on.

Note:

You can also directly access the task records for an order from the Orchestration Plan UI. To learn more, see [Review an order orchestration plan](#).

3. For each order task, set the status and update the work notes, as required.
4. On the form, review the order task details and update as needed.

For information about the field descriptions, see [Order Task form](#).

5. When you finish reviewing and updating the order task, or encounter issues preventing its closure, do one of the actions in the following table.

Result

After your agents complete all fulfillment tasks for the entire service order, the following actions occur:

- The **State** field for the customer order is automatically set to **Completed**.
- The **State** field for each of the individual customer order line items is set to **Completed**.

[End]

[store-future: BEGIN review]

Managing inflight order changes and cancellation requests

Manage how your organization receives changes for customer orders, service orders or individual line items that are still being orchestrated and fulfilled. By using inflight change order management, you can designate when you permit such changes. You can also assess the

impact of the requested changes for an order or order line item, and automatically generate a plan to compensate for them when you approve the revision or cancellation request.

Overview of inflight changes and cancellations

An inflight order is an order that is in the process of being orchestrated and fulfilled but has some work pending. Inflight changes and cancellations can occur in large enterprise orders. An inflight order change refers to a change that is issued for an order line item that is currently undergoing fulfillment and pending completion.

Enterprise telecommunications order management is complex. It can take weeks or months to fulfill a multi-site order. Enterprise orders can involve the large-scale purchases of products and services, often for multiple locations around the world. Inflight orders can go through revisions that incorporate changes that are submitted by customers or identified by internal personnel during the order fulfillment process.

To revise an inflight order or order line items that have already been decomposed to suborders, service provider employees have to assess the impact of the requested changes. If there is no data-driven process and framework, users try to manage the changes with manual tasks that can lead to delays in the order delivery process and result in poor customer and employee experiences.

Prerequisites

You can define the following change types and flow actions that affect inflight order change processing in your organization. See the following table for the prerequisite tasks that you can do.

Types of Inflight order changes

Order change requests typically originate from your customers for purchased products and services or from internal personnel, such as order fulfillment agents, when they are managing their fulfillment. When you submit an inflight order revision, you assign a change type to track the types of order changes that are submitted by users. The ServiceNow AI Platform supports Characteristic, Contact, Quantity, related items, and Price change types.

Customer-initiated requests

Based on the types of customer requests, you update an inflight order to do the actions that are listed in the following table.

Customer-driven order changes

Type of change	Example
Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact information for an order line item for a product or service in a location.	A customer supplies a new email address or the name and telephone number of a new corporate contact.
Incorporate changes that are related to pricing details.	A customer requests a reduction to a non-recurring charge or a monthly recurring charge on an order line item.
Add a product or service to an order.	A customer wants to add a new item to an existing order.

Customer-driven order changes (continued)

Type of change	Example
Increase or decrease the quantity of order line items in a product or service order.	A customer wants a higher or lower the quantity of an existing order.
Add, change, or cancel a product or service, or product or service options, in a related domain product or service order.	A customer wants to update the characteristic value of a product or service that the customer ordered at an earlier date. For example, the customer wants to change the speed of an internet service from 100 Mbps to 500 Mbps.
Incorporate changes that are applicable to the related items of a product or service order.	A customer wants to add or change an item to an order that has horizontal relationships. To learn more, see Defining a horizontal relationship .

Fulfillment user-initiated requests

To expedite the completion of the order fulfillment process, the order fulfillment or service order agents and managers often request changes to product, service, or resource orders. Based on the types of internal requests, you update an inflight order to do the actions listed in the following table.

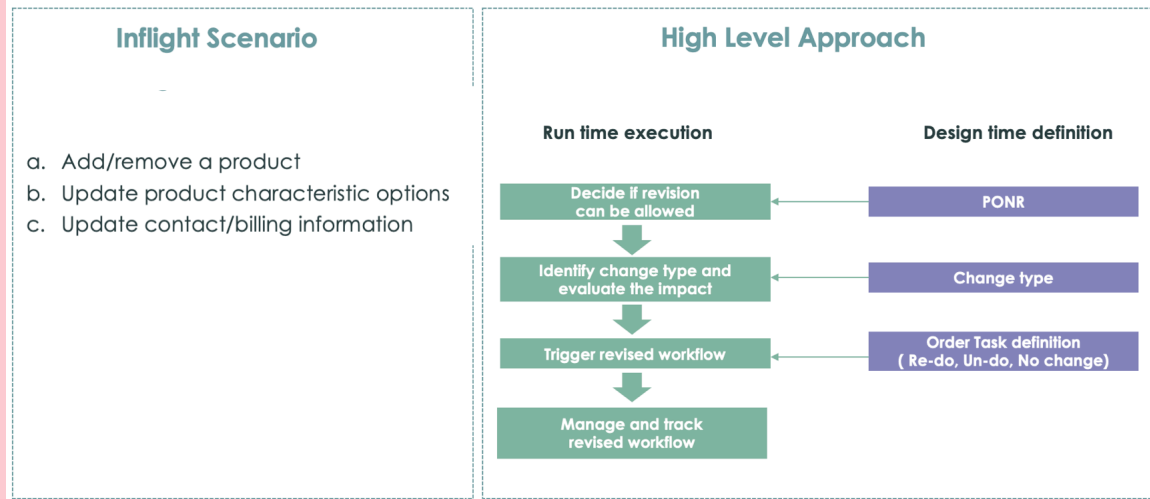
Fulfillment-driven order changes

Type of change	Example
Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact information for an order line item for a product or service in a location.	A customer supplies information about a new corporate contact person on a pending delivery of an enterprise order.
Add, change, or cancel a product, including product options, in a related domain product order.	A customer orders a modem that is incompatible with the higher-speed 500-Mbps internet service that the customer ordered. It requires replacement by another modem model.
Add, change, or cancel the service domain orders and product inventory.	A customer wants to change the characteristics value of a product or service. For example, the customers wants to change the Firewall Security Service from Standard to Basic.
Add, change, or cancel a service, including service options, in a related domain service order.	A customer wants to change the standard warranty of 90 days to an extended service policy.
Add, change, or cancel a resource, including resource options, in a related domain resource order.	Revised installation instructions are available for a product that the customer ordered.
Incorporate changes that are applicable to the related items and product inventory of a product or service order.	A customer wants to add or change an item to an order that has horizontal relationships. To learn more, see Defining a horizontal relationship .

Inflight Order Change processing

When a user or order fulfillment manager attempts to make any of these changes, the Inflight Change Order function proceeds through a structured processing sequence as shown in the following diagram.

Inflight order change high-level approach



The sequence for inflight change order processing is as follows:

1. The Inflight Change Order function determines where in the processing cycle the order is. You can only create inflight order revision and cancellation requests for orders that are in an In Progress state.
2. The ServiceNow AI Platform then determines whether the proposed revision can safely be made to the in-progress order. It evaluates the Point of No Return (PONR) status for the order and its current stage in the fulfillment process.

The PONR flag represents the no or go point at which you can't change an order:

- You can make an inflight change only for order line items with an In Progress state.
- You can't make inflight changes for an order that has already been decomposed into its domain product, service, or resource orders, and product installation has already started.

Note:

You can find the **PONR** option when you are viewing or maintaining customer or service orders in the Customer Order and Order Line Item forms. To learn more, see:

- [Select, review, revise, or request cancellation of a customer order](#) and
- [Reviewing the line items and related details for a customer order](#)

3. After an operator makes the requested changes, this functionality evaluates the type of change and its magnitude and impact on the fulfillment process as follows:
 - Simple informational changes, such as contact data, may or may not impact the fulfillment as configured in the orchestration plan.
 - If the customer requests to delete an ordered product or service, the impact of the changes, if permitted, would be greater, depending on its progress in the order fulfillment process.
4. The ServiceNow AI Platform then creates a compensation plan to trigger the tasks to fulfill the revised scope of the order as follows:

- The compensation plan creates the automated revisions that are required to the fulfillment workflow to adjust to the requested order changes.
- If the customer adds products or services to the order, the compensation plan generates additional order tasks to handle the fulfillment of the newly ordered items.
- For a product substitution, the compensation plan generates an undo task to release the old product or service and a redo task for assignment of the new product or service. After the old product has been released, it can be sold to another customer.
- For a product characteristic change, the compensation plan undoes some tasks to revert the work that is not applicable for a new characteristic value or option. The compensation plan can also include a few tasks that are required for some of the completed tasks. There could also be a few existing tasks that are unaffected by the revisions that were submitted as part of the order revision.

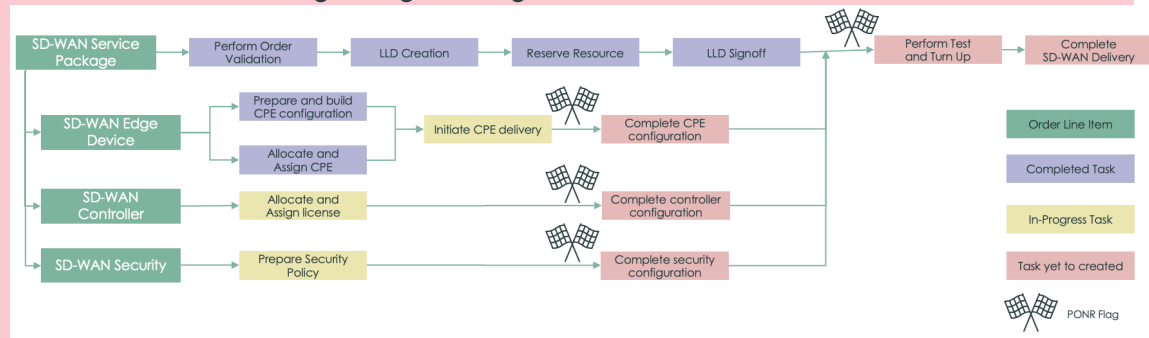
5. A manager can then track the revised workflow. By using the Inflight Order Change functions, your organization can gain the following benefits:

- Reduced manual intervention that is required to manage an inflight change order.
- Reduced time to create a revised plan for a change, which results in faster order fulfillment cycles.

Inflight order change example

The following diagram shows the process where PONR occurs for order changes that were made for an SD-WAN Service Package and its related products.

SD-WAN Service Package inflight change orders



For the top-level SD-WAN Service package, the PONR only occurs before the testing and turn up stage. A customer or internal fulfillment personnel can't change the ordered item after that point.

For subordinate products, such as the SD-WAN Edge device, the order can be changed before the Customer Premise Equipment (CPE) configuration completes. If CPE delivery is initiated but doesn't complete, and a product substitution is requested, the Inflight Change Order function can do the following actions:

- Generate an undo task for the original item.
- Generate a redo task for the replacement item.
- Create undo and redo tasks for the Prepare and build CPE configuration and Allocate and Assign CPE tasks that are completed before revision. The Inflight Change Order function can generate these undo and redo tasks because the CPE delivery task is not complete for the replacement item.

After the CPE configuration is complete, no further changes are allowed in the order for that device. This scenario also applies to the SD-WAN Controller and SD-WAN Security selections.

[End]

[store-future: BEGIN review]

Key inflight order change and cancellation request fields

Learn how the ServiceNow AI Platform uses key fields in the Customer Order and Order Line Item forms to track your order changes and cancellation requests. You can see how these fields operate and what information they show you when you revise or request a cancellation of an order, or order line items.

Overview

The **PONR** (Point of No Return) option on the Customer Order and Order Line item forms indicates the PONR state for the order or order line item. While fulfillment is in process, you can use the PONR option to determine if you can revise or request cancellation of an order or an order line item. You can only do these actions for orders and order line items that are in an In Progress state and have yet to reach the PONR stage.

Note:

The **Revise Order** and **Cancel Order** buttons are enabled only for order or order line items in this state.

Learn what happens with the **PONR** option:

- If you select the PONR option, it indicates that you can't revise or request a cancellation for the order or order line item while fulfillment is in progress. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.
- If the check box is cleared, you can still revise or request a cancellation for the order or order line item.

Note:

The **PONR** option is a system-assigned flag that you can't manually update.

By using the SET PONR action in Flow Designer, your administrator can manually configure the PONR state in the fulfillment workflow. For example, in the demo data for the SD-WAN Edge product specification workflow, the PONR action is available after the Initiate CPE delivery task.

Version

A customer or service order can go through multiple revisions during its fulfillment cycle. The **Version** field tracks the number of times that you revised or requested a cancellation of the order or order line item during the fulfillment process. A new order without any revisions has a version of 1 and automatically increments for each inflight revision.

Revision Operation

The **Revision Operation** field indicates the type of revision operation, if any, that is taking place in the current version of the order or order line item. The types of revision are as follows:

None

No update or cancellation is taking place for the order or order line item. This setting is the default for new orders and is applicable for orders without any Inflight revisions.

Update

A Contact, Characteristic, Quantity, or Price inflight revision has been submitted for the order or order line item.

Cancel

An order or order line item is canceled, or in the process of being canceled.

Change Type

When you submit an inflight order revision, the ServiceNow AI Platform automatically assigns a change type for the tracking of the order changes that are submitted by users. Characteristic, Contact, or Price types are standard in the ServiceNow AI Platform.

The change types are automatically assigned to the order or order line item when an order fulfillment or service order agent makes the following types of changes.

Assigned change types

Type of change made	Assigned change type
Changes any of the order characteristics.	Characteristic
Adds, changes, or deletes the order contact information. To learn more, see Review and update the contacts for a customer order line item .	Contact
Changes any price field.	Price
Changes made to the order line item quantity for a product or service order.	Quantity
Changes made to the order line item quantity for a product or service order due to the change in characteristic value. To learn more, see Order quantity support in Order Management .	Quantity mapping characteristics
Changes made to the related order line items and related product inventory for a product or service order.	Related items

Note:

Your administrator can also define additional change types for tracking purposes.

The related Inflight Order Line Item Changes [sn_ind_tmt_orm_inflight_order_line_item_change] table contains the following columns to track the revisions that were submitted for order line items.

Inflight Order Line Item Changes table columns

Column	Description
Order Line item	Identifier for the changed order line item.
Order Line version	Latest change version for the order line item. It tracks the number of times that you revised or requested a cancellation of the order line item during the fulfillment process.
Change Type	Type of change performed on the order line item. Characteristic Change made to any of the characteristics on an existing order line item.

Inflight Order Line Item Changes table columns (continued)

Column	Description
	Contact Changes made to the contact information on an existing order line item. Price Changes made to the pricing information on an existing order line item. Quantity Changes made to the order line item quantity for a product order. Other change types Additional change type that is defined by your administrator.
Updated by	Name of the person who updated the order line item.
Updated	Date and timestamp for the order line item change.

State when initiating and approving inflight order revisions

When you initiate, and then approve, inflight order revisions, the affected order, order line items, domain orders, and order tasks go through different states.

When initiating an inflight order revision

To initiate an inflight order change, click **Revise Order** in the Customer Order form or in the Order Line Item form. The following actions take place:

1. The customer or service order moves from an In Progress to a Revision in Progress state.
2. The associated order line items move from an In Progress state to a Revision in Progress state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an inflight order revision

To approve an inflight revision, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The updated order and order line item information triggers the decomposition process as follows:
 - The decomposition process may create additional domain product, service, and resource orders to incorporate the characteristic changes that were submitted as part of an inflight order change.
 - It may also cancel existing domain orders that are not relevant to the requested change. For example, if a customer upgrades their purchased internet service to a higher speed, it would create a domain order for a modem that supports the higher speed service. It then would cancel the existing domain order for the modem that only supported lower speeds.
2. The customer or service order moves from a Revision in Progress state to an Acknowledged state. When the order decomposition is complete, it then moves back to an In Process state.

3. The associated order line items move from a Revision in Progress state to an Acknowledged state. When the order line item decomposition is complete, they then move back to an In Process state.
4. The associated product, service, and resource domain orders change from an On Hold state to a Scheduled state. The associated subflows change the state again during fulfillment processing.

New domain orders may also be created, based on the revisions that were submitted by the customers. They remain in either the Draft or the In Progress states, depending on the configuration of the fulfillment flow for the parent domain order.
5. The ServiceNow AI Platform refreshes the fulfillment flows for all the decomposed orders. The ServiceNow AI Platform also reassesses all order tasks, depending on the sequencing of the tasks in the corresponding fulfillment workflow. The associated order tasks then move to one of the states that are listed in the following table:

Assigned order task states

State	Description
Scheduled	An order task moves to this state and remains there until processed, as per the fulfillment workflow.
In Progress	If an order task was in an In Progress state at the time you initiated the inflight order revision, it remains in this state. If the task requires a re-execution to perform a redo or undo action, it can also move from a Closed state to an In Process state.
Closed Complete	If an order task was in a Closed Complete state at the time you initiated the inflight order revision, it stays in this state. It stays in this state as long as the task isn't in an inflight configuration due to other changes that were submitted as part of an inflight order revision.

6. After the order decomposition is complete and the fulfillment flow restarts, order fulfillment agents can go ahead and work on the associated order tasks to complete fulfillment.

State when initiating and approving order cancellation requests

When you initiate and approve an order cancellation request, the affected order, order line items, domain orders, and order tasks go through different states during processing.

When initiating an order cancellation request

To initiate a cancellation request, you click **Cancel Order** in the Customer Order form, or **Cancel Order Line Item** in the Order Line Item form. The following actions take place:

1. The order moves to an Assessing Cancellation state.
2. The associated order line items move to an Assessing Cancellation state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an order cancellation request

To approve an inflight revision or cancellation request, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The decomposition process is triggered with the updated order and order line item information.
2. The order moves from an Assessing Cancellation state to a Cancellation in Progress state.
3. The associated order line items move to a Cancellation in Progress state.
4. The associated domain product, service, and resource domain orders move from their current state to an On Hold state.
5. The associated order tasks move to an On Hold state.

