Yokohama Sales Customer Relationship Management

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Company Headquarters
2225 Lawson Lane
Santa Clara, CA 95054
United States
(408) 501-8550

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Sales Customer Relationship Management

Learn how you can use the ServiceNow® Sales Customer Relationship Management (Sales CRM) applications to manage the product sales life cycle in your organization. Your agents can use these applications to generate pre-sales leads and 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 CRM applications.

Configure



Plan and configure your Sales CRM implementation.

Use



Use the Sales CRM applications as an agent.

Integrate



Extend capabilities in Sales CRM by integrating with other applications.



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

Additional resources

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

Exploring Sales Customer Relationship Management

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

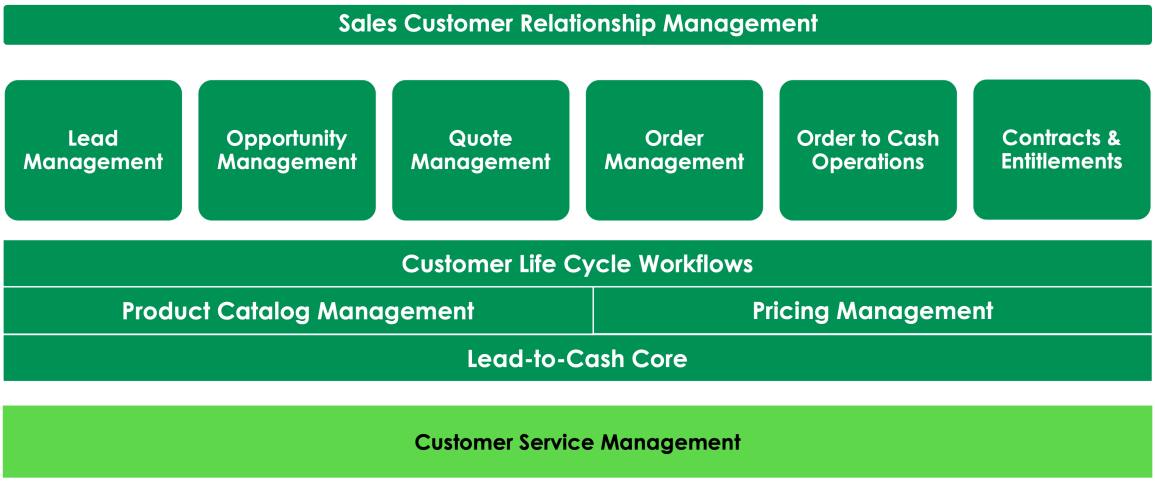
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Overview of Sales CRM

The Sales CRM applications enable you to manage the product sales life cycle in your organization, including pre-sales leads and opportunities, sales quote generation, order capture, order fulfillment, order and invoice cases, and post-sales order changes and contract renewals.

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

Sales CRM applications and key features



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 leads, opportunities, quotes, and orders in Sales Customer Relationship Management.

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

- Product catalog user interface: Launch from anywhere in opportunity, quote, and order capture workflows, enabling agents to browse and find products quickly with a full catalog search function.
- Catalog category hierarchy: Use hierarchical structures of catalogs and categories to organize products and services logically.
- Version control: Track changes made to product information over time, helping with transparency and auditability.
- Product offer eligibility: Filter your product catalogs, product offering categories, and product offerings so that agents sell customers only the products for which they're eligible.

Note:
Check your entitlements to determine if you have access to these features. Also, starting with the Yokohama release, customers can use the Business Portal with Order Management to create orders using the product catalog and product configurator. For more information on this self-service portal, see Using the Business Portal.