Related topics

[Select, review, revise, or request cancellation of a customer order](#)

[Reviewing the line items and related details for a customer order](#)

[Select, review, revise, or request cancellation of a service order](#)

[Review the line items and related details for a service order](#)

[End]

[store-future: BEGIN review]

Revise an inflight order or request a cancellation

Revise an inflight order, or order line item, or request a cancellation of a customer order or a service order when a user requests it or your internal personnel determine an order revision or cancellation is necessary.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager,
sn_ind_tmt_orm.service_order_manager

About this task

Order revision or cancellation is a two-step process. First, an operator makes the required updates or requests that an order or order line item is to be canceled. Next, when the order is created, an order fulfillment or service order manager approves the revision or cancellation request.

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. Select, revise, or request a cancellation of the customer order, customer order line item, service order, or service order line item.

[End]

[store-future: BEGIN review]

Review and approve order revisions or cancellation requests

Review a customer or service order that has a pending revision or cancellation request so that you can make sure that the order is correct and complete. You can also approve the order and order line item revisions or cancellations requests.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager,
sn_ind_tmt_orm.service_order_manage, sn_ind_tmt_orm.service_order_agent

About this task

When you approve a revised order, it enables it to continue in its modified state through the rest of the fulfillment process. When you approve a cancellation request, it finalizes the cancellation and prevents the order from continuing through fulfillment processing.

To learn more about how the states of orders change when you approve them, see [Key inflight order change and cancellation request fields](#).

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. Select the customer order or service order that you want to approve revisions or cancellation requests for.
3. In the customer order or service order, review the revision or cancellation request, and then click **Save** if you made any changes.
4. To formally approve the order revision or cancellation, click **Approve**.

Result

Orders with unapproved revisions have a Revision in Progress state. When you approve them, their state changes to In Progress. Orders with unapproved cancellation requests have an Assessing the Cancellation state. When you approve them, their order state changes to Cancellation in Progress.

[End]

Managing order fallout

Learn how Fallout Management enables you to identify, investigate, and resolve order issues so that orders can be processed to completion.

Overview

Order fallout refers to the failures that occur due to errors and exceptions that may take place during order fulfillment. These exceptions include the following:

- Incorrect data
- Connectivity problems
- Inadequate inventory supply
- Other unforeseen issues

Some issues could originate in inbound and outbound external systems that integrate with Order Management. A single order task can have multiple types of fallout issues.

The following table provides examples of fallout errors and exceptions that can occur during order processing:

Fallout errors and exceptions

Type of failure	Description
Failures in downstream fulfillment systems	Fulfillment system can't process the request due to incorrect or missing data.
Failure to complete system interaction in a timely manner	Timeouts that occur during system interactions.

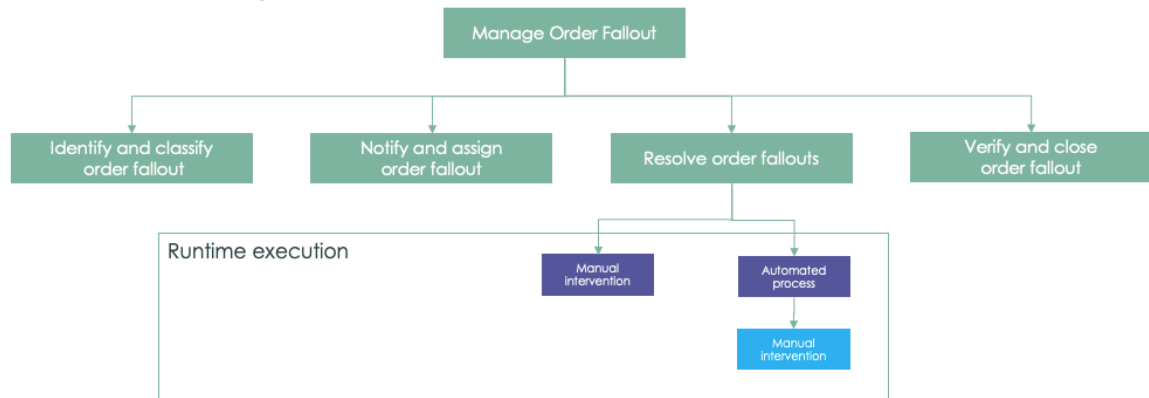
Fallout errors and exceptions (continued)

Type of failure	Description
Failure in connection	• Network connectivity issue. • Unable to locate or route a request to a target system.
Unavailable inventory	Inventory stock isn't available in the Enterprise Resource Planning (ERP system) to fulfill certain items on the order.

Fallout Management functions

With Fallout Management, you can track each order fallout and automatically trigger the actions and interventions that can resolve your order fallout in a timely manner. The following diagram shows the order fallout management flow.

Order Fallout Management flow



Fallout Management enables you to identify the orders in a failed state. Fallout tasks can be triggered and automatically routed to the appropriate team to investigate, diagnose, and resolve the underlying issue that is stopping order fulfillment. With Fallout Management, you can identify, route, assign, manage, and monitor the entire life cycle of an order fallout.

Fallout Management tools

The Fallout Management function includes the following tools:

Order fallout tracking

With this tool, you can assign a unique number to each order fallout to track the progress of the fallout, from inception through resolution. By using an Order Fallout dashboard, a designated order fallout manager can view the status of all open fallout records. To learn more, see [Review a fallout record](#).

Fallout resolution

With this tool, you can use the ServiceNow AI Platform features such as routing, notifications, and Flow Designer to process order fulfillment exceptions in an automated manner. To learn more, see [Create automated and manual fallout records](#).

For example, your customer orders a router, but insufficient inventory quantities are available in your ERP system to reserve the item and fulfill the order.

- You create a fallout record for tracking and investigative purposes. This record places the customer order line item on hold.
- An order fulfillment agent can follow up to determine what is causing the shortage. It can be due to the unavailability of the host ERP system or because of an actual stock outage for the ordered item. If it's due to a stock outage, someone can take remedial action to contact the customer, reorder the item, or find a suitable replacement.

After you resolve the issue, you can restore the customer order line item back to a normal state for completion of the order.

Without a fallout management process, your order fulfillment personnel would have to analyze and resolve these fallout issues manually. These additional tasks would result in a longer fulfillment process and could lead to poor customer and employee experiences.

Creating automated and manual fallout records

With Fallout Management, a provider can create manual or automated fallout records for specific order tasks so that your orders can continue processing through to completion.

Creating automated fallout records

To enable creation of automated fallout records, you configure an order fulfillment workflow in the Flow Designer.

- To do so, use the **Create fallout** action when defining processing scenarios and conditions.
- You can define workflows for the parent records that the order tasks originate from. Generally, order tasks originate from the customer or service orders and order line items.

To learn more, see [Flow Designer](#) .

You might encounter the following scenarios when you are attempting to fulfill customer and service orders.

Scenarios of fallout failures with downstream systems

This fallout scenario could be a situation where failures are expected to be temporary and resolved over time. Ideally, order processing should not be affected, and work should resume after the network and system resources come back online. A typical scenario is as follows:

- The order task sends a request to an external or provisioning system.
- The response from the external system comes back as `Timeout` or `Unable to reach`.

You can queue the task to be sent to the downstream system for processing, up to a predefined number of times. If the error persists after the predefined number of times, you should change the status of the order task to `Failed`, and then create an incident. You can define a workflow that automatically creates a fallout record whenever you send or retrieve order data to or from an external system that is not available.

Scenarios that involve data problems

If data problems originate with an order that you captured from an external order system, you should revise the order there. You then submit the revised order to the Order Management for Telecommunications, Media, and Technology application. If data problems originate with the tasks that are executed earlier in the process, you can do the following actions:

- Create an exception from the order task.
- Enable the revision of the existing order.
- Create an order task.

Inventory availability issues

You can define a workflow that automatically creates fallout records whenever inventory availability issues prevent the fulfillment of order line items.

External system issues

Even when the right data structure is submitted in an external system, errors can happen due to the business logic that is implemented in the external system.

Create a manual fallout record

Create a fallout record manually for an order task that has a condition or issue that prevents it from being completed.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager

About this task

You can create manual records as needed basis so that you can raise awareness of an issue or condition that is preventing order fulfillment. By creating a record manually, you can also assign it to a person for resolution.

Procedure

1. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
2. From the Configurable Workspace Lists icon (, click **Customer Orders**
 - a. Click **Customer Orders** or **Service Orders**.
 - b. Click **All** for all customer orders, or click **Open** for open, unfulfilled customer orders only.
3. Select and open an existing customer or service order.
4. To view the line item details, click **Order Line Items (n)** where (n) represents the number of the total number of line items for the order.
5. In the Order Line Items form, select the order line item that you want to review.
6. Click **Order Tasks (n)** where (n) is the number of order tasks that are associated with the selected order line item.
7. In the Order Tasks form, select the order tasks that you want to review.
8. When you finish updating the order task, or encounter issues preventing its closure, click the options icon () next to the **Save** button and then click **Create Fallout**.
9. On the form, fill in the fields.

For information about field descriptions, see the Create Fallout form fields section in [Field descriptions for Fallout Management](#).

10. Click **Save**.

Result

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On Hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On Hold. A work order note with the message A fallout record F0nnnn has been created also appears.

Related topics

[Fallout Management data model](#)

[Assigning order fulfillment and provider roles](#)

[Flow Designer](#) 

[Flows](#) 

[Create a flow](#) 

Review a fallout record

Review a fallout record to make sure that the detailed information is correct and complete.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task

You select fallout records to review in CSM Configurable Workspace. You can also review and track all fallout records for a specific order by using the **Fallouts (n)** icon where n is the number of fallouts. This icon appears when you view the related fallout record.

Procedure

1. Navigate to **All > Fallout Management > Workspace > Configurable Workspace Home**.

Note:

If you are not currently using configurable workspaces, navigate by using the following path:

Workspace Experience > Workspaces > Agent Workspace Home.

To learn more about migrating to configurable workspaces, see [Migrate to Configurable Workspace](#) 

If you have an assigned Fallout Manager or Fallout Agent role, the Fallout Management workspace appears. If the Fallout Management workspace does not appear, do the following actions:

a. From the **Configurable Workspace Lists** icon () , click **Fallouts**.

b. Do one of the following actions:

- To view all fallout records, click **All**.
- To view only those fallout records that are assigned to you, click **My Fallouts**.

Note:

To learn more about creating or updating fallout details, see [Update a fallout record](#).

c. Select the fallout record that you want to review:

- To refresh the form, click the refresh () icon.
- To filter existing service orders, click the filter () icon.

2. In the Fallout Management workspace, select the fallout record to review by selecting the appropriate tile.

For information about field descriptions, see the Fallout workspace fields section in [Fallout Management forms](#).

Update a fallout record

Review the detailed information for a selected fallout record to verify that the information is correct and complete. You can change the fallout type, state, or priority. You can even assign it to a specific person to follow up on.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task

If you have a fallout agent role, you can change the state of the fallout records, create work notes in them, or assign them to other users.

Procedure

1. On the form, review the fallout record that you selected.
For information about the field descriptions, see the Fallout form fields section in [Fallout Management forms](#).
2. In the Details pane, review the details of the fallout record:
 - To show the Details pane in the full screen, click the show form in full screen icon (.
 - To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon ( (default).
 - To show the Activity pane in the full screen, click the show activity in full screen icon (.
3. Select **Save**.

Reviewing customer or partner accounts in Order Management for Telecommunications, Media, and Technology

Learn how your order entry and fulfillment agents, managers, and fulfillers can use the 360 View in the Order Management for Telecommunications, Media, and Technology application to get a better perspective about the activity that is associated with a customer's or partner's account.

Overview

As an order agent, manager, or fulfiller, you can use your customer's or partner's account Information to gain a clear understanding of the contact, order, customer service, product inventory, and installed base item activity for an account. With this information, you can track the following types of information:

- How many service contracts have been created or renewed for the account.
- How many customer and service orders have been submitted by the customer, and what are their current states of fulfillment.
- How many active requests or customer service cases the account has, and what are their current states.
- What products and equipment the customer has ordered or has installed at their sites. By using this information, your order agents can gain insights into what additional products or services they can sell to the customer.

Note:

Most of the customer accounts in Order Management for Telecommunications, Media, and Technology are existing accounts that have been imported into the ServiceNow AI Platform from external order management systems via APIs. To learn how to create new customer accounts, see [Configure accounts and contacts](#)  in Customer Service Management (CSM).

Review an account by using the 360 View

Review a customer or partner's account by using the 360 View in the Order Management application. You can track the service contracts of your customers or partners. You can also view customer and service orders, cases, products, and equipment to see how you can improve your customer service.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab , select **Customer**, and then select **Accounts**.
3. In the Accounts list, select a customer account.

Note:

You can also access an existing customer account by selecting a customer account link in the Account column of the Orders, Customer Orders, or Service Orders lists in the Configurable Workspace Lists.

4. In the Account Information form, in the Customer Summary section, review the general customer details for the selected account.

Account Information form - Customer Summary section

Field	Description
Account	Name of the customer or partner, and the name of the primary contact for the account. To view the details for the primary contact, including the account, title, email, phone numbers, and time zone, select the contact name.
Contacts	Name of each contact for the account. ○ To access the Customer Contacts form so that you can view all contacts for the account, select View All. ○ To view the details for a contact when you are in the Customer Contacts form, select the contact name.
Contracts	Name of the contracts, if any, that are associated with this account. ○ To view the details for a contract, select the contract number. ○ To view all contracts for the account, select View All.

5. In the Overview section, in the **Customer Orders** field, review the customer and service orders for the selected account.

Account Information form - Customer Orders section

Field	Description
Customer Orders (n)	(n) represents the total number of customer and service orders for this account.
Number	System-assigned identifying number for the order. ○ To access the Customer Order form and view the order details for a customer order, select the order number. ○ To access the Service Order form and view the order details for a service order, select the order number. ○ To access the Customer Orders form to view all orders for the account, select View All. To view the detailed information for an order when you are in the Customer Orders form, select the order number.
Order Type	Type of order: Product Order for a product that you sell. Service Order for a product that you sell.
Contact	Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name.
State	State of the product or service order.

6. In the Cases section, review the customer service cases, if any, for the selected account.

Account Information form - Cases section

Field	Description
Number	System-assigned identifying number for the customer service case: ○ To view the details for a customer service case, select the case number. ○ To view all the customer service cases for the account, select View All.
Short description	Short description of the customer service case.
Contact	Name of the customer contact that is associated with the customer service case.

Field	Description
	To view the details for the contact, select the contact name.
State	State of the customer service case. To learn more, see Case states  .

7. In the Product Inventory section, review the product inventory items for the selected account.

Account Information form - Product Inventory section

Field	Description
Product Inventory (n)	(n) represents the total number of the product inventory items that were ordered for this account.
Number	System-assigned identifying number for the product inventory item: - To view the details for a product inventory item, select the product inventory number. - To view all the product inventory items for the account, select View All.
Specification	Product specification that is associated with the product inventory item. To view the details for a specification, select the specification number.
Location	Current location for the product inventory item. (<i>empty</i>) denotes that the product inventory item hasn't yet been installed at the customer site.
State	State of the product inventory item. <i>Installation Pending</i> denotes that the installation of the product inventory item is pending at the customer site.

8. In the Installed Base Items section, within the Product Inventory section, review the installed base items for the selected account.

Account Information form - Installed Base Items section

Field	Description
Installed Base Items (n)	(n) represents the total number of the base items that were installed for this account.
Number	System-assigned identifying number for the installed base item: - To view the details for an installed base item, select the installed base item number. - To view all the installed base item numbers for the account, select View All.

Field	Description
Configuration Item	System-assigned identifying number for the configuration that is associated with the installed base item. To view the details for a configuration item, select the configuration item number.
Contact	Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name.

View an order timeline

View Gantt chart timelines that display the status of a domain order and order tasks, show dependencies between order tasks, and identify tasks that are in jeopardy.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All > Workspace Experience > Workspaces > CSM Configurable Workspace**.
2. Open the order that you want to view.
3. In the **Order breakdowns** section of the order, select **View order timeline**.
The **Timeline** tab opens and displays the order tasks for the order line items and columns for the order task state and jeopardy status, if Jeopardy Management is enabled. Tasks in jeopardy are flagged with the jeopardy icon. For each task, a timeline shows the start and end dates of the task and any dependencies.
4. To change the information or elements displayed in the timeline view, use these options.

Monitoring Jeopardy Management

Order managers and agents can monitor jeopardy-enabled fulfillment tasks. When a task enters jeopardy, managers can take action to ensure the fulfillment workflow isn't delayed.

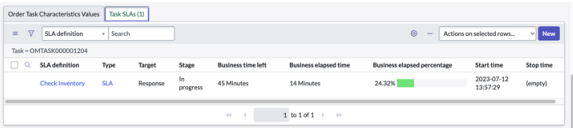
When Jeopardy Management is added to fulfillment task flows, Jeopardy Management tracks the time to complete tasks and creates a predictive assessment of the risk level to the fulfillment plan. If a task is taking longer than the defined time, jeopardy alerts are shared.

The following table describes where you can view the jeopardy status.

Jeopardy status alerts

Jeopardy status	Description
Jeopardy Level in Jeopardy-enabled order forms	Look for jeopardy status in the Jeopardy Level column of the order status form. Jeopardy levels include Low, Medium, High, and Critical.
Order Orchestration View	Navigate to Customer Order > Order > Order Line Item > Orchestration . Each Orchestration tile shows the task and Service Level Agreements (SLA) progress.

Jeopardy status alerts (continued)

Jeopardy status	Description
SLA Definition Progress Bar	Navigate to Customer Order > Order > Order Line Item > Task > SLA and view the status bar. The status bar shows the SLA progress, for example: • Green: SLA progressing on its time line. • Red: Task is near the end of the critical percentage of allotted time. 

Integrating Order Management with other applications

You can extend the capabilities of Order Management when you integrate it with other applications.

You can integrate Order Management with the following applications:

- **Integration with Field Service Management:** Create field service work order requests automatically with Order Management, and track them in Field Service Management.
- **Integration with Service Portfolio Management:** Provide project oversight of complex, long-running orders and order tasks in Order Management, and manage them in Service Portfolio Management.

Order Management integration with Field Service Management

Provides an integration between the Order Management and the Field Service Management applications. This integration is available to all ServiceNow customers with the Order Management (com.sn_ind_tmt_orm) plugin, Field Service Management Configurable Workspace (com.snc.uib.fsm_agent_workspace) plugin, and Field Service Management (com.snc.work_management) plugin.

Overview

This integration enables automatic and manual creation of work orders from the Order Management application to the Field Service Management application. This integration ensures collaboration between the Order Management and the Field Service Management applications to support the end-to-end order fulfillment process. Work orders are created for an order that requires field service work by field agents. The order fulfillment agents and managers can more efficiently manage order tasks and work order dependencies.

Key features

- Automation of work order creation, updates, and tracking.
- UI-based manual triggering of work order to Field Service Management. Schedule field service work and communicate work note updates to field service dispatchers and agents.
- Synchronization of information between Order Management and Field Service Management for status, work note, customer details, and other updates.
- Tracking and managing the end-to-end workflow of orders and associated work orders in the fulfillment process.

Configuring automatic creation of work orders

You can enable automatic creation of work orders from Order Management for Telecommunications, Media, and Technology to Field Service Management. Work orders are created for domain orders and order tasks. To configure the automatic creation of work orders, configure the decision tables in the decision builder.

Customer orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table.

After an order is approved by the manager, a work order is automatically created if the conditions that are defined in the decision builder are met. If required, the manager can also select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Configure work order creation for a domain order

Add a condition in the decision tree for automatic creation of work orders for domain order. The conditions are specified in the Work Order Policy for Domain Order decision table.

Before you begin

Role required: admin

About this task

Customer Orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For conditions not defined in the decision table, the manager can select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Procedure

1. Navigate to **All > Decision Builder**.
You can view all the decision tables.
2. Select the **Work Order Policy for Domain Order** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select an action from the Domain Order Action list.
5. Select a template for the condition in the **WO Template** column.
6. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision table is met, a work order is automatically created for a domain order. For more information on decision tables, see [Decision Builder](#) .

Configure work order creation for order task

Add a condition in the decision tree for automatic creation of work orders for order tasks. The conditions are specified in the Work Order Policy for Order Task decision table.

Before you begin

Role required: Administrator

About this task

For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table. After an order is approved by the manager, a work order is automatically created if the conditions are met that are defined in the decision builder.

Procedure

1. Navigate to **All > Decision Builder**.
You can view all the decision tables.
2. Select the **Work Order Policy for Order Task** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select **Add** for Domain Order Action.
5. Select a Request type for the order task in the **Request Type** column.
6. Select a template for the service package in the **WO Template** column.
7. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision tree is met, a work order is automatically created for an order task. For more information on decision tables, see [Decision Builder](#) .

Synchronization of information between Order Management and Field Service Management - Workflow scenario

The integration between Order Management and Field Service Management provides support for the end-to-end order fulfillment process. The following scenario shows the seamless synchronization of data, customer information, status, and other updates between Order Management and Field Service Management.

Scenario

After the order fulfillment manager approves the order in Order Management, work orders are automatically created in Field Service Management for conditions that are specified in the decision tree. As the field service agents work on those work orders, the order fulfillment agent can see the updates in the Work Notes section of that Domain Order. An agent cannot close a domain order unless all the work orders associated with it are closed. This workflow shows synchronization of information between Order Management and Field Service Management.

1. An order fulfillment agent creates a new customer order in the Order Management workspace.
2. The agent then selects the location for which the order needs to be placed. For multiple locations, multiple order line items are created.
3. The agent then reviews and places the order.
4. The order fulfillment manager approves the order. The order line items have domain orders as part of the order fulfillment flow. According to the configurations in the decision table, work orders are automatically created in Field Service Management.
5. The agent can view the work orders created for the domain orders in the **Details** tab. In the Activity section, the agent tracks all the updates for the work orders in the work notes.

- When the status of a work order changes in Field Service Management, the details are displayed in the work notes of the Order Management workspace.
 - If a work order is canceled, the work order status is displayed in the Order Management work notes section.
 - In case of inflight changes, the work order is automatically updated. The current status and the updated information are displayed in the work notes section.
6. The agent can edit an order line item if required. If the agent selects the **PONR** (Point of No Return) option, no changes can be made to the order line item in the workflow anymore.
 7. After all the work orders are closed, the order fulfillment manager can review the all the work orders and close the domain order.

Note:

The agent cannot close a domain order unless all the work orders associated with that domain order are closed.

Order Management integration with Strategic Portfolio Management

The Order Management application provides an integration with the ServiceNow® Strategic Portfolio Management (SPM) application enables project oversight of complex order fulfillment tasks. Use this integration to handle order line items and planned order tasks as projects in SPM.

Features

- Automates the creation of SPM projects based on project oversight rules, enabling project managers to track order fulfillment activities within a project in SPM.
- Synchronizes order fulfillment tasks in Order Management to an associated project in SPM, providing project managers with real-time task activity updates via state change information, notes, and comments.
- Enable fulfillment agents, managers, and project managers to view related lists that show the relationship between an order line item and project, domain order and project task, and order task and project task.
- Supports tracking and synchronization of one or more order tasks.
- Supports staggered/in-flight orders for new tasks created as part of staggered decomposition or in-flight changes. Uses predefined planned order tasks that enable synchronization between order fulfillment and project tasks.
- Closes project tasks automatically when child tasks and associated order tasks or domain orders are completed or canceled.

Benefits

- Gives project managers end-to-end project oversight of complicated orders, such as long-running orders that require delivery to a specific customer account with multiple locations.
- Manages risks by identifying issues that affect project dependencies and timely order fulfillment.
- Eliminates manual tracking of order status between SPM and Order Management applications. Reduces inefficient communication between project managers, fulfillment agents and managers, and other project stakeholders.

How the SPM integration works

The Order Management integration with Strategic Portfolio Management uses the Project Portfolio Management (PPM) standard application in SPM to track fulfillment tasks as projects in your organization. This integration also works with the Customer Project Management application if you want to track customer order fulfillment tasks as customer projects automatically.

Configuration

Admins set up the SPM integration by configuring these items:

- **Project templates:** Create the PPM project templates that are used to generate the SPM projects automatically for orders requiring project oversight. Project templates also define the planned tasks for order delivery.
- **Order Management project oversight conditions and rules:** Set the conditions and decision rules that determine the orders that qualify for project oversight and the project templates used to create those projects. You use different Project Management Oversight decision tables to specify the conditions and rules for order lines, domain orders, and order tasks and the appropriate project template to be used.
- **Field mapping in CSM table maps:** Associate Order Management fields to SPM project fields by configuring the field mapping in the CSM table maps.
- **Property for automatic closure of project tasks:** Control the automatic closure of project tasks when associated child tasks are completed by using the `sn_ind_tmt_orm.project.task.auto.closure` system property.

SPM integration flow

After an order line is created and approved, Order Management performs the following processing steps.

- **Project oversight determination:** Qualifies the order line for project oversight.
 - Checks that the order line is valid and that the PPM Standard application is installed.
 - Reviews the project oversight conditions and decision rules for order lines.
 - If the order line matches the conditions, automatically creates the project and project tasks using the specified project template.

Note:

If multiple order lines are eligible for oversight, the system creates multiple projects.

- **One-time synchronization:** Synchronizes the order line with the project, establishing the relationship between the order line and the project.
- **Project task oversight determination:** After Order Management decomposes the order line item into domain orders and order tasks, it does the following:
 - Checks the project oversight conditions for domain orders. If a domain order meets the project oversight conditions, creates the associated project and planned tasks using the project template task specified.
 - Checks the project oversight conditions for order tasks. If order tasks meet the project oversight conditions, creates the associated project and planned tasks using the project template task specified.
 - Links domain orders and order tasks back to the parent project, synchronizing attributes from the domain orders and order tasks to the project tasks.

- **Order task state changes:** As order task states change in Order Management, synchronizes the state and status with corresponding project tasks in SPM so that project managers and other project stakeholders can view the changes in real time.
- **Updates to project notes and comments:** Automatically updates project notes and project task notes when fulfillment managers or agents post work notes and comments in order line items, domain orders, and order tasks.
- **Project task closure:** Automatically closes project tasks for order tasks, including child tasks, that have been completed in Order Management.

Plugins for the SPM integration

The SPM integration is included with the Order Management application. The integration requires the following plugins, which are activated by users with the admin role:

- **PPM Standard plugin (com.snc.financial_planning_pmo):** Activates the Project Portfolio Management Standard application, which installs Financial Management and the Project Portfolio Suite. The suite includes various applications for handling projects in your organization, such as Program Management, Project Management, and Demand Management. For more information on the Project Portfolio Suite, see [Project Portfolio Suite with Financials](#).
- **Customer Project Management plugin (com.snc.csm_ppm):** Activates the Customer Project Management integration with the PPM Standard application. This integration enables customer project managers to create and manage complex projects with multiple tasks. This integration also provides end users with visibility into those projects. For details on Customer Project Management, see [Integrating with Customer Project Management](#).

Access controls in the SPM integration

The SPM integration supports certain access controls for users with the following roles.

SPM integration access controls

Role	Access controls in SPM integration	Contains roles
• Order fulfillment agent [sn_ind_tmt_orm.order-fulfillment_agent] • Service order agent [sn_ind_tmt_orm.service_order_agent]	Order fulfillment agents have read access to product orders, product order tasks, service orders, and resource orders. Service order agents have read access to service order requests, service orders, resource orders, and related fulfillment tasks. Agents have access to the following project information: • Read access to the Project form fields. • Read access to the Order Line Item to Project Relationship table.	• it_project_user • sn_customerservice.projectmanager (if using Customer Project Management)

SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles
	- Read access to the Order Line Item and Order Task related lists in PPM. - Read access to the Order task to Project Task related list in Order Management.	
- Order fulfillment manager [sn_ind_tmt_orm.order_fulfillment_manager] - Service order manager [sn_ind_tmt_orm.service_order_manager]	Order fulfillment managers receive orders, review order line items, verify that orders are ready for fulfillment, and then approves orders. Service order managers ensure that service orders are ready for fulfillment and then approve them. Managers can: - Post notes and comments on order lines and order tasks to communicate with the project manager. - View the relationship between a project and an order line item, project tasks, and order tasks. Managers have the following access to project information: - Read access to the Order Line Item to Project Relationship table. - Read access to the Order Line Item and Order Task related lists in PPM. - Read access to the Order task to Project Task related list in Order Management.	sn_ind_tmt_orm.order_creator
IT project user [it_project_user]	- Read access to the Project form fields. - Read access to the Order Line Item to Project Relationship table. - Read access to the Order Line Item and Order Task related lists in PPM.	sn_ind_tmt_orm.order_viewer

SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles
	• Read access to the Order task to Project Task related list in Order Management. • Read access to the Project Template Creation table.	
IT project administrator [it_project_admin]	• Configure access to all Project Management features. • Read and write access to the Project Template Creation table. • Read and write access to the Order Line Item related list in PPM. • Write access to the Order Task related list in PPM. • Read access to the Order Line Item to Project Relationship table. • Write access to the Order task to Project Task related list in Order Management.	• it_project_user • sn_ind_tmt_orm.order_creator
Administrator [admin]	• Creates the PPM project templates used to generate the projects for orders that require project oversight automatically. • Configures the mapping between order tasks and planned project tasks associated with project templates • Specifies the conditions and decision rules for determining project oversight and the project templates used to create those projects. • Controls automatic closure of project tasks	

Next step

As an admin, review the setup tasks in [Configuring the Strategic Portfolio Management integration](#).

Configuring the Strategic Portfolio Management integration

Configure the Strategic Portfolio Management integration so that order delivery tasks in Order Management can be tracked as planned project tasks in SPM.

As an admin, follow these tasks to set up the SPM integration.

Configuration step	Description
Activate PPM Standard (Project Portfolio Management) 🔗	Install the PPM Standard (com.snc.financial_planning_pmo) plugin. If you're tracking customer projects, you must also activate the Customer Project Management (com.snc.csm_ppm) plugin. For information on setting up Customer Project Management, see Integrate with Customer Project Management using Guided Setup 🔗. Note: If you installed the Order Management application before activating the PPM Standard or Customer Project Management plugins, you must repair the Order Management (com.sn_ind_tmt_orm) plugin to get the plugin-dependent updates and demo data for the SPM integration.
Create project templates and project template tasks	Use the Project Portfolio Management application to create the project templates for order lines and project template tasks for domain orders and order tasks.
Configure field mapping between orders and projects	Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in SPM.
Set up project oversight conditions and decision rules	Configure the conditions and decision rules for determining the order lines, domain orders, and order tasks that qualify for project management oversight. You also specify the project templates to be used to create those projects.
Control the automatic closure of project tasks	Manage the automatic closure of project tasks when related child tasks are completed or cancelled.

Creating project templates and project template tasks

You create the project templates and project template tasks that Order Management uses to instantiate projects for order lines and associated domain orders and order tasks.

In the SPM integration, project templates define the structure of a project for order lines and the project planned tasks that map to the order fulfillment tasks for the order line. You specify project templates and project template tasks in the project oversight decision rules. Order Management uses these rules to determine which order items require oversight and the project template or project template tasks used to create the projects.

As an admin or user with the it_project_manager role, you create project templates and the project template tasks in Project Portfolio Management. For more information, see [Project](#)

[templates](#) and [Create a project template](#). The demo data with the Order Management application includes project templates that you can copy and change as needed.

Note:

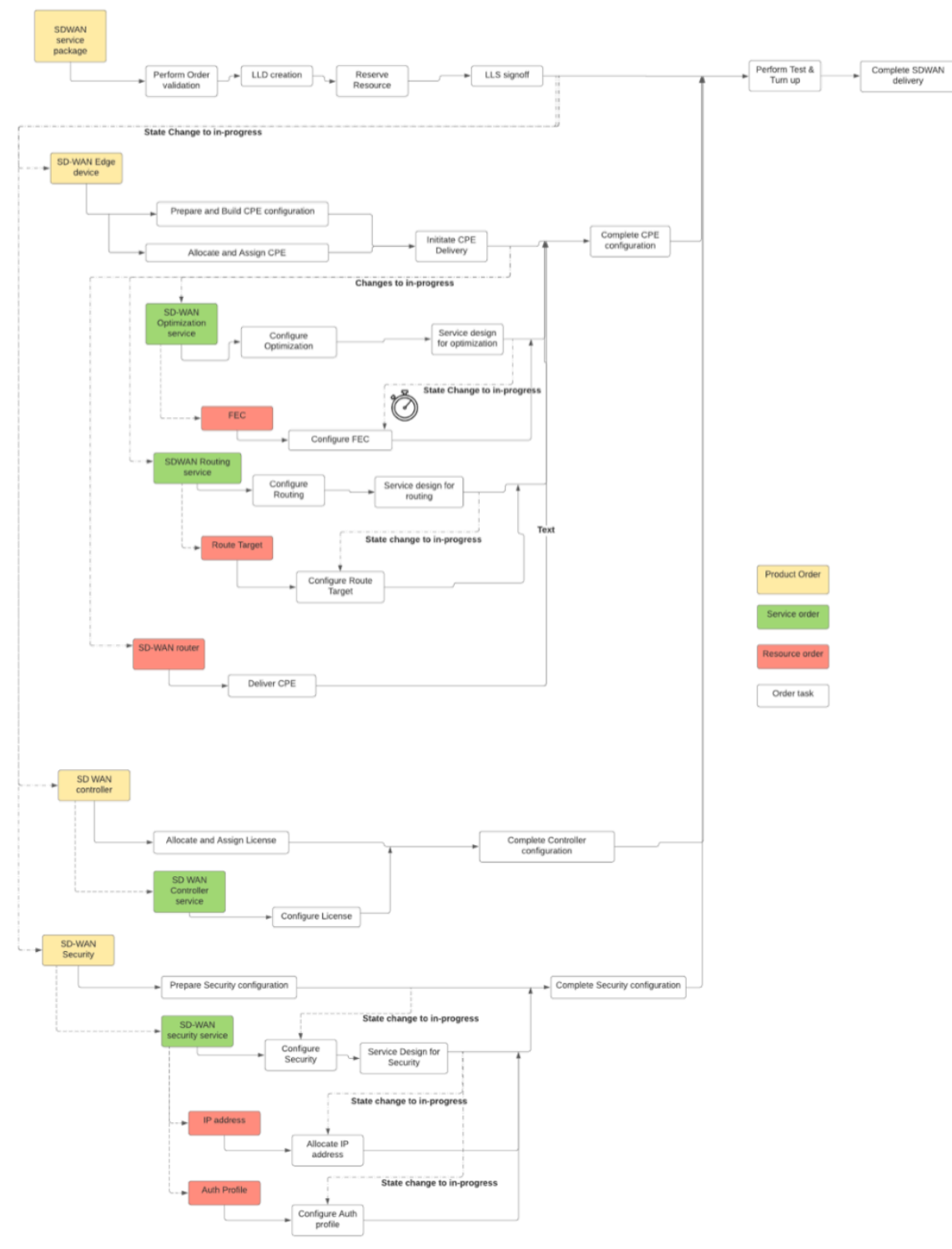
When you create project template tasks for domain orders and order tasks, be sure to anticipate inflight changes that may require additional planned tasks. Define those potential planned tasks in the template tasks so that the system can synchronize the planned tasks with the additional order tasks resulting from inflight changes in Order Management.

The demo data for the Order Management application includes project templates that you can copy and change as needed.

Before creating project templates and project template tasks

Before you create your project template and project task templates for the SPM integration, consider the level of project oversight required for customer orders to be fulfilled. For example, in the following SD-WAN fulfillment flow, the top order line is SD-WAN Service Package, which defines the order line project to be created. Next, identify the domain orders and then the order tasks that require project task oversight.

SD-WAN fulfillment flow



Setting up project oversight conditions and decision rules

As an admin, you create and maintain the conditions and decision rules that determine whether an order item qualifies as a project that can be tracked in Strategic Portfolio Management. You also specify the project template that Order Management uses to create that project for the order item.

Set the conditions and decision rules for project oversight of order lines and associated domain orders and order tasks by using Decision Builder forms for order lines, domain orders, and order

tasks. These forms have a decision table for specifying the conditions and rules to be applied when Order Management determines eligibility for project oversight.