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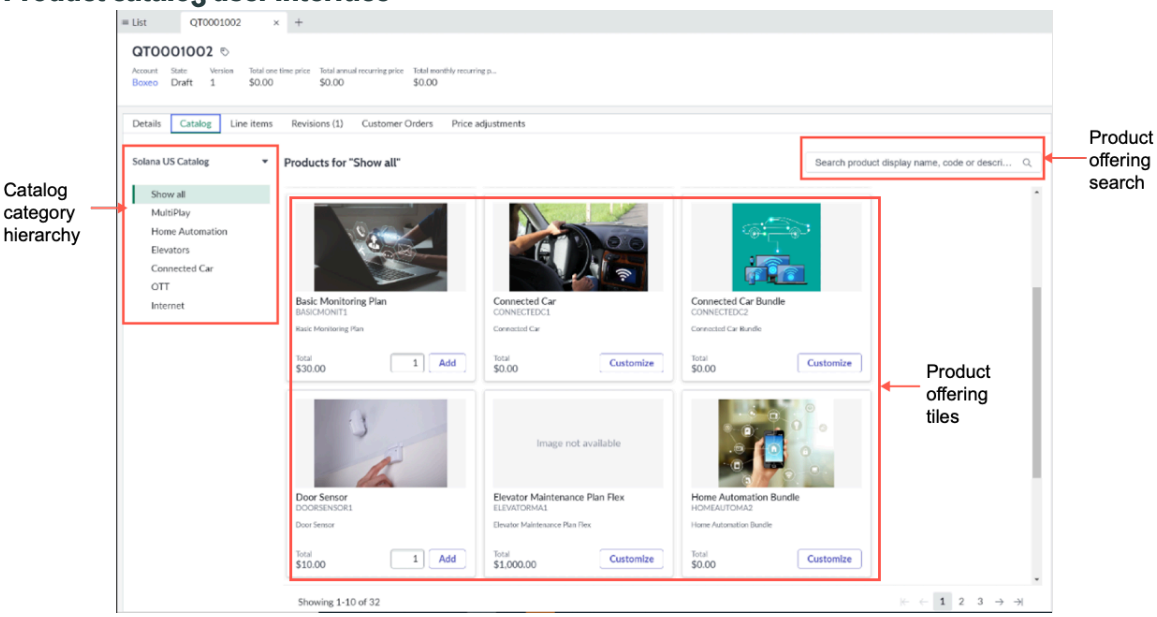
To learn more about setting up product offering catalogs, see Configuring product offerings and catalogs.

Product catalog UI

The product offering catalog enables agents to do the following:

- Browse and search product offerings by using keywords, descriptions, and industry codes.
- Review product offers that are organized by catalog category hierarchy, which streamlines catalog navigation.

Product catalog user interface



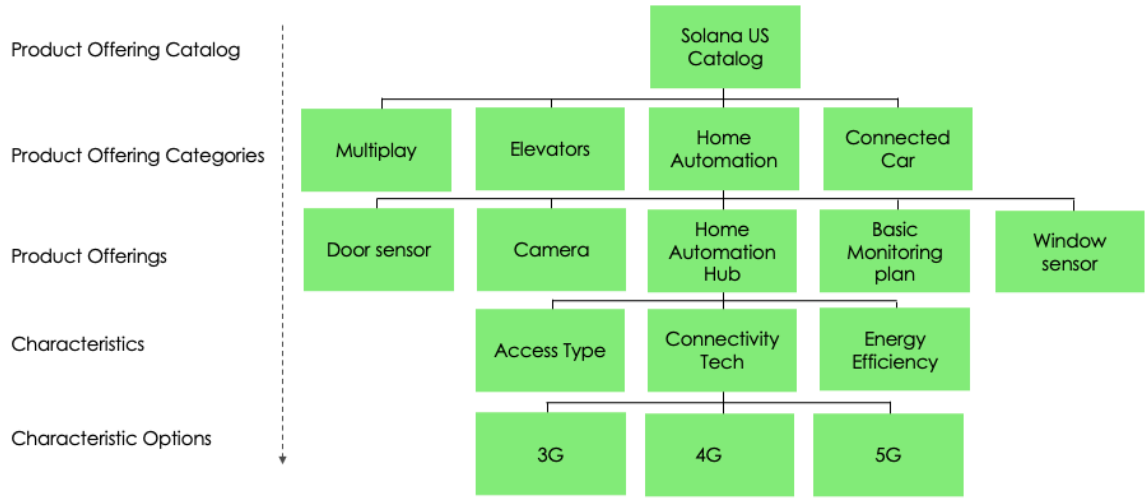
Product offering catalogs and categories

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.

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Example catalog hierarchy with categories and product offerings



Product offer bundling

You can create product offer bundles with an offer hierarchy using product offer relationships and relationship groups. These bundle offers can have references to a product specification or specification hierarchy at any level in the bundle. For more information, see Product offer bundling with product specifications.

Product offer eligibility

As a product catalog admin or manager, you can use business rules to filter the product catalog, product offering categories, and product offerings dynamically, displaying only the appropriate catalog, categories, and offerings for which a customer is eligible. These rules enable your sales agents to sell the correct products to customers based on context, such as specific customer accounts, customer location, sales contracts, and more. You define these rules using product eligibility matrices. To learn more about using the product eligibility matrices, see Configuring product offer eligibility.