For example, in the Project Oversight Management for Order Line Item form, you use the decision table to add or change condition columns. You also specify the decision rules, including the project template, to be applied.

Project Management Oversight for Order Line Item

The screenshot displays the 'Project Management Oversight for Order Line Item' decision table in the ServiceNow Decision Builder. The interface includes a header with the title and a 'Created' timestamp. Below the header, there are sections for 'Inputs' and 'Decision table'. The 'Inputs' section shows a table with columns for Label, Type, Reference, and Mandatory. The 'Decision table' section shows a table with columns for Conditions and Results. The 'Conditions' column is further divided into Action, Specification, Account, Location, Offering, and Project Template. The 'Results' column is divided into Project Template. The table contains three rows of data, each representing a decision rule. The first row has Action 'Add', Specification 'SD-WAN Service Package', Account 'Purco Int', Location '3000 Main Street, Santa Clara, CA', Offering 'Premium SD-WAN Offering', and Project Template 'SD-WAN Package'. The second row has Action 'Suspend', Specification 'SD-WAN Service Package', Account 'Purco Int', Location '324 South State Street, Salt Lake City, UT', Offering 'Premium SD-WAN Offering', and Project Template 'Demo Template'. The third row has Action 'Add', Specification 'SD-WAN Service Package', Account 'Purco Int', Location '324 South State Street, Salt Lake City, UT', Offering 'Premium SD-WAN Offering', and Project Template 'SD-WAN Package'.

For more information on adding or changing conditions in decision tables, see [Decision Builder](#).

Note:

If Order Management demo data is installed, the decision table for each project oversight form displays the condition columns and the decision rows added for demo data. You can add, change, or delete the condition columns and decision rows as needed.

Configure project oversight for order lines

Specify the conditions and decision rules that qualify an order line for project oversight. You also specify the project template used by Order Management to create the project for the order line.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Line Item Decision Builder to add or change the conditions and decision rules that must be met for an order line to be tracked as a project. For example, if you want projects to be created for order lines that have a particular product, customer account, and location, you can add condition columns for **Specification**, **Account**, and **Location**.

Procedure

1. Navigate to **All > Decision Management > Decision Builder**.
2. Select the **Project Management Oversight for Order Line Item** decision table.
The Order Line Item is displayed in the **Inputs** and the **Project Template** column in the **Results**.
3. Add a condition that an order line must match.
 - a. Select **Add Condition column**.
 - b. On the form, fill in the fields.

New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For order line items, the table is Order Line Item [sn_ind_tmt_orm_order_line_item].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select Field and choose a field from the Order Line Item table, such as Account , to specify a customer account.
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row.**

a. Select the **Add** action and enter the conditions that the order line must match and the project template for creating the project.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template to create projects for order lines that match the conditions and decision rules defined in the Project Oversight for Order Line Items decision table.

Configure project oversight for domain orders

Specify the conditions and decision rules that qualify domain orders for project oversight. You also specify the project template task used by Order Management to create the project for domain orders.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Domain Order Decision Builder to add or change the conditions and decision rules that a domain order must meet to be tracked as a project. For example, if you want projects to be created for domain orders for a particular product, you can add a condition column for **Specification**.

Procedure

1. Navigate to **All > Decision Management > Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
The Domain Order item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.
 - a. Select **Add Condition column**.
 - b. On the form, fill in the fields.

New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Domain Order [sn_ind_tmt_orm_domain_order].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select Field and choose a field from the Domain Order table, such as Specification (Domain Order.specification) to specify a product.
Condition type	Data type selected for the condition column.

Field	Description
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions and project template task to be used.

Note:

If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template tasks. For details on differentiating between similar project template tasks, see [Choosing a project template task when duplicates exist](#).

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template task to create projects for domain orders that match the conditions and decision rules defined in the Project Oversight for Domain Order decision table.

Configure project oversight for order tasks

Specify the conditions and decision rules that qualify order tasks for project oversight. You also specify the project template task used by Order Management to create the project for order tasks. The project template task defines the project tasks for the order tasks.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Task Decision Builder to add or change the conditions and decision rules that an order task must meet to be tracked as a project. For example, if you want projects to be created for order tasks for a particular request type, you can add a condition column for **Type**.

Procedure

1. Navigate to **All > Decision Management > Decision Builder**.

2. Select the **Project Management Oversight for Domain Order** decision table.

The Order Task item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.

3. Add a condition that a domain order must match.

a. Select **Add Condition column**.

b. On the form, fill in the fields.

New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Order Task [sn_ind_tmt_orm_order_task].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select Field and choose a field from the Order Task table, such as Request Type (Order Task.request_type) to specify a request type.
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions and project template task to be used.

Note:

If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template task. For details on differentiating between similar project template tasks, see [Choosing a project template task when duplicates exist](#).

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template task to create projects for order tasks that match the conditions and decisions rules defined in the Project Oversight for Order Task decision table.

Choosing a project template task when duplicates exist

As an admin, when you're configuring the decision rules for domain orders and order tasks, you may find that there are multiple project template tasks with the same **Short description**. It may be difficult to determine the correct project template task to select.

For example, the following decision table for Project Oversight for Domain Order shows two options with the same name for the project template task: Product Order for SD-WAN Security. This project template task has the same **Short description** for two different project template tasks, one for SD-WAN Package and the other for SD-WAN Customer Product Bundle.

Duplicate project template tasks in Project Management Oversight for Domain Order

The screenshot shows the ServiceNow Decision Builder interface for 'Project Management Oversight for Domain Order'. The interface includes a header with the title and a 'Created' timestamp. Below the header, there are sections for 'Inputs' and 'Decision table'. The 'Inputs' section shows a table with columns for Label, Type, Reference, and Mandatory. The 'Decision table' section shows a table with columns for Conditions, Action, Specification, and Results. The Results column shows a dropdown menu with multiple 'Product Order for SD-WAN Security' entries, indicating duplicates.

You can determine the appropriate project template task by finding and verifying the `sys_id` of the project template task to be used. For more information, see [Verify the sys_id of a project task template](#).

Verify the sys_id of a project task template

Determine if you're using the correct project task template for domain orders or order tasks by checking the `sys_id` of the project template task.

Before you begin

Role required: admin

Procedure

1. Navigate to **All**, and in the filter enter `project_template_task.list`.
2. Select the record for the project template task to be verified, and [Get the sys_id from the header bar](#)

The screenshot shows the 'Project Template Task - Product Order for SD-WAN Security' form. The form includes fields for Name, Table, Link element, Project Template, Parent Template, and Active status. Below these fields is a 'Data' section with a form for 'Template' containing fields for 'Allow dates outside schedule', 'Key milestone', 'Milestone', 'Short description', and a dropdown for 'choose field'. There are also 'Update' and 'Delete' buttons. At the bottom, there is a table for 'Project Template Tasks' with columns for 'Number' and 'Table', and a search bar.

For example, in the Project Template Task record for Product Order for SD-WAN Security, which belongs to the SD-WAN Package project template, the sys_id is 183910354fcd2110c5ff2624b2ce0b49.

3. Check the value of the sys_id in the associated Decisions table entry.
 - a. Navigate to **All** and in the filter, enter `sys_decision_question.list`.
 - b. In the Decisions [sys_decision_question] table, locate the record of the corresponding decision table entry, for example Project Management Oversight for Domain Order.
 - c. In the record for the project template task, select the **Answer** column.

Active	Answer	Condition	Decision table	Default answer	Input table	Label	Marked for deletion	Order	Domain
Search	Search	Search	*Domain	Search	Search	Search	Search	Search	Search
true	Decision Table Multiple Result: Project Template Task: Product Order for SD-WAN Service Package	u_domain_order.specification=ch5ef6a537...	Project Management Oversight for Domain ...	false	var_m_sys_decision_input_9b467925bed1...	Project Management Oversight for Domain ...	false	100	global
true	Decision Table Multiple Result: Project Template Task: Product Order for SD-WAN Controller	u_domain_order.action=add*u_domain_order...	Project Management Oversight for Domain ...	false	var_m_sys_decision_input_9b467925bed1...	Project Management Oversight for Domain ...	false	200	global
true	Decision Table Multiple Result: Project Template Task: Product Order for SD-WAN Security	u_domain_order.action=add*u_domain_order...	Project Management Oversight for Domain ...	false	var_m_sys_decision_input_9b467925bed1...	Project Management Oversight for Domain ...	false	300	global
true	Decision Table Multiple Result: Project Template Task: Product Order for SD-WAN Edge Device	u_domain_order.action=add*u_domain_order...	Project Management Oversight for Domain ...	false	var_m_sys_decision_input_9b467925bed1...	Project Management Oversight for Domain ...	false	400	global

Related Links
Expand Domain Scope

The resulting record for the **Answer** field opens.

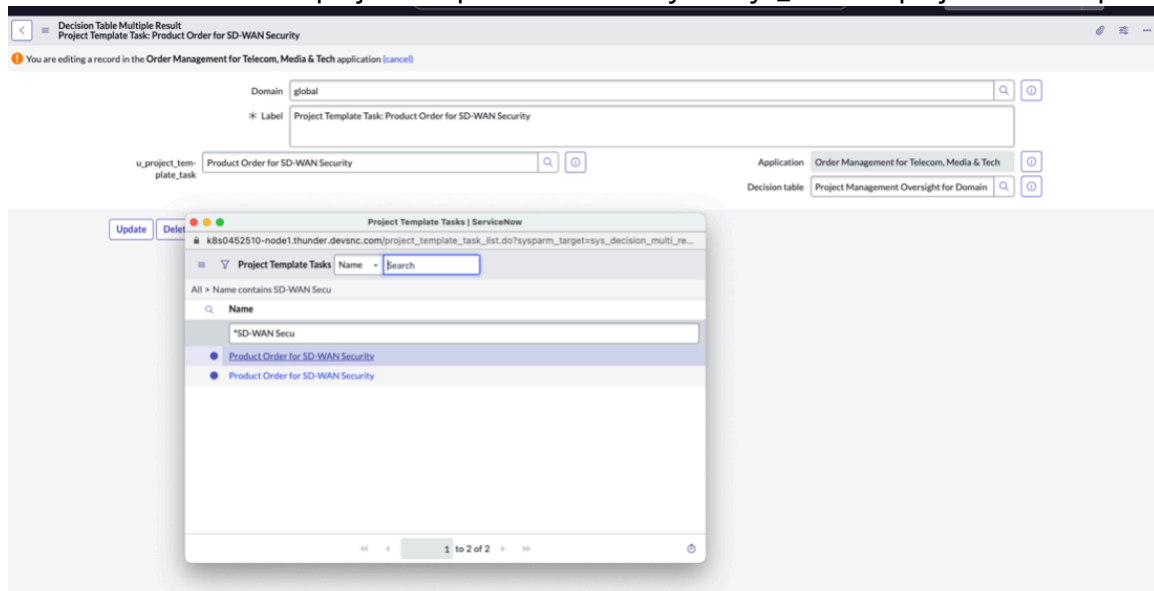
4. In the resulting record for the Decision Table Multiple Result, view the XML output by right-clicking the header bar of the record and selecting **Show XML**.
5. Review the XML and locate the sys_id value in the file.

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml>
<sys_decision_multi_result>
  <decision_table display_value="Project Management Oversight for Domain
  Order">9fb467925bed110235d85cced81c723</decision_table>
  <label>Project Template Task: Product Order for SD-WAN Security</label>
  <result_elements/>
  <sys_class_name>sys_decision_multi_result</sys_class_name>
  <sys_created_by>admin</sys_created_by>
  <sys_created_on>2023-03-15 18:29:26</sys_created_on>
  <sys_domain>global</sys_domain>
  <sys_domain_path>/</sys_domain_path>
  <sys_id>514aeb965bed110235d85cced81c7ca</sys_id>
  <sys_mod_count>0</sys_mod_count>
  <sys_name>Project Template Task: Product Order for SD-WAN Security</sys_name>
  <sys_package display_value="Order Management for Telecom, Media & Tech"
  source="sn_ind_tmt_orm">3c58f5d55b0310102dff5e92dc81c711</sys_package>
  <sys_policy/>
  <sys_scope display_value="Order Management for Telecom, Media & Tech">3c58f5d55b0310102dff5e92dc81c711</sys_scope>
  <sys_update_name>sys_decision_multi_result_514aeb965bed110235d85cced81c7ca</sys_update_name>
  <sys_updated_by>admin</sys_updated_by>
  <sys_updated_on>2023-03-15 18:29:26</sys_updated_on>
</sys_decision_multi_result>
<sys_variable_value action="delete_multiple" query="document_key=514aeb965bed110235d85cced81c7ca"/>
<sys_variable_value action="INSERT_OR_UPDATE">
  <document>sys_decision_multi_result</document>
  <document_key>514aeb965bed110235d85cced81c7ca</document_key>
  <order>100</order>
  <sys_class_name>sys_variable_value</sys_class_name>
  <sys_created_by>admin</sys_created_by>
  <sys_created_on>2023-03-15 18:29:26</sys_created_on>
  <sys_id>554aeb965bed110235d85cced81c7ca</sys_id>
  <sys_mod_count>0</sys_mod_count>
  <sys_updated_by>admin</sys_updated_by>
  <sys_updated_on>2023-03-15 18:29:26</sys_updated_on>
  <value>183910354fed2110c5ff2624b2ce0b49</value>
  <variable display_value="Project Template Task">8d4aeb965bed110235d85cced81c7a3</variable>
</sys_variable_value>
</xml>
```

The sys_id value should match the sys_id of the project template task determined in Step 1. If the sys_id doesn't match, proceed to the next step.

- In the Decision Table Multiple Result record, select the **u_project_template_task** and check the XML view of another project template task to verify the sys_id of the project task template.



Configure field mappings

Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in Service Portfolio Management.

Before you begin

Role required: admin

About this task

Order Management provides Customer Service Management table maps for associating order line items, domain orders, and order tasks to projects and project tasks in SPM. The tables that

you configure depend on whether you're using the PPM Standard application to track projects in your organization or the Customer Project Management integration to track customer projects.

- If you're using PPM, configure the field mapping for these CSM table maps:

Table maps for PPM

Table map	Source table	Target table
Order Line Item to Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Project [pm_project]
Domain Order to Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Project Task [pm_project_task]
Order Task to Project Task	Order Task [sn_ind_tmt_orm_order_task]	Project Task [pm_project_task]

- If you're using Customer Project Management, configure the field mapping for these CSM table maps:

Table maps for Customer Project Management

Table map	Source table	Target table
Order Line Item to Customer Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Customer Project [customer_project]
Domain Order to Customer Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Customer Project Task [customer_project_task]
Order Task to Customer Project Task	Order Task [sn_ind_tmt_orm_order_task]	Customer Project Task [customer_project_task]

The source and target tables in each table map are pre-populated.

Note:

If you installed demo data for Order Management, the field mapping for the **Source Field** and **Target Field** display the values used for demo data. You can use the existing field mapping or change it as needed.

Procedure

1. Navigate to **All** and in the filter enter `csm_table_map.list`.
2. Do one of the following:
 - If you're using PPM, select the Order Line Item to Project table map.
 - If you're using Customer Project Management, select the Order Line Item to Customer Project table map.
3. Go to the **Basic Field Mapping** related list and define a field mapping.

Note:

If Order Management demo data is installed, the **Source Field** and **Target Field** values in the Basic Field Mapping related list display the mapping for demo data. You can use the mapping or change it as needed.

4. Do one of the following:

- If you're using PPM, select the Domain Order to Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.
- If you're using Customer Project Management, select the Domain Order to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

For example, you can select the **Short Description** field in the Domain Order source table and map it to the **Short Description** field in the Project Task target table.

5. Do one of the following:

- If you're using PPM, select the Order Task to Project table map if and repeat Step 3 to define a new field mapping or update an existing mapping.
- If you're using Customer Project Management, select the Order Task to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

For example, you can select the **Short Description** field in the Order Task source table and map it to the **Short Description** field in the Project Task target table.

Result

The fields in the Order Management source tables are mapped to the fields in the SPM target table.

Control automatic closure of project tasks

Manage the automatic closure of projects in the SPM integration by using the *sn_ind_tmt_orm.project.task.auto.closure* system property.

Before you begin

Role required: admin

About this task

In the SPM integration, Order Management closes project tasks automatically when all associated order tasks are completed and there are no open child tasks that have project task dependencies. If a project task has open child tasks, Order Management doesn't automatically close the project task. You can use the *sn_ind_tmt_orm.project.task.auto.closure* property to suppress or reactivate the automatic closure of project tasks.

Procedure

1. Navigate to **All** and in the filter, enter `sys_properties.list` and press **Enter**.
2. Search for and open the *sn_ind_tmt_orm.project.task.auto.closure* property.
3. In the **Value** field, set the value for the property.
 - To suppress automatic project task closure, enter `false`.
 - To reactivate automatic project task closure, enter `true`.
4. Select **Update**.
Automatic project task closure in the SPM integration is immediately suppressed or reactivated based on the value that you entered. If automatic closure is suppressed, any order task-to-project task updates occur only when order tasks are in an in-progress state.

Tracking order tasks and associated projects

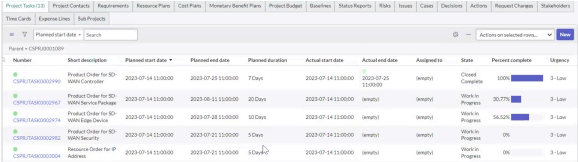
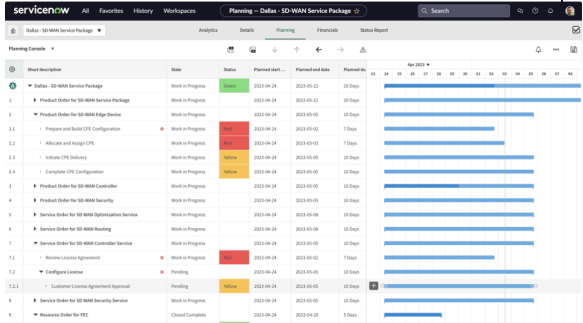
With the SPM integration, project managers and fulfillment agents or managers can track projects in Strategic Portfolio Management that have associated order tasks in Order Management.

Tracking projects for planned order tasks in SPM

As a project manager, you can review and update projects that have been created for tracking planned order tasks using the Project Portfolio Management application in SPM. When fulfillment managers and agents update or complete order tasks, Order Management automatically synchronizes project states between SPM and order line items, task and domain order states, and project task and order task states as fulfillment managers and agents complete order tasks.

A project manager has the `it_project_manager` role for tracking and updating projects.

Project manager tasks

Task	Details
Review an order fulfillment project and state	1. Navigate to All > Projects > Project Workspace. 2. Select the project for the order item. Note: The Project Name is the name assigned when Order Management created the project using the specified project template. 3. Select the Details tab then scroll down to the Project Tasks tab to review project tasks, State, and Percent complete, 
Review the project state and project task state to assess the project status	1. Navigate to All > Projects > Project Workspace. 2. Select the project for the order item. 3. Select the Planning tab. The Gantt chart view  displays.

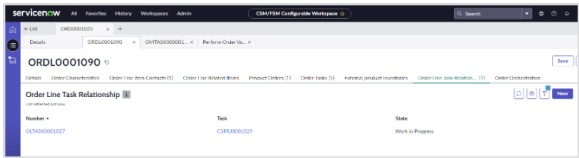
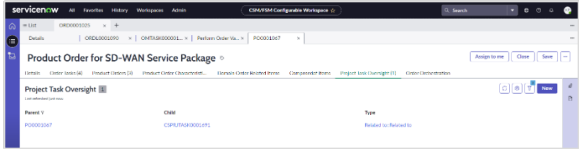
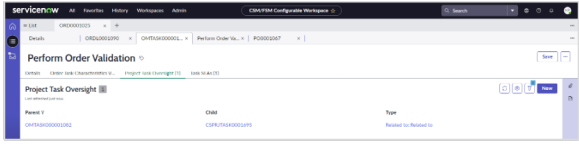
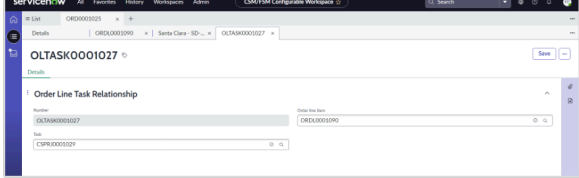
Project manager tasks (continued)

Task	Details
Review notes and comments on order tasks from fulfillment agents and managers	1. Navigate to All > Projects > Project Workspace. 2. Select the project for the order item. 3. Go to the Notes tab and view the comments and status updates from Order Management.

Tracking fulfillment tasks that have associated projects in Order Management

As a fulfillment agent or manager, you can view the relationship between a project and order line item, project tasks, and order task in the Configurable Workspace. You can also post notes and additional comments on order lines and order tasks to communicate with the project manager responsible for project oversight of the order management tasks.

Fulfillment agent or manager tasks

Task	Example
View order line-to-project relationship in order line item form	
View project task-to-domain order relationship in domain form	
View order task-to-project task relationship in order task from	
View Details tab in order task relationship to see task number, project number, and order line item number relationship	

[store-future: BEGIN review]

Sales and Order Management reference

Reference topics provide additional information about the Sales and Order Management applications.

[End]

[store-future: BEGIN review]

Order Management reference

Reference topics provide additional information about Order Management.

[End]

[store-future: BEGIN review]

Account Details form in Order Management

The Accounts Details form enables you to create or review account details for a customer or for a partner.

Field	Description
Name	Name of the enterprise or customer.
Account	System-assigned account number, in the format ACTnnnnnnnn.
Primary Contact	Name of the primary contact person for the account. Select the search icon (🔍) to search for related records.
Parent Account	Name of the parent account, if any, for this account. - For example, if you are setting up an account that is a national branch of a multi-national corporation, the parent account is the one for the multi-national corporation. Select the search icon (🔍) to search for a parent account. - If there isn't a parent account, leave this field empty.
Registration Code	Registration code, if any, assigned to the account.
Customer	Option that designates if this account is for a customer.
Partner	Option that designates if this account is for a business partner.
Website	URL of the website for this account, if any.
Phone	Primary phone number for the account.
Street	Street address for the account.
City	Name of the city for the account.
State / Province	Name of the US state or Canadian province for the account.
Zip / Postal code	Zip or postal code for the account.
Country	Name of the city for the account.
Notes	Free form note text for the customer account.

[End]

Customer Order Management workspace and Customer Order forms

The Customer Order Management workspace and Customer Order forms enable you to select, review, and modify captured customer orders.

[store-future: BEGIN review]

Customer Order Management workspace fields

The Customer Order Management workspace form enables you to select customer orders for review and modification.

Customer Order Management workspace fields

The **Details** tab on the form provides case-related information.

Tile	Description
New Customer Orders	Number of new customer orders that require review. 1. If you click this tile, the New Order list appears. 2. Select the new order that you want to review. To learn more, see Select, review, revise, or request cancellation of a customer order.
Open Tasks	Number of open customer order tasks that require review and action. 1. If you click this tile, the Open Tasks list appears. 2. Select the open order task that you want to review. To learn more, see Review and update the customer order fulfillment tasks.
Unassigned Tasks	Number of unassigned customer order tasks that require assignment and action. 1. Click this tile to see the Unassigned Tasks list. 2. Select the unassigned order task that you want to review. To learn more, see Review and update the customer order fulfillment tasks.
Open Fallouts	Number of open fallout records. 1. Click this tile to see the Open Fallouts list. 2. Select the fallout record that you want to review. To learn more, see Update a fallout record.

Tile	Description
Open Customer Orders	Pie chart that indicates the number and percentage of customer orders that are in process or in the process of cancellation. 1. Click this tile to see the Current Customer Order list. 2. Select the customer order that you want to review.
Customer Order Fulfillment trends	Number of customer orders that were fulfilled during the last four months.
My Active Tasks	Listing of the active customer order tasks assigned to the logged-in user. The following information appears: Number Unique system-assigned task number that starts with a prefix of TASK. Priority Relative priority or importance of the active task. 1-Critical Task with urgent time criticality that requires immediate attention. 2-High Task with high time criticality, though not as urgent as a Critical priority order task. 3-Moderate Task with medium time criticality and urgency. 4-Low Task with low time criticality and urgency. Short description Short description of the task. State Current state for the task. Open Processing for the task is open, and no

Title	Description
	processing is taking place. In Progress Processing for the task is still in progress or in fulfillment. Closed Complete Processing for the task is complete. It is a system-assigned state. Canceled Processing for the order task was canceled.

[End]

[store-future: BEGIN review]

Customer Order form fields

The Order Line Items form line item details section enables you to review and modify the general details for a customer order line item.

Field	Description
ORDnnnnnnnn	Unique system-assigned customer or service order number.
Account	Name of the customer account. Click the account name to review the account details: • Account name • Account number • Primary Contact • Parent Account (if any) • Registration Code • Customer or Partner check boxes, indicating if the account is a customer or business partner • Web site • Phone • Address
Contact	Name of the account contact person. Click the name to review the following contact details:

Field	Description
	• First and last name • Account name • Contact title • Language • Email address • Business and mobile phone number • Time zone • Notification indicator. You can use this information to enable or disable order notifications to the customer.

[End]

[store-future: BEGIN review]

Customer Order Details pane - order details fields

The Customer Orders Details pane - order details section enables you to review and modify the general details for a customer order.

Field	Description
Order	Unique system-assigned customer order number. Note: Both customer orders and service orders have an assigned ID with a prefix of ORD. To learn more about service orders, see • Creating, reviewing, approving, and fulfilling service orders • Select, review, revise, or request cancellation of a service order
Account	Name of the customer account. Note: To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon (ⓘ) to view the associated details for the field. • Click the search icon (🔍) to search for related records. • Click the calendar icon (📅) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the contact for the order.

Field	Description
Order Date	Date that you received the customer order.
PONR	Option that indicates if this order is past the Point of No Return. • If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress. ◦ You can't click Revise Order or Cancel Order to attempt to change the order line item or to request a cancellation for it. ◦ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order. • If cleared, you can still revise the order or request a cancellation for it. The value for this option is a system-assigned flag that you can't manually update.
Order Category	Category that indicates the type of order. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. Note: Like a captured service order, customer orders have an ID with a prefix of ORD(nnn). The Order Category field enables you to easily identify the type of order.
State	Indicator of the current processing state for the customer order, including all of its associated line items. To view a listing of the state selections, click the down arrow icon (▼). Note: To view a comprehensive listing of customer order states with detailed descriptions, see Customer order states.
Fulfillment Type	Type of fulfillment action for the customer order. Deliver Deliver ordered items to the customer when you fulfill the order. Qualify

Field	Description
	Check the feasibility of delivering the products and services requested on the customer order. Without actually activating or delivering the products or services for the order, it usually processes with a different set of tasks. If all preceding tasks are complete, processing for the associated product, service, or resource order tasks can start.
Version	Current version of the customer order. Indicates the number of times that you revised the customer order during the fulfillment process. A customer order for a product or service can go through multiple revisions during its fulfillment cycle. A new order without any revisions has a version of one, and automatically increments for each inflight revision.
Revision Operation	Type of revision operation, if any, that is taking place in the current version of the customer order: None No update or cancellation is taking place for the customer order. This setting is the default for new customer orders. Update A Characteristic, Contact, or Price inflight revision has been submitted for the customer order. Cancel A customer order is canceled or in the process of being canceled.

[End]

[store-future: BEGIN review]

Customer Order Details pane - pricing details fields

The Customer Orders Details pane - pricing details section enables you to review and modify the pricing details for a customer order.

Field	Description
Monthly Recurring Charges	Total nonrecurring charges for the entire customer order. An example is a one time installation fee.
Non Recurring Charges	Total nonrecurring charges for the entire customer order. An example is a one time installation fee.

Field	Description
Contract	ID for the service contract, if any, that is associated with the customer order.
Total Price	Total price for the entire customer order.

[End]

[store-future: BEGIN review]

Customer Order Details pane - other details fields

The Customer Orders Details pane - order details section enables you to review and modify the additional details for a customer order.

Field	Description
Other details	Actual and expected start date details for the customer order.
Actual Start Date	Field that you can use for any date-related purpose. For example, you can use it to enter the actual date that you delivered the ordered item or service. Note: The Actual End Date , Expected Start Date , and Expected End Date fields are informational only and are not used for any type of processing in your instance.
Actual End Date	Field that you can use for any date-related purpose. For example, you can use it to enter the actual date that you delivered the ordered item or service.
Expected Start Date	Field that you can use for any date-related purpose. For example, you can use it to designate the date after which the customer expects the delivery of the ordered item or service.
Expected End Date	Field that you can use for any date-related purpose. For example, you can use it to designate the date before which the customer expects the delivery of the ordered item or service.
Notes	Additional comments block.
Other comments	Extra free-form internal comment text for the customer order.
Compose	Universal comment text block.

Field	Description
Comments	Free-form comment text for the customer order that everyone, including the customer, can see.
Activity	Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions: - Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: 
Attachments	File attachments for the customer order. Click Browse to add the file as an attachment.

[End]

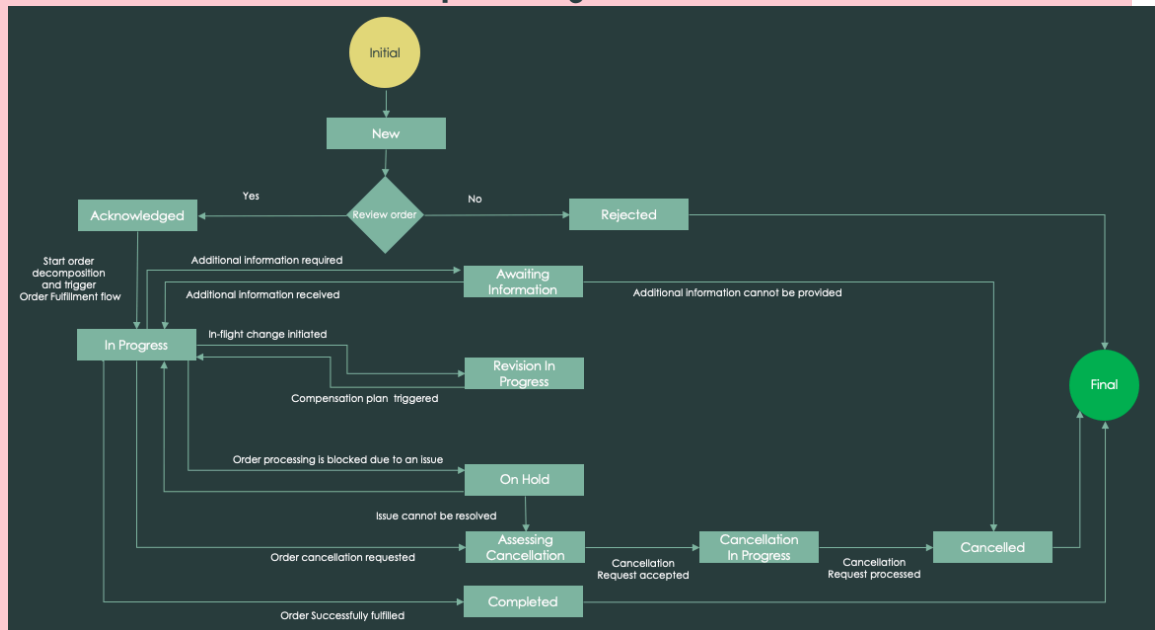
[store-future: BEGIN review]

Customer order states

Use the **State** fields on the customer order management forms to determine the current processing state for the customer order and to perform certain types of customer order actions, such as canceling a customer order.

The following diagram shows how customer and service order state processing works.

Customer and service order state processing



Customer Order form states

Use the **State** field on the Customer Order form to determine the current processing state for the customer order, including all of its associated line items. You can also use it to perform certain types of order actions, such as canceling a customer order. To learn more, see [Select, review, revise, or request cancellation of a customer order](#).

Customer order state	Description
Draft	Customer order that is still in the capture stage or the manual entry of the customer order is not complete. The data capture phase is when your instance is capturing the full customer order details from an API or through Service Bridge. Draft is a system-assigned state.
New	Customer order capture process is complete and the entire order is awaiting approval by the fulfillment manager. After the customer order data capture completes, it automatically moves to the New state.
Submitted	Customer order that the order agent has submitted.
Enrichment in progress	Customer order for which the order enrichment process is in progress.
Enrichment on hold	Customer order for which the order enrichment process is on hold.
Acknowledged	Customer order that the fulfillment manager approved for fulfillment processing.

Customer order state	Description
Rejected	Customer order that the fulfillment manager rejected for fulfillment processing.
In Process	Customer order that has been approved and is being actively worked on. To learn more, see Review and update the customer order fulfillment tasks .
Revision in Progress	Customer order revision that is in process but has not been approved. As part of the Inflight Order Change functions, when you are currently in the process of updating the customer order, it moves to this state.
Awaiting information	Customer order that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place.
On Hold	Customer order that is on hold. No further fulfillment processing can take place until the hold is removed.
Canceled	Customer order that the fulfillment manager canceled. No further fulfillment processing can take place.
Assessing Cancellation	As part of the Inflight Order Change functions, when a cancellation request is submitted for the customer order, it moves to this state. A cancellation request has been submitted for the customer order.
Cancellation in Progress	When the cancellation request is approved, the customer order moves to this state.
Canceled	Customer order that the fulfillment manager canceled. No further fulfillment processing can take place.
Completed	All associated customer order line items are complete. Note: After your agents complete all fulfillment tasks for the entire customer order, the following actions occur: • The State field for the customer order is automatically set to Completed. • The State field for each of the individual customer order line items is set to Completed.

Note:

To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled customer order states, see the following:

- [Managing inflight order changes and cancellation requests](#)
- [Key inflight order change and cancellation request fields](#)

Order Line Item form states

Use the **State** field on the Order Line Item form to determine the current processing state for an individual customer order line item. You can also use it to perform certain types of customer order actions, such as canceling a line item. To learn more, see : [Reviewing the line items and related details for a customer order](#) and .

Customer order line item state	Description
Draft	Parent customer order that is still in the data capture stage or the manual entry of the customer order is not completed. The data capture phase is when your instance is capturing full customer order details from an API or through Service Exchange. In this case, Draft is a system-assigned state. This state is assigned by the system.
Submitted	Order line item of the customer order that the order agent has submitted.
Enrichment in progress	Order line item of the customer order for which the order enrichment process is in progress.
Enrichment on hold	Order line item of the customer order for which the order enrichment process is on hold.
New	Data capture process for the parent customer order that is complete and the customer order line item is awaiting fulfillment approval by the fulfillment manager. After the customer order capture is complete, it automatically moves to the New state. Note: When you manually enter a customer order and its order line items, you can assign a Draft or New state, based on your organization's published procedures.
Acknowledged	Customer order line item that the fulfillment manager approved for fulfillment processing.
Rejected	Customer order line item that the fulfillment manager rejected for fulfillment processing. No further fulfillment processing can take place.