Product recommendations

In Sales Customer Relationship Management, different types of product recommendations are available to your sales agents. Your agents can get product recommendations as they're generating or updating leads and opportunities, or updating quotes.

- Product recommendations using needs analysis - When your sales agents are generating leads and opportunities, they can use product selection guides to help determine relevant products for their customers. For information on setting up needs analysis, including the product selection guides, see Configuring needs analysis. For details on how your agents can get product recommendations for leads and opportunities, see Get product recommendations for leads using needs analysis and Get product recommendations for opportunities using needs analysis.
- Product offering recommendations for quotes - When your sales agents are updating quotes, they can get product recommendations for upselling or cross-selling additional products for existing quote line items. For information on setting up these recommendations, see Configuring product offering recommendations. For details on how product offering recommendations work in quotes, see Using product offering recommendations in quotes.

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Pricing Management

The Pricing Management application enables your organization to set, manage, and optimize pricing strategies for any Sales Customer Relationship Management solution. These pricing strategies enable your sales team to generate opportunities, quotes, and orders with accurate and competitive pricing quickly.

The Pricing Management application is the foundation of any Sales Customer Relationship Management solution. Pricing Management provides various features to implement pricing in your organization.

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

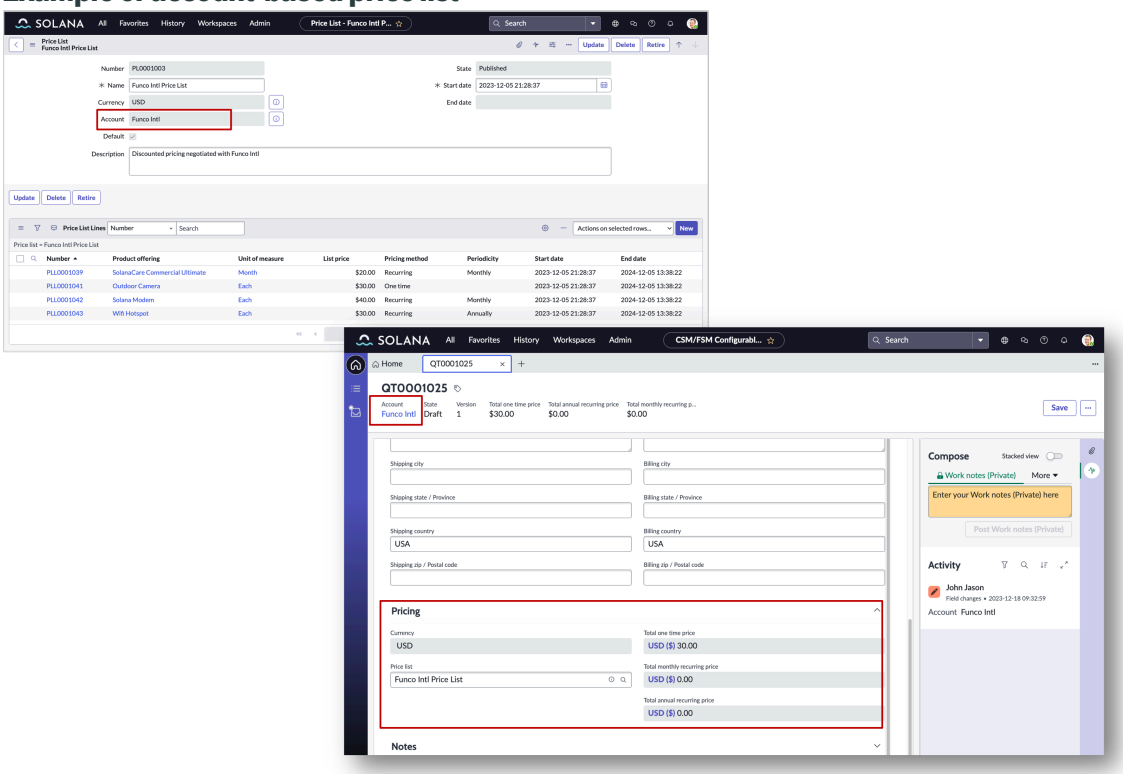
Price lists

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 admins or managers create price lists and add price list lines that define the list price for each of your product offerings. They can also copy a published price list and its price list lines and use the copy to update the pricing or reuse the price list without having to create a new price list.