Customer order line item state	Description
In Process	Customer order line item that is still in process but not ready for fulfillment approval.
Revision in Progress	Customer order line item revision that is in process but has not been approved. To learn more, see the following: • Managing inflight order changes and cancellation requests • Key inflight order change and cancellation request fields
Awaiting information	Customer order line item that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place.
On Hold	Customer order line item that is on hold. No further fulfillment processing can take place until the hold is removed.
Assessing Cancellation	As part of the Inflight Order Change functions, when a cancellation request is submitted for the customer order line item, it moves to this state. To learn more, see the following: • Managing inflight order changes and cancellation requests • Key inflight order change and cancellation request fields
Cancellation in Progress	When the cancellation request is approved, the customer order line item moves to this state. To learn more, see the following: • Managing inflight order changes and cancellation requests • Key inflight order change and cancellation request fields
Canceled	Customer order line item that the fulfillment manager canceled. No further fulfillment processing can take place.
Completed	Customer order line item and all associated domain orders and order tasks that are complete.

Customer order line item state	Description
	Note: After your agents complete all fulfillment tasks for the entire customer order, the following actions occur: • The State field for the customer order is automatically set to Completed. • The State field for each of the individual customer order line items is set to Completed.

Note:

To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled customer order line item states, see the following:

- [Managing inflight order changes and cancellation requests](#)
- [Key inflight order change and cancellation request fields](#)

Product Order, Service Order, and Resource Order form states

Use the **State** fields on the Product Order, Service Order, and Resource Order forms to determine the current processing state for a product order, service order, or resource order. To learn more, see the following:

- [Reviewing the product orders that are associated with a customer order line item](#)
- [Review the domain service orders that are associated with a product](#)
- [Review the domain resource orders associated with a customer order line item](#)

State	Description
Draft	New or waiting-to-start tasks that are assigned to the product, service, or resource order.
Qualified	All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start.
In Progress	Product, service, or resource order processing that is still in progress.
Closed Complete	Product, service, or resource order processing that is completed. Note: after your agents complete all fulfillment tasks for the product, service, or resource order, the state is automatically set to Closed Complete.

State	Description
Canceled	Product, service, or resource order processing that was canceled.

Order Task form states

Use the **State** field on the Order Task form to determine the processing state for an order task. To learn more, see [Review and update the customer order fulfillment tasks](#).

Order task state	Description
On Hold	Order task that is on hold. No further fulfillment processing can take place until the hold is removed. If you created a fallout record for it, the state of the order task changes to On Hold until the person or group that is assigned to the fallout record resolves the issue.
Open	Processing for the order task that is open and no processing is currently taking place.
In Process	Processing for the order task that is still in progress or in fulfillment.
Closed Complete	Processing for the order task that is complete. It is a system-assigned state.
	Note: After your agents complete all fulfillment tasks for the order task, the state is automatically set to Closed Complete.
Canceled	Processing for the order task that was canceled.

[End]

[store-future: BEGIN review]

Domain separation and Order Management

Domain separation is supported for Order 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

- 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 Order Fulfillment module in Order Management supports domain separation at an account level. All customer orders, order line items, and order tasks have account (customer) level separation.

How domain separation works in Order Management

- Ensure that the account is domain separated according to the domain separation guidelines in Customer Service Management. For more information, see [Domain separation and Customer Service Management](#) .
- Customer orders, customer order line items, service orders, service order lines, and order tasks are domain separated using the account name.
- If an administrator assigns fulfillment agents and managers to work on customer orders, service orders, and order tasks for a specific domain, they can work on these types of transactions across accounts.

Domain separated tables

- Customer Order
- Customer Order Line Item
- Customer Order Characteristic Value
- Service Order
- Service Order Line Item
- Service Order Characteristic Value
- Order Tasks
- Product Order
- Resource Order
- Contract product offering

Use cases

If customer or service orders have an account name, an administrator can identify and separate customer or service orders for different domains.

If fulfillment agents or managers are assigned to a domain, an administrator can assign them to work on customer orders, service orders, and order tasks for a specific domain (account).

Related topics

[Select, review, revise, or request cancellation of a customer order](#)

[Reviewing the line items and related details for a customer order](#)

[Review and update the characteristic values on a customer order](#)

[Review and update the customer order fulfillment tasks](#)

Reviewing the product orders that are associated with a customer order line item

Review the domain resource orders associated with a customer order line item

[End]

[store-future: BEGIN review]

Fallout Management forms

The Fallout Management workspace and Fallout forms enable you to select, review, and modify the order fallout records.

[End]

[store-future: BEGIN review]

Create Fallout form fields

The Create Fallout form enables you to manually create order fallout records.

Field	Description
Number	Unique system-assigned fallout number, starting with a prefix of FO.
Fallout Type	Category that indicates the type of fallout activity. Billing Issue Billing issues and disputes that exist for the ordered item. Inventory Allocation Failure Inadequate inventory. An ordered item can't be fulfilled. Provisioning Failure Associated system that is unavailable due to connectivity problems, timeouts, or other issues. Note: You can also create additional fallout types, as per the requirements of your enterprise. To learn more, see Create additional fallout types. To view the associated details or search for another fallout type: - Click the detail icon (🔍) to view the associated details for the fallout type. - Click the search icon (🔍) to search and select another fallout type.

Field	Description
Related order task	Identifier of the order task that the fallout record originated from.
Order Line Item	Identifier of the customer or service order line item that the fallout record originated from.
State	Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record, depending on where it currently resides in the processing cycle. Open Fallout record that is new and not currently assigned to a person to work on. In Progress Fallout record that is assigned and currently being worked on. On Hold Fallout record that is on hold. No further fallout processing can take place until you release the hold. Awaiting Information Fallout record that is on hold and waiting for more information before processing can proceed. Resolved Fallout issue that has a resolution but you have not formally closed it. Closed Completed Fallout record that is complete and closed. Canceled Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place.
Priority	Relative priority or importance of the fallout record. 1-Critical

Field	Description
	Fallout record that has urgent time criticality that requires immediate attention. 2-High Fallout record that has a high time criticality, though not as urgent as a Critical priority fallout. 3-Moderate Fallout record that has a medium time criticality and urgency. 4-Low Fallout record that has a low time criticality and urgency. 5-Planning Fallout record that was created for planning purposes.
Assignment group	Name of the assigned group that is responsible for acting on the fallout record.
Assigned to	Name of the assigned person who is responsible for acting on the fallout record.
Short description	Short description of the fallout task.
Work notes (Private)	Free-form private work note text for internal purposes only. The customer can't see this detail.
Attachments	File attachments for the fallout record. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

Fallout workspace fields

The Fallout Management workspace form enables you to select the order fallout records for review and modification.

Title	Description
Open	Number of open fallout records that require review and action.

Tile	Description
	1. Click this tile to see the Open list. 2. Select the open fallout record that you want to review.
Unassigned	Number of unassigned fallout records that require assignment and action. 1. Click this tile to see the Unassigned list. 2. Select the unassigned fallout record that you want to review.
High Priority	Number of open fallout records assigned a high priority. 1. Click this tile to see the High Priority list. 2. Select the unassigned fallout record that you want to review.
Open Fallouts	Pie chart that indicates the number and percentage of fallout records that are in process, or in the process of cancellation. 1. Click this tile to see the Open Fallouts list. 2. Select the fallout record that you want to review.
Open Fallouts by Type	Pie chart that indicates the number and percentage of fallout records by fallout type. 1. Click this tile to see the Open Fallout by Type lists. 2. Select the fallout record that you want to review.
Fallout resolution trends	Number of fallout records that were resolved during the past four months.
My active tasks	Listing of the active tasks for the fallout records assigned to the logged in user. The following information appears: Number Unique system-assigned task number that starts with a prefix of TASK. Priority Relative priority or importance of the active task. 1-Critical Task with urgent time criticality that

Title	Description
	requires immediate attention. 2-High Task with high time criticality, though not as urgent as a Critical priority order task. 3-Moderate Task with medium time criticality and urgency. 4-Low Task with low time criticality and urgency. Short description Short description of the task. State Current state for the order task. Open Processing for the task is open, and no processing is taking place. In Progress Processing for the task is still in progress, or in fulfillment. Closed Complete Processing for the task is complete. It is a system-assigned state. Canceled Processing for the task was canceled.
[End] [store-future: BEGIN review] Fallout form fields The Fallout form enables you to verify an order fallout record.	

Field	Description
Fallout Type	Category that indicates the type of fallout activity. Billing Issue Billing issues and disputes that exist for the ordered item. Inventory Allocation Failure Inadequate inventory. An ordered item can't be fulfilled. Provisioning Failure Associated system that is unavailable due to connectivity problems, timeouts, or other issues. Note: You can also create additional fallout types, as per the requirements of your enterprise. To learn more, see Create additional fallout types. To view the associated details or search for another fallout type: - Click the detail icon (ⓘ) to view the associated details for the fallout type. - Click the search icon (🔍) to search and select another fallout type.
Priority	Relative priority or importance of the fallout record. 1-Critical Fallout record that has urgent time criticality that requires immediate attention. 2-High Fallout record that has a high time criticality, though not as urgent as a Critical priority fallout. 3-Moderate Fallout record that has a medium time criticality and urgency. 4-Low Fallout record that has a low time criticality and urgency. 5-Planning

Field	Description
	Fallout record that was created for planning purposes.
State	Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record, depending on where it currently resides in the processing cycle. Open Fallout record that is new and not currently assigned to a person to work on. In Progress Fallout record that is assigned and currently being worked on. On Hold Fallout record that is on hold. No further fallout processing can take place until you release the hold. Awaiting Information Fallout record that is on hold and waiting for more information before processing can proceed. Resolved Fallout issue that has a resolution but you have not formally closed it. Closed Completed Fallout record that is complete and closed. Canceled Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place.

[End]

[store-future: BEGIN review]

Fallout form detail fields

The Fallout detail form enables you to review and modify an order fallout record.

Field	Description
Number	Unique system-assigned fallout number, starting with a prefix of FO.
Short description	Short description of the fallout task.
Work notes (Private)	Free-form private work note text for internal purposes only. The customer can't see this detail.
Assignment group	Name of the assigned group that is responsible for acting on the fallout record.
Assigned to	Name of the assigned person who is responsible for acting on the fallout record. Note: The user that you select should have an assigned Fallout Agent [sn_fallout_mgmt.fallout_agent] role. To learn more, see Assigning order fulfillment and provider roles.
Activity	Listing of the processing activities and changes in the field values that have taken place for the fallout record. To expand, collapse, or filter by activity stream: - Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: ... Expand all posts Collapse all posts Filter by conversation
Attachments	File attachments for the fallout record. Click Browse to add the file as an attachment.
[End]	
[store-future: BEGIN review]	

Order Characteristics Values form in Order Management for Telecommunications, Media, and Technology

The Order Characteristics Values form enables you to review and modify order characteristics for a service order.

Field	Description
Specification	Service specification that is associated with the service order characteristic. To view specification details, click the service specification. To learn more, see Review and update the service specifications for service order line item .
Characteristic	Selected characteristic, for example, Data Pack, for the service order line item. To view and update the characteristic details, click the characteristic. These details include the characteristic name, description, and input type.
Characteristic Value	Value that you selected for the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. To view and update the characteristic value details, click the characteristic value. These values include the following: • Name of the associated specification • Characteristic name • Selected characteristic value • Associated characteristic option • Associated service order line item
Characteristic Option	Name of the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. To view and update the characteristic option details, click the characteristic option. These values include the name of the characteristic option and the associated characteristics.

[End]

[store-future: BEGIN review]

Customer order line items form in Order Management for Telecommunications, Media, and Technology

The Order Line Items form enables you to select, review, and modify the captured customer order line items.

[End]

[store-future: BEGIN review]

Order Line Items form - line item details fields

The Order Line Items form line item details section enables you to review and modify general details for a customer order line item.

Field	Description
Number	Unique system-assigned number of the order line item.
Order	Unique system-assigned number for the customer order. Both customer orders and service orders have an assigned ID with a prefix of ORD.
Product Specification	Product specification that is associated with the order line item. To learn more, see Create and publish product specifications .
Version	Current version of the customer order line item. Indicates the number of times that you revised the customer order line item during the fulfillment process. A new order line item without any revisions has a version of 1 (one) and automatically increments for each inflight revision.
Order Category	Category that indicates the type of order line item. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. Note: Like a captured service order, customer orders have an ID with a prefix of ORD(nnn). The Order Category field enables you to identify the type of order.
State	Indicator of the current processing state for this customer order line item. To view a listing of the state selections, click the down arrow icon (▼).

Field	Description
	Note: To view a comprehensive listing of the customer order line item states with detailed descriptions, see Customer order states.
Model	Product offering purchased by the customer. To learn more, see Create your product offerings and publish to a catalog .
Quantity	Line item order quantity.
PONR	Option that indicates if this order line item is past the Point of No Return. • If selected, it indicates that you can't revise the order line item or request a cancellation for it while the fulfillment process is in progress. ○ You can't click Revise Order or Cancel Order to attempt to change the order line item or to request a cancellation for it. ○ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order. • If cleared, you can still revise the order line item or request a cancellation for it. The value for this option is a system-assigned flag that you can't manually update.
Revision Operation	Indicates the type of revision operation, if any, that is taking place in the current version of the customer order line item: None No update or cancellation is taking place for the customer order line item. This setting is the default for new customer orders. Update A Characteristic, Contact, or Price inflight revision has been submitted for the customer order line item.

Field	Description
Order line action	Cancel The customer order line item is canceled or in the process of being canceled.
	Indicates the type of action that is taking place in the order line item.
	Suspend Suspension is taking place for the customer order line item.
	Resume Resume of services is taking place for the customer order line item.
Short Description	No change No change is taking place for the customer order line item.
	Short description of the purchased product offering.

[End]

[store-future: BEGIN review]

Order line items form - pricing detail fields

The Order Line Items form - pricing details section enables you to review and modify the pricing details for a customer order line item.

Field	Description
Monthly Recurring Charges	Total monthly recurring charges for this order line item. An example is a monthly line charge.
Non Recurring Charges	Total non-recurring charges for this order line item. An example is a one-time installation fee.
Contract	ID for the service contract, if any, that is associated with the customer order.
Total Price	Total price for this order line item.

[End]

[store-future: BEGIN review]

Order line items form - other details fields

The Order Line Items form - other details section enables you to review and modify the additional details for a customer order line item.

Field	Description
Shipping Address	Line item shipping address section.
Street	Destination street address.
City	Name of the destination city.
State	Name of the destination U.S. state or Canadian province.
Zip / Postal Code	Destination U.S. ZIP code or Canadian postal code.
Notes	Additional comments block.
Additional comments	Additional free-form internal comment text for the order line item.
Work notes	Free-form internal work order text for the order line item.
Compose	Comment or private work note text block.
Comments / Work notes (Private)	Free-form comment or private work note text: - Click the comments icon () to enter the comment text for the order line item so that everyone, including the customer, can see. Enter the comment text, and then click Post Comments. - Click the work notes (private) icon () to enter the work note text for internal purposes only so that the customer can't see it. Enter the work note text, and then click Post Work notes (Private).
Activity	Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and

Field	Description
	fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions: • Click the activity stream filter icon () to filter by additional comments, attachments, or state. • Click the more options icon (), and then select the appropriate one: 
Attachments	File attachments for the order line item. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

Order line items form - Product Specification form fields

The Order line items form - Product Specification section enables you to review and modify the product specifications details for a customer order line item.

Field	Description
Number	Unique system-assigned product specification number.
Name	Name of the product specification.
Type	Type of specification. Goods Specification for the goods that you sell. Service Specification for a service that you provide to your customer. Network Product specification for a network.

Field	Description
Start Date	Effective start date of the product specification.
End Date	Effective expiration date of the product specification.
Description	Short description of the product specification.
State	State of the product specification. Published Indicates a published product specification for use in a product offering.
Product Code	Product code for the specification.
Product Line	Product line for the specification.
Cost to Company	Cost to the company for this product specification. This field is for profit-calculation purposes only.
Composite	Option that designates that the product specification is a complex enterprise product specification. A composite product is typically comprised of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they constitute a single complex product.
Installation required	Option that indicates if the associated product requires installation at the customer site.
Location Specific	Option that designates that this product specification requires you to enter the location details into a customer order for fulfillment and installation.

[End]

[store-future: BEGIN review]

Order Line Items form (service orders)

The Order Line Items form - line item details section enables you to review and modify the general details for a service order line item.

Field	Description
Order Line	Unique system-assigned service order line item number.
Order	Unique system-assigned service order number. Both customer orders and service orders have an assigned ID with a prefix of ORD.
Service Specification	Service specification that is associated with the order line item. To learn more, see Create and publish service specifications .
Version	Current version of the service order line item. The version number indicates the number of times that you revised the service order line item during the fulfillment process. A new order line item without any revisions has a version of 1 (one) and automatically increments for each inflight revision.
Order Category	Category that indicates the type of order. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. Note: Like a customer order, service orders have an ID with a prefix of ORD(nnn). The Order Category field enables you to easily identify the type of order.
State	Unless indicated, the service order manager manually assigns the appropriate state to the service order line item, depending on where it resides in your processing and fulfillment cycle. To view a listing of the state selections, click the down arrow icon (▼). Note: To view a comprehensive listing of service order line item states with detailed descriptions, see Service order states.

Field	Description
Model	Model number of the product that requires servicing. Each service and resource specification maps to a service and resource model to create inventory records for the customer and order.
Quantity	Service order line item quantity.
PONR	Option that indicates if this order is past the Point of No Return. • If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress. ○ You can't click Revise Order or Cancel Order to attempt to change the order line item or to request a cancellation for it. ○ If any order line item is designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order. • If cleared, you can still revise the order or request a cancellation for it. The value for this option is a system-assigned flag that you can't manually update.
Revision Operation	Type of revision operation, if any, that is taking place in the current version of the service order: None No update or cancellation is taking place for the service order. This setting is the default for new orders. Update A Contact, Characteristic, or Price inflight revision has been submitted for the service order. Cancel The service order is canceled or in the process of being canceled.

Field	Description
Short Description	Short description of the purchased product offering.
Shipping Address	Line item shipping address section
Street	Destination street address.
City	Name of the destination city.
State	Name of the destination U.S. state or Canadian province.
Zip / Postal Code	Destination U.S. ZIP code or Canadian postal code.
Notes	Additional comments block
Another comments	Additional free-form internal comment text for the service order line item.
Work notes	Free-form internal work order text for the service order line item.
Compose	Comment/private work note text block.
Comments / Work notes (Private)	Free-form comment or private work note text: - Click the comments icon () to enter the comment text for the service order line item so that everyone, including the customer, can see. Enter the comment text, and then click Post Comments. - Click the work notes (private) icon () to enter the work note text for internal purposes only so that the customer can't see it. Enter the work note text, and then click Post Work notes (Private).
Activity	Listing of the processing activities and changes in field values that have taken place for the order and order line item. This activity includes messages that indicate approval of the order for processing and fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions:

Field	Description
	- Click the activity stream filter icon (🔍) to filter by additional comments, attachments, or state. - Click the more options icon (...), and then select the appropriate ... Expand all posts Collapse all posts Filter by conversation
Attachments	File attachments for the service order line item. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

Order Task form in Order Management for Telecommunications, Media, and Technology

The Order Task form enables you to review and update the fulfillment tasks that are associated with the selected order.

Field	Description
Details	Order task details section.
Number	System-assigned ID for the task, starting with a prefix of TASK.
Account	Name of the customer account. Note: To view the associated field details, search for related records or open a calendar as follows: - Click the detail icon () to view the associated details for the field. - Click the search icon () to search for related records. - Click the calendar icon () to open a calendar so that you can select a date for the date entry fields.

Field	Description
Contact	Name of the account contact person.
Short Description	Short description of the order task.
State	Current state for the order task. To view a listing of selections, click the down arrow (▼) icon: Open Processing for the order task is open, and no processing is taking place. In Progress Processing for the order task is still in progress, or in fulfillment. Closed Complete Processing for the order task is complete. It is a system-assigned state. Note: After your agents complete all fulfillment tasks for the order task, the state is automatically set to Closed Complete. Canceled Processing for the order task was canceled.
Work notes	Free-form internal work order text for the order task.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click Post Work notes (Private) .
Activity	Activity stream section for viewing all processing activities that have taken place for the selected order task. It includes a message that indicates that the order has been approved for processing and fulfillment. To expand, collapse, or filter by activity stream:

Field	Description
	- Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: 
Attachments	File attachments for the order task. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

Product and domain order forms in Order Management for Telecommunications, Media, and Technology

The domain order forms enable you to review and modify the domain product orders, service orders, and resource orders for a selected customer order.

[End]

[store-future: BEGIN review]

Product Order form fields

The Product Order form enables you to review and modify the domain product orders that are associated with a selected customer order.

Field	Description
Product Order	Product order detail section.
Number	Unique system-assigned product order number.
Account	Name of the customer account.

Field	Description
	Note: To view the associated field details, search for related records or open a calendar as follows: - Click the detail icon (ⓘ) to view the associated details for the field. - Click the search icon (🔍) to search for related records. - Click the calendar icon (📅) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
Description	Short description of the product order.
State	Current state for the service order. To view a listing of selections, click the down arrow icon (▼):
Assignment group	Name of the group that the product order is assigned to for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent product order, if any, to this product order.
Short description	Short description for the product order.
Description	Extended description for the product order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click Post Work notes (Private) .

Field	Description
Activity	Activity stream section for viewing that all the processing activities and changes in field values have taken place for the product order. To expand, collapse, or filter by activity stream: - Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: 
Attachments	File attachments for the product order. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

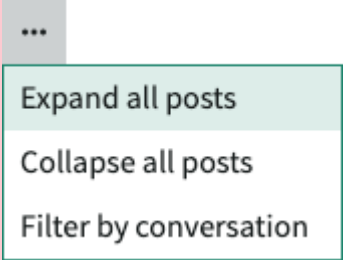
Service Order form fields

The Service Order form enables you to review and modify domain service orders that are associated with a selected customer order.

Field	Description
Service Order	Service order details section.
Number	Unique system-assigned service order number.
Account	Name of the customer account.

Field	Description
	Note: To view the associated field details, search for related records or open a calendar as follows: - Click the detail icon (ⓘ) to view the associated details for the field. - Click the search icon (🔍) to search for related records. - Click the calendar icon (📅) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
State	Current state for the service order. To view a listing of selections, click the down arrow icon (▼): Draft Product, service, or resource that has assigned new or waiting-to-start tasks. Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state. Note: After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.

Field	Description
	Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group that the service order is assigned to for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent service order, if any, to this service order.
Short description	Short description for the service order.
Description	Extended description for the service order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click Post Work notes (Private) .
Activity	Activity stream section for viewing all processing activities that have taken place to date for the service order. This listing has the processing activities and changes in the field values that have taken place for the service order. To expand, collapse, or filter by activity stream:

Field	Description
	- Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: 
Attachments	File attachments for the service order. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

Resource Order form fields

The Resource Order form enables you to review and modify domain resource orders associated with a selected customer order.

Field	Description
Resource Order	Resource order detail section.
Number	Unique system-assigned resource order number.
Account	Name of the customer account.  Note: To view the associated field details, search for related records or open a calendar as follows: - Click the detail icon () to view the associated details for the field. - Click the search icon () to search for related records. - Click the calendar icon () to open a calendar so that you can select a date for the date entry fields.

Field	Description
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
Short Description	Short description of the resource order.
State	Current state for the resource order. To view a listing of selections, click the down arrow icon (▼): Draft Product, service, or resource that has assigned new or waiting-to-start tasks. Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state. Note: After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group to which the resource order is assigned for completion of any remaining work.

Field	Description
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent resource order, if any, to this resource order.
Short description	Short description for the resource order.
Description	Extended description for the resource order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click Post Work notes (Private) .
Activity	Activity stream section for viewing all processing activities and changes in the field values that have taken place for the resource order. To expand, collapse, or filter by activity stream: - Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: ... Expand all posts Collapse all posts Filter by conversation
Attachments	File attachments for the resource order. Click Browse to add the file as an attachment.
[End]	
[store-future: BEGIN review]	

Product catalog forms

The product catalog forms enable you to create and publish product offerings so that your customers can order the products or services that they require.

[End]

[store-future: BEGIN review]

Characteristics form fields

The Characteristics form enables you to create characteristics and characteristic options.

Field	Description
Name	Name of the characteristic.
Description	Description of the characteristic.
Input Type	Type of input for this characteristic. Address Input for the entry of an address. Attachment Input for the attachment of an external document. CheckBox Option that you select or clear. Choice Options that you choose for the characteristic. If you select Choice, you can define options for the characteristic in the Characteristic Options related list. i Note: The SD-WAN Offering characteristics and characteristics are not part of the base system. Define your own characteristics and options for the SD-WAN Offering according to your requirements. Date Input for the entry of a date. Date/time Input for the entry of a date and time of day. Duration Input for the entry of a duration of time. Email

Field	Description
	Input for the entry of an email address. Label Input for the selection that enables the production of a label. Single Line Text Input for the free-form entry of a single line of text. Yes/No Input that requires the selection of a Yes/No response.

[End]

[store-future: BEGIN review]

Decomposition rules fields

The Decomposition Rules form enables you to create a decomposition rule that excludes the service specification when a customer does not select a specific option.

Field	Description
Characteristic	Product characteristic that the customer does not order that triggers the exclusion rule. You can select a characteristic that is associated with the product to trigger this exclusion. For example, if you select a routing characteristic for an SD-WAN product, the exclusion rule triggers if the customer does not order a routing characteristic.
Characteristic Option	Product characteristic option that the customer does not order that triggers the exclusion rule. • Select the option that is associated with the product. • Selecting an option makes the exclusion rule even more granular than if you had selected a characteristic only. For example, if you select a specific Routing characteristic option for an SD-WAN product, the exclusion rule triggers only if the customer does not order that option. If they select any other Routing option, it does not trigger the exclusion rule.
Source Specification	Source specification that you associate with the target specification in the selected specification relationship record.

Field	Description
Target Specification	Target specification that you associate the source specification with in the selected specification relationship record.

[End]

[store-future: BEGIN review]

Product offerings form fields

You can use the Product Offerings form to create and publish product offerings to a product catalog.

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

Field	Description
	Note: Only published specifications appear.
Contract Term	Term length of the contract
Monthly Recurring Charges	Monthly recurring charges for the contract, if any.
Non Recurring Charges	Any one-time fees for the contract, if any.
Description	Description of the product offering.
Offering Catalog	Offering catalog to add the product offering to. After you associate the product offering to a customer contract, the offering catalog is published to the customer instance. It appears as a category in the service catalog on the customer's self-service portal.
Distribution Channel	Distribution channel for the product offering.
Start Date	Date that the product offering is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is informational only and is not used for actual processing.
End Date	Date up until which the product offering is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and is not used for actual processing.
Description	Description of the product offering.
Initial Version	Name of the product offering at the time you created the initial version. You can't change this field.
Previous Version	Name of the previous version of the product offering. For example: - When you create the initial version of the product offering (for example, version 1), this field is empty. - When you create a version (version 2) with a slightly different name, the name of the product offering at its initial creation appears here. - When you create a subsequent version (version 3), the name of the product offering as it was at version 2 appears here.

Field	Description
	You can't change this field.
[End] [store-future: BEGIN review] Product specifications form fields The Product Specifications form enables you to create and publish a product specification to define all the products options that apply to a product.	
Field	Description
Number	Auto-generated ID for the product specification.
Name	Name of the product specification.
Version	Version number that is assigned to a specification: • When you create the initial version, 1 appears in this field, and can't be changed. • When you create subsequent versions of the specification, the next incremental number appears in this field after you click Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display Name	Displayed name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect. • When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. • When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: ◦ SD-WAN Edge Device is the name of the specification. ◦ Version 2 is the current version of the specification.
Category	Specification category to which the product specification belongs.
Type	Type of product specification.

Field	Description
	Goods Product specification for the type of goods that you sell. Service Product specification of a service that you sell or provide to your customer. Network Product specification of a network.
Start Date	Date that the specification is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is informational only and is not used for actual processing.
End Date	Date up until which the specification is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and is not used for actual processing.
Owner	Name of the person who is responsible for maintaining this specification. Click the search icon (🔍) to select the person.
Description	Description of the product specification.
State	State of the product specification. Draft Unpublished draft product specification that is assigned when you first create the specification record. Published Published product specification that is assigned when you formally publish it for use in a product offering. Retired Product specification that is retired and can no longer be used to create another specification version. Archived

Field	Description
	Product specification is no longer used in the ordering or fulfillment process.
Code	Product code of the specification.
Line	Product line of the specification.
Cost to Company	Cost to the company for this product specification. This field is for profit-calculation purposes only.
Composite	Option that designates that the product specification is a complex enterprise product specification. A composite product is typically comprised of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they constitute a single complex product.
Installation required	Option that designates that someone must install the product on site.
Location Specific	Option that designates that this product specification requires that you enter the location details into a customer order for fulfillment and installation.
Initial Version	Name of the base version of the specification that appears but can't be changed.
Previous Version	Name of the previous version of the specification. For example: • When you create the initial version of the specification (for example, version 1), this field is empty. • When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. • When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.

[End]

[store-future: BEGIN review]

Resource specifications form fields

You can use the Resource Specifications form to create and publish a resource specification to define all the resource options that apply to a telecommunications product.

Field	Description
Number	Auto-generated ID for the resource specification.
Name	Name of the resource specification.
Version	Version number that is assigned to a specification: • When you create the initial version, 1 appears in this field, and can't be changed. • When you create subsequent versions of the specification, the next incremental number appears in this field after you click Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display Name	Displayed name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect. • When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. • When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: ◦ SD-WAN Edge Device is the name of the specification. ◦ Version 2 is the current version of the specification.
Category	Specification category that the resource specification belongs to.
Type	Type of resource specification: Physical Physical item, such as a router or a handset. Logical Logical item, such as an IP address.
Start Date	Date that the specification is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is

Field	Description
	informational only and is not used for actual processing.
End Date	Date up until which the specification is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and is not used for actual processing.
Owner	Name of the person who is responsible for maintaining this specification. Click the search icon (🔍) to select the person.
Description	Description for the resource specification.
State	State of the resource specification. Draft Unpublished draft resource specification that is assigned when you first create the specification record. Published Published resource specification that is assigned when you formally publish it for use in a product offering. Retired Resource specification that is retired and can no longer be used to create another specification version. Archived Resource specification that is no longer used in the ordering or fulfillment process.
Product Model	Product model of the specification.
Cost to Company	Cost to the company for this resource specification. This field is for profit-calculation purposes only.
Composite	Option that designates that the resource specification is a parent that contains multiple child specifications.
Installation required	Option that designates that someone must install the product on site.
Location Specific	Option that designates that this resource specification requires the location details for fulfillment and installation.

Field	Description
Initial Version	Name of the base version of the specification that appears but can't be changed.
Previous Version	Name of the previous version of the specification. For example: - When you create the initial version of the specification (for example, version 1), this field is empty. - When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. - When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.

[End]

[store-future: BEGIN review]

Service specifications form fields

The Service specifications form enables you to create and publish a service specification to define all the service options that apply to a telecommunications product.

Field	Description
Number	Auto-generated ID for the service specification.
Name	Name of the service specification.
Version	Version number that is assigned to a specification: - When you create the initial version, 1 appears in this field, and can't be changed. - When you create subsequent versions of the specification, the next incremental number appears in this field after you click Create New Version. For example, 4 appears in this field if 3 was the previous version number.
Display Name	Displayed name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect.

Field	Description
	- When you create the initial, or base version of the specification (for example, version 1), you must enter free-form text, which is usually the name of the specification, into the field. - When you create versions of the specification, a system-assigned concatenation of the specification name and its current version number appears, but can be overwritten. For example, SD-WAN Edge Device v2 appears in this field when: - SD-WAN Edge Device is the name of the specification. - Version 2 is the current version of the specification.
Category	Specification category that the service specification belongs to. - If the selected category that belongs to 5G services, doesn't have any matching slice template, the system checks for existing templates. - If the selected category has multiple templates mapped to it, the systems chooses the latest published template to the specification.
Type	Type of service specification. Customer Facing Customers can create a ticket or a case for the service. Resource Facing Services are required for a resource to function properly. Not Applicable Service specification is not customer facing or resource facing.
Sub type	Sub-type of the specification. Choose Slice to define 5G network service specifications.

Field	Description
	Note: - When you select the sub type to Slice, the templates are automatically selected based on the mapping of templates with the specification categories of service specifications in the decision table. - If you select the sub type to None, you can manually select a template.
Start Date	Date that the specification is valid from. You can use this field when you create a version to indicate when it takes effect. However, it is informational only and is not used for actual processing.
End Date	Date up until which the specification is valid. You can use this field when you create a version to indicate when it is no longer in effect. However, it is informational only and is not used for actual processing.
Template	Templates that you've defined for the 5G services. Note: When you change a template, it deletes all the specification characteristics that are marked as true and are associated with the old template and re-associates the specification characteristics as per the new template that you've selected.
Owner	Name of the person who is responsible for maintaining this specification. Click the search icon (🔍) to select the person.
Description	Description for the service specification.
State	State of the service specification. Draft Unpublished draft service specification that is assigned when you first create the specification record. Published Published service specification that is assigned when you

Field	Description
	formally publish it for use in a product offering. Retired Service specification that is retired and can no longer be used to create another specification version. Archived Service specification is no longer used in the ordering or fulfillment process.
Code	Service code of the specification.
Line	Service line of the specification.
Cost to Company	Cost to the company for this service specification. This field is for profit-calculation purposes only.
Composite	Option that designates that the service specification is a parent specification composed of multiple child specifications.
Installation required	Option that designates that someone must install the service on site.
Location Specific	Option that designates that this service specification requires the location details for fulfillment and installation.
Initial Version	Name of the base version of the specification that appears but can't be changed.
Previous Version	Name of the previous version of the specification. For example: • When you create the initial version of the specification (for example, version 1), this field is empty. • When you create a version (version 2) with a slightly different name, the name of the specification at its initial creation appears here. • When you create a subsequent version (version 3), the name of the specification as it was at version 2 appears here. You can't change this field.
[End]	
[store-future: BEGIN review]	

Specification Relationships related list fields

The Specification Relationships form enables you to create specification relationships and optional decomposition rules.

Field	Description
Source Specification	Product, service, or resource specification that you create the relationship from. For example, the source specification could be a product specification for an SD-WAN.
Target Type	Type of specification. To learn more, see Product catalog data model and catalog versioning .
Target Specification	Specification that you create the relationship to. For example, the target specification could be a service specification for an SD-WAN. Note: The target product, service, or resource specification you select can be in any state, including a Draft state. The selected specification does not have to be published before selecting it in this field.