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



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Pricing methods

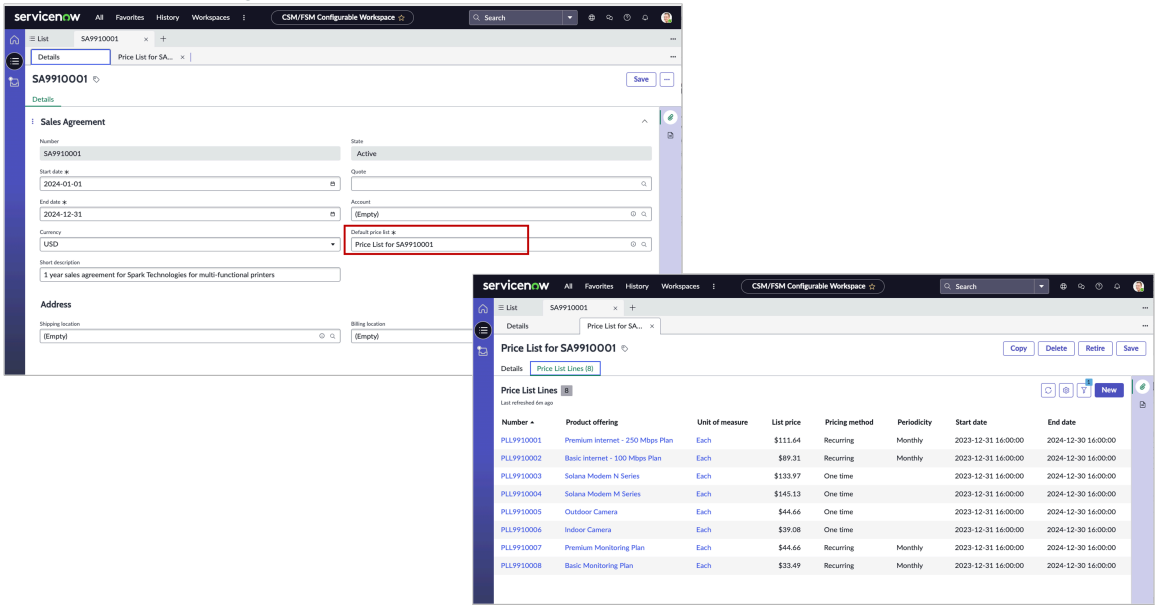
The pricing method is either a one-time fee or a recurring pricing fee with monthly and annual frequencies. The pricing method is set in product offerings and is displayed in price list lines.

For details on setting up and managing price list features, see Configuring product pricing.

Sales Agreement price lists

If you're using the Sales Agreement feature, a published sales agreement price list is generated automatically when a sales agent creates a sales agreement from a completed quote. The sales agreement price list reflects the final unit price for each product that is captured as part of the sales agreement. The sales agreement price list is valid for the start and end dates specified for the agreement. To learn more about sales agreements, see Sales Agreement Management.

Example of sales agreement price list

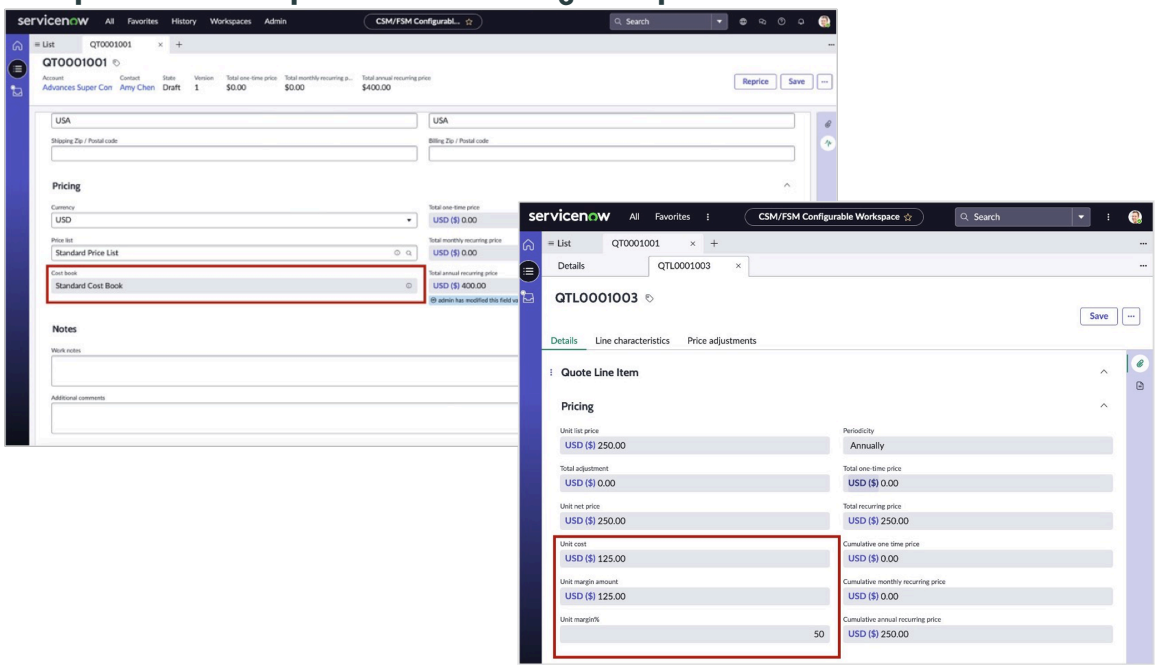


Cost books

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.

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Example cost book in quote details and margins in quote line



Your pricing admins or managers create a cost book and add a cost book line to set the unit cost for each product offering. They can also copy a published cost book and its cost book lines to revise costs in the cost book (update the copy) or reuse a cost book without having to create a new one. For details on setting up 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 or cost book 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:

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- **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.
- **Cost Book Defaulting**: Select the default cost book to be used, for example the standard cost book or an account-specific cost book. To learn more about configuring this matrix, see Control the default cost book 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 matrixes. 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 custom 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.

Matrix validations

As an admin, you can use system-defined validations or set your own validations to validate rows entered into the decision tables for pricing and product eligibility rule matrices. For more information on these validations, see Configuring matrix validation rules.

Pricing plans

Starting with the November 2024 release, Pricing Management provides a default pricing plan that defines the sequence of steps in which pricing calculations and adjustments are applied to determine final product prices. Adjustments include the pricing changes set in the pricing adjustment matrices. You can use the default plan, or you can copy the default plan and customize it by adding or changing the pricing steps to tailor it for your organization. To learn more, see Configurable pricing plans.

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.
- Select Cost Book (DefaultCostBookExtensionPoint): Change the selection logic for using the default cost book on a quote 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.

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- 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 Customer Relationship Management applications, such as the Opportunity, 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.

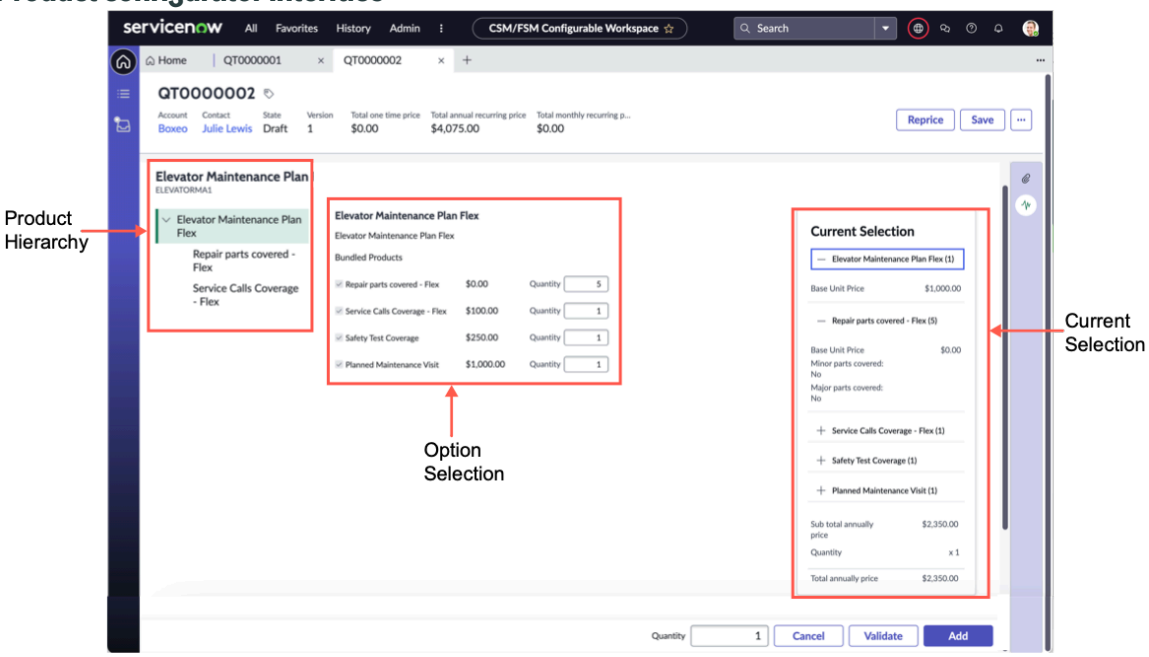
The interface consists of three main sections:

- **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 how to configure 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. As your agents use the interface, visual indicators, alert messages, and contextual information about their entries are also displayed to help agents complete the order. For more information on configuring these options, 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.