Mandatory	Option that designates if the relationship between the selected source and target specifications is mandatory and should always exist when a customer orders the product. - If selected, the target specification is always included with the source specification. During the ordering process, you must select the characteristics and characteristic values for the target specification. For example, if you are defining an SD-WAN Service Package, you designate that the SD-WAN Edge Device and SD-WAN Controller target specifications are mandatory. - If cleared, it is an optional target specification and is only included with the product if the customer selected it during the ordering process. For example, if you designate that the SD-WAN Security specification is optional, it's included in an ordered SD-WAN Service Package only if the customer selected it during the ordering process.
Relationship Type	Type of relationship that designates how an order that contains the source specification

Field	Description
	decomposes for fulfillment after you receive and approve it. Composed of Source specification that is composed of the selected target specification. An order that contains the source specification and characteristics decompose into a single service order. Realized as Source specification that is realized as the selected target specification. Bundles Source specification bundles as the selected target specification. An order that contains the source specification and characteristics decompose into unique order line items for each of the target specifications bundled from that parent product specification. Requires Source specification that requires the selected target specification. To enable the delivery of the promised services within the specification, an order that contains the source specification and characteristics also requires the target resource specification.
Minimum Quantity	Required minimum number of specifications for an order.
Default Quantity	Default quantity if there is no selected amount.
Maximum Quantity	Maximum quantity of specifications.
Quantity Characteristic	Source specification characteristic that is used for quantity mapping. The quantity characteristic is supported only for a specification relationship in a product specification.
[End]	
[store-future: BEGIN review]	

Product Offering Versions form

The Product Offering form enables you to view version information for a selected product offering before you retire or archive it.

Product offering versions

Number	Auto-generated ID for the product offering.
Display Name	Displayed name that appears for the product offering in the ServiceNow AI Platform when this version of the product offering is in effect.
Version	Version number that is assigned to this product offering version.
State	State of the product offering version: Draft Unpublished draft product offering version that is assigned when you first create the specification record. Published Published product offering version that is assigned when you formally publish it for use in a product offering. Retired Product offering version that is retired and can no longer be used in a product catalog. Archived Product offering version that is archived in history tables for eventual deletion from the ServiceNow AI Platform.
Created	Date and time that the product offering version was created.
Created by	ID of the logged-in user who created the product offering version.
Updated	Date and time that the product offering version was last updated.
Updated by	ID of the logged-in user who last updated the product offering version.

[End]

[store-future: BEGIN review]

Restructured Order Management tables (San Diego release and above)

The table architecture that supports the Order Management for Telecommunications, Media, and Technology application has been restructured. Existing customers who upgraded from earlier releases to the San Diego release must first run a Post upgrade Script to reparent the order tables and then perform column promotions.

Before you use Order Management for Telecommunications, Media, and Technology (2.0.0), you must run the Post Upgrade Script after your upgrade to San Diego. For detailed information about this script, see the [Order Management for Telecommunications, Media, and Technology \(2.0.0\) version: Post upgrade reparenting script for the San Diego release \[KB1000941\]](#) article in the Now Support Knowledge Base.

Note:

If you do not run this script to perform table reparenting and column promotion, the order decomposition and order fulfillment functions do not work as designed. In these cases, the following error message appears after the approval of an order:

Some of the OMT tables need reparenting. Please contact system administrator to execute the reparenting script.

By using the [Now Support Portal](#), raise a new Case with the Technical Support team to assist you in applying these changes.

[End]

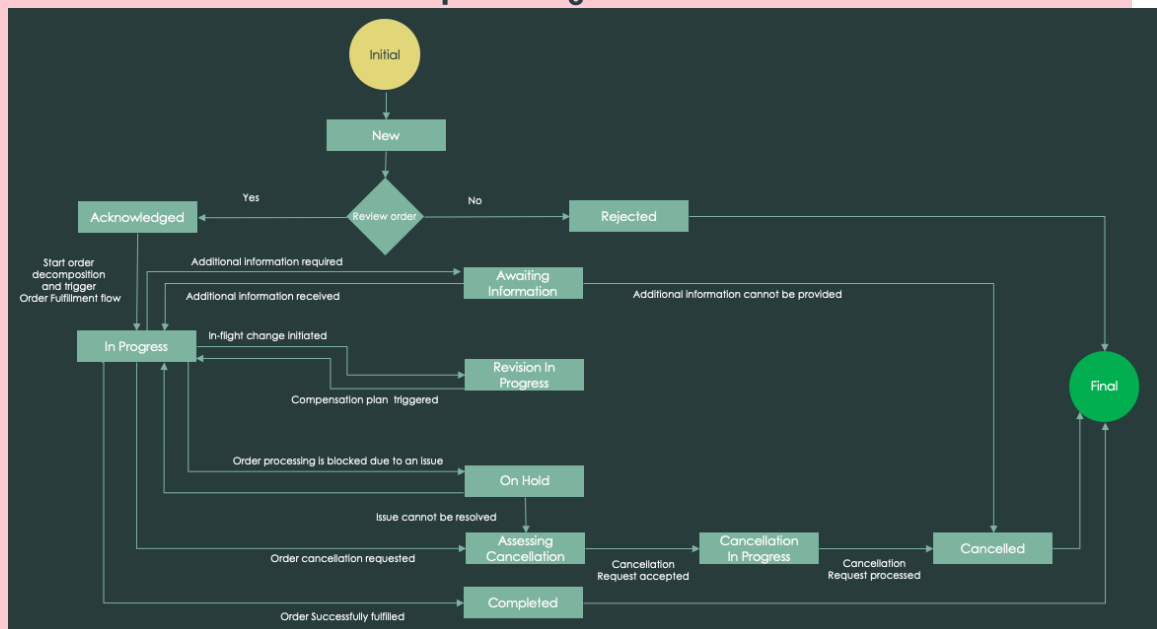
[store-future: BEGIN review]

Service order states

Use the **State** fields on the order management forms to determine the current processing state for the service order and to perform certain types of order actions, such as canceling an external service order.

The following flowchart illustrates how customer and service order state processing works.

Customer and service order state processing



Customer Order form states

Use the **State** field on the Customer Order form to determine the current processing state for the service order, including all of its associated line items. You can also use it to perform certain types of order actions, such as canceling a service order. To learn more, see [Select, review, revise, or request cancellation of a service order](#).

Service order state	Description
Draft	Service order that is still in the capture stage or the manual entry of the service order is not complete. The data capture phase is when your instance is capturing full service order details from the TMF641. Note: The Service Order Open API is a ServiceNow implementation of the TMForum TMF641 Service Ordering Open API specification. To learn more, see Service Order Open API. In this case, Draft is a system-assigned state. Note: The Draft state also applies to domain orders that are created by the decomposition process. These orders are awaiting additional information or for their turn in the initiate order fulfillment process.
New	Service order capture process that is complete and the entire order is awaiting approval by the service order manager. After the service order data capture completes, it automatically moves to the New state.
Acknowledged	Service order that the service order manager approved for fulfillment processing.
Rejected	Service order that the service order manager rejected for fulfillment processing.
In Process	Service order that has been approved and is being actively worked on. To learn more, see Review and update the customer order fulfillment tasks .
Revision in Progress	As part of the Inflight Order Change functions, when you are currently in the process of updating the service order, it moves to this state.
Awaiting information	Service order that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place.

Service order state	Description
On Hold	Service order that is on hold. No further fulfillment processing can take place until the removal of the hold.
Assessing Cancellation	Cancellation request that has been submitted for the service order. As part of the Inflight Order Change functions, when a cancellation request is submitted for the service order, it moves to this state.
Cancellation in Progress	When the cancellation request is approved, the service order moves to this state.
Canceled	Service order that the service order manager canceled. No further fulfillment processing can take place.
Completed	All associated service order line items are complete. Note: After your agents complete all fulfillment tasks for the entire captured service order, the following actions occur: • The State field for the captured service order is automatically set to Completed. • The State field for each of the individual captured service order line items is set to Completed.

Note:

To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled service order states, see

- [Managing inflight order changes and cancellation requests](#)
- [Key inflight order change and cancellation request fields](#)

Order Line Item form states

Use the **State** field on the Order Line Item form to determine the current processing state for an individual service order line item. You can also use it to perform certain types of order actions, such as canceling a line item. To learn more, see [Review the line items and related details for a service order](#).

Service order line item state	Description
Draft	Parent service order that is still in the data capture stage or the manual entry of the order is not complete.

Service order line item state	Description
	The data capture phase is when your instance is capturing full service order details from the TMF641. In this case, Draft is a system-assigned state.
New	Data capture process for the parent service order that is complete, and the service order line item is awaiting fulfillment approval by the service order manager. After the service order capture is complete, it automatically moves to the New state. Note: When you manually enter a service order and its order line items, you can assign a Draft or New state, based on your organization's published procedures.
Acknowledged	Service order line item that the service order manager approved for fulfillment processing.
Rejected	Service order line item that the service order manager rejected for fulfillment processing. No further fulfillment processing can take place.
In Process	Service order line item that is still in process but not ready for fulfillment approval.
Revision in Progress	Service order line item revision that is in process but has not been approved. As part of the Inflight Order Change functions, when you are currently in the process of updating the parent service order or this service order line item, it moves to this state.
Awaiting information	Service order line item that is in process but awaiting receipt of information from the customer before any further fulfillment processing takes place.
On Hold	Service order line item that is on hold. No further fulfillment processing can take place until the hold is removed.
Assessing Cancellation	Cancellation request that has been submitted for the service order line item. As part of the Inflight Order Change functions, when a cancellation request is submitted for the service order line item, it moves to this state.
Cancellation in Progress	When the cancellation request is approved, the service order line item moves to this state.

Service order line item state	Description
Canceled	Service order line item that the service order manager canceled. No further fulfillment processing can take place.
Completed	Service order line item and all associated and external service order tasks that are complete. It is a system-assigned state.
	Note: After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.

Note:

To learn more about Inflight Order Change functions and how they affect the Revision in Process, Assessing Cancellation, Cancellation in Progress, and Canceled service order line item states, see

- [Managing inflight order changes and cancellation requests](#)
- [Key inflight order change and cancellation request fields](#)

Order task form states

Use the **State** field on the Order Task form to determine the processing state for an order task. To learn more, see [Reviewing and updating the service order fulfillment tasks](#).

Order task state	Description
Open	Processing for the order task is open and no processing is currently taking place.
In Process	Processing for the order task is still in progress or in fulfillment.
Closed Complete	Processing for the order task is complete. It is a system-assigned state.
	Note: After your agents complete all fulfillment tasks for the order task, the state is automatically set to Closed Complete.
Canceled	Processing for the order task was canceled.

[End]

[store-future: BEGIN review]

Service Order Management workspace and Customer Order forms in Order Management for Telecommunications, Media, and Technology

The Service Order Management workspace and Customer Order forms enable you to select, review, and modify captured service orders.

[End]

[store-future: BEGIN review]

Service Order Management workspace fields

The Service Order Management workspace form enables you to select service orders for review and modification.

Tile	Description
New Orders	Number of new service orders that require review. 1. Click this tile to see the New Order list. 2. Select the new order you want to review. To learn more, see Reviewing the details for a service order.
Open Tasks	Number of open service order tasks that require review and action. 1. Click this tile to see the Open Tasks list. 2. Select the open order task you want to review. To learn more, see Reviewing and updating the service order fulfillment tasks.
Unassigned Tasks	Number of unassigned service order tasks that require assignment and action. 1. Click this tile to see the Unassigned Tasks list. 2. Select the unassigned order task that you want to review. To learn more, see Reviewing and updating the service order fulfillment tasks.
Open Fallouts	Number of open fallout records. 1. Click this tile to see the Open Fallouts list. 2. Select the fallout record that you want to review. To learn more, see Update a fallout record.
Open Service Orders	Pie chart that indicates the number and percentage of service orders that are in process or in the process of cancellation. 1. Click this tile to see the Current Service Order list. 2. Select the service order that you want to review.

Tile	Description
Service Order Fulfillment Trend	Number of service orders that were fulfilled during the last four months.
My Active Tasks	Listing of the active service order tasks that are assigned to the logged in user. The following information appears: Number Unique system-assigned task number that starts with a prefix of TASK. Priority Relative priority or importance of the active task. 1-Critical Task with urgent time criticality that requires immediate attention. 2-High Task with high time criticality, though not as urgent as a Critical priority order task. 3-Moderate Task with medium time criticality and urgency. 4-Low Task with low time criticality and urgency. Short description Short description of the task. State Current state for the task. Open Processing for the task is open, and no processing is taking place. In Progress Processing for the task is still in progress or in fulfillment.

Title	Description
	Closed Complete Processing for the task is complete. It is a system-assigned state. Canceled Processing for the order task was canceled.

[End]

[store-future: BEGIN review]

Customer Order form fields for service orders

The Order Line Items form line item details section enables you to review and modify the general details for a service order line item.

Field	Description
ORDnnnnnnnn	Unique system-assigned customer or service order number.
Account	Name of the customer account. Click the account name to review the account details: • Account name • Account number • Primary Contact • Parent Account (if any) • Registration Code • Customer or Partner check boxes, indicating if the account is a customer or business partner • Web site • Phone • Address
Contact	Name of the account contact person. Click the name to review the following contact details: • First and last name • Account name • Contact title • Language • Email address

Field	Description
	• Business and mobile phone number • Time zone • Notification indicator. You can use this information to enable or disable order notifications to the customer.

[End]

[store-future: BEGIN review]

Customer Order Details pane - service order details fields

The Customer Orders Details pane - service order details section enables you to review and modify the general details for a service order.

Field	Description
Order	Unique system-assigned service order number. Note: Both customer orders and service orders have an assigned ID with a prefix of ORD. To learn more about customer orders, see • Creating, changing, and cancelling manual product orders • Select, review, revise, or request cancellation of a customer order
Account	Name of the customer account. Note: To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon (ⓘ) to view the associated details for the field. • Click the search icon (🔍) to search for related records. • Click the calendar icon (📅) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the contact for the order.
Order Date	Date that you received the service order.

Field	Description
PONR	Option that indicates if this order is past the Point of No Return. • If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress. ○ You can't click Revise Order or Cancel Order to attempt to change the order line item or to request a cancellation for it. ○ If any order line item is designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order. • If cleared, you can still revise the order or request a cancellation for it. The value for this option is a system-assigned flag that you can't manually update.
Order Category	Category that indicates the type of order. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. Note: Like a customer order, service orders have an ID with a prefix of ORD(nnn). The Order Category field enables you to easily identify the type of order.
State	Indicator of the current processing state for the service order, including all of its associated line items. To view a listing of the state selections, click the down arrow icon (▼). Note: To view a comprehensive listing of service order states, with detailed descriptions, see Service order states.
Fulfillment Type	Type of fulfillment action for the service order.

Field	Description
	Deliver Deliver ordered items to the customer when the order is fulfilled. Qualify Check the feasibility of delivering the services requested on the service order. Without actually activating or delivering the services for the order, it usually processes with a different set of tasks. If all preceding tasks are complete, processing for the associated service or resource order tasks can start.
Version	Current version of the service order. Indicates the number of times that the service order was revised during the fulfillment process. A new order without any revisions has a version of 1 (one) and automatically increments for each inflight revision.
Revision Operation	Type of revision operation, if any, that is taking place in the current version of the service order: None No update or cancellation is taking place for the service order. This setting is the default for new orders. Update A Contact, Characteristic, or Price inflight revision has been submitted for the service order. Cancel The service order is canceled or in the process of being canceled.

[End]

[store-future: BEGIN review]

Customer Order Details pane - other service order details fields

The Customer Orders Details pane - other service order details section enables you to review and modify additional details for a service order.

[End]

[store-future: BEGIN review]

Service order-related domain order forms in Order Management for Telecommunications, Media, and Technology

The service order-related domain order forms enable you to review and modify the domain service orders, service specifications, and resource orders for a selected service order.

[End]

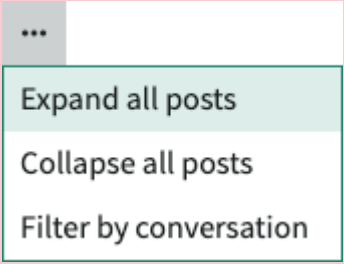
[store-future: BEGIN review]

Domain resource orders fields

The Domain Resource Order form enables you to review and modify the domain resource orders that are associated with a service order.

Field	Description
Resource Order	Resource order detail section.
Number	Unique system-assigned resource order number.
Account	Name of the customer account. Note: To view the associated field details, search for related records or open a calendar as follows: - Click the detail icon (ⓘ) to view the associated details for the field. - Click the search icon (🔍) to search for related records. - Click the calendar icon (📅) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
Short Description	Short description of the resource order.
State	Current state for the resource order. To view a listing of selections, click the down arrow icon (▼): Draft Product, service, or resource that has assigned new or waiting-to-start tasks.

Field	Description
	Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state. Note: After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group to which the resource order is assigned for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent resource order, if any, to this resource order.
Short description	Short description for the resource order.
Description	Extended description for the resource order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't

Field	Description
	see it. Enter the work note text, and then click Post Work notes (Private) .
Activity	Activity stream section for viewing all processing activities and changes in the field values that have taken place for the resource order. To expand, collapse, or filter by activity stream: - Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: 
Attachments	File attachments for the resource order. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

Domain service order fields

The Domain Service Order form enables you to review and modify the domain service orders that are associated with a service order.

Field	Description
Service Order	Service order details section.
Number	Unique system-assigned service order number.
Account	Name of the customer account.

Field	Description
	Note: To view the associated field details, search for related records or open a calendar as follows: - Click the detail icon (ⓘ) to view the associated details for the field. - Click the search icon (🔍) to search for related records. - Click the calendar icon (📅) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
State	Current state for the service order. To view a listing of selections, click the down arrow icon (▼): Draft Product, service, or resource that has assigned new or waiting-to-start tasks. Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state. Note: After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete.

Field	Description
	Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group that the service order is assigned to for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent service order, if any, to this service order.
Short description	Short description for the service order.
Description	Extended description for the service order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click Post Work notes (Private) .
Activity	Activity stream section for viewing all processing activities that have taken place to date for the service order. This listing has the processing activities and changes in the field values that have taken place for the service order. To expand, collapse, or filter by activity stream:

Field	Description
	- Click the activity stream filter icon () to filter by additional comments, attachments, or state. - Click the more options icon (), and then select the appropriate one: 
Attachments	File attachments for the service order. Click Browse to add the file as an attachment.

[End]

[store-future: BEGIN review]

Service specifications fields

The Service Specification form enables you to review and modify the service specifications that are associated with a service order.

Field	Description
Number	Unique system-assigned service specification number.
Name	Name of the service specification.
Type	Type of specification. Goods Specification for the goods that you sell. Service Specification for a service that you provide to your customer. Network Product specification for a network.
Start Date	Effective start date of the product specification.

Field	Description
End Date	Effective expiration date of the product specification.
Description	Short description of the service specification.
State	State of the service specification. Published Indicates a published service specification for use in a product offering
Product Code	Product code for the specification.
Product Line	Product line for the specification.
Cost to Company	Cost to the company for this service specification. This field is for profit-calculation purposes only.
Composite	Option that designates that the product specification is a complex enterprise product specification. A composite product is typically comprised of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they constitute a single complex product.
Installation required	Option that indicates if the associated product requires installation at the customer site.
Location Specific	Option that designates that this service specification requires you to enter the location details into a service order for fulfillment and installation.

[End]

[store-future: BEGIN review]

Specification Versions form in Order Management for Telecommunications, Media, and Technology

The Specification Versions form enables you to view version information for a selected specification before you retire or archive it.

Specification versions

Field	Description
Number	Auto-generated ID for the product specification version.
Display Name	Displayed name that appears for the specification in the ServiceNow AI Platform when this version of the specification is in effect.
Version	Version number that is assigned to this specification version.
State	State of the product specification version: Draft Unpublished draft product specification version that is assigned when you first create the specification record. Published Published product specification version that is assigned when you formally publish it for use in a product offering. Retired Product specification version that is retired and can't be used in a product offering or to create another specification version. Archived Product specification that is no longer being used in the ordering or fulfillment process.
Created	Date and time at which the specification version was created.
Created by	ID of the logged-in user who created the specification version.
Updated	Date and time at which the specification version was last updated.
Updated by	ID of the logged-in user who last updated the specification version.
[End]	