As an admin, you can use product configurator extension points and methods provided with the Open state management framework to customize the product configurator interface. To learn more about the framework, see Open state management.

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Product configurator interface



Lead Management

The Lead Management application enables your sales agents and sales development representatives to create leads and nurture them into opportunities.

In a sales cycle, prospective customers express their interest through various channels, such as website forms, social media, or events. With the information captured through these channels, the sales agent creates a lead. After a lead is created, it goes through multiple processes to get converted into an opportunity.

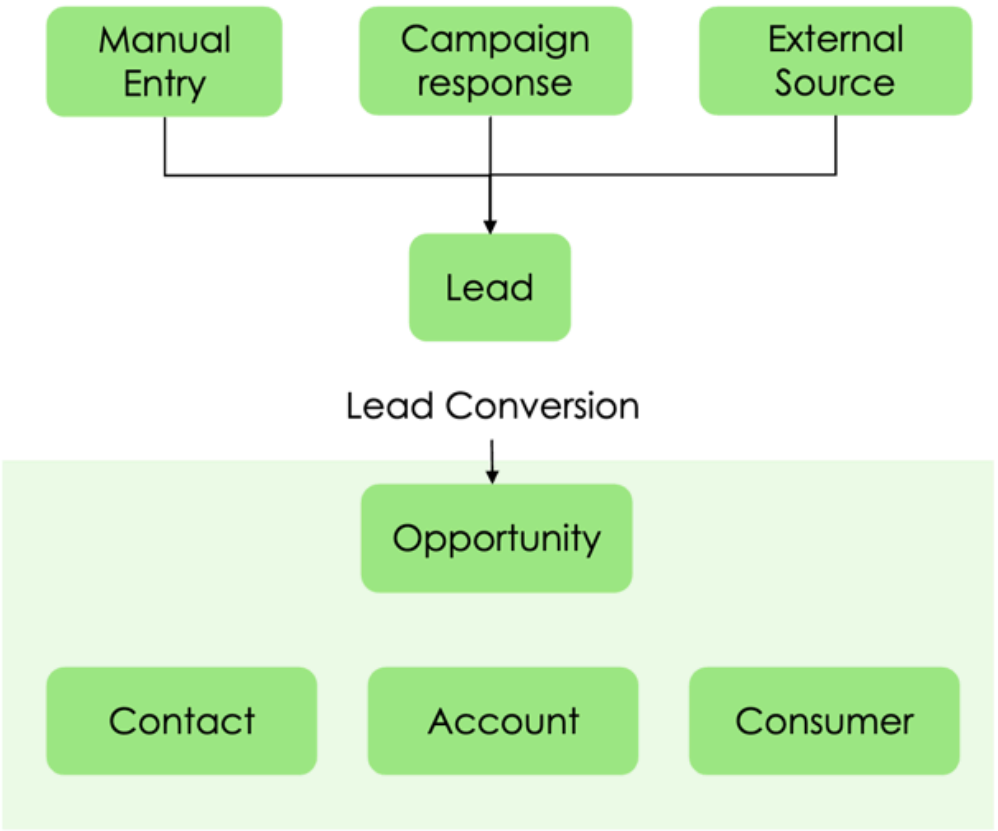
The processes include:

- Lead scoring: Prioritizing leads based on predefined criteria for more focused attention.
- Lead qualification: Determining if a lead meets certain criteria to be considered a sales-qualified lead.
- Lead assignment: Assigning leads to the correct sales development representative to follow up.
- Lead nurturing: Engaging with leads until they become sales-ready.
- Lead segmentation: Categorizing leads based on industry, behavior, or other parameters for targeted marketing.

As sales agents move through the lead workflow and recognize interest from customers in buying products, it becomes essential to qualify or convert the lead. This process includes linking the lead to specific accounts and establishing lead qualification, which ultimately generates product orders.

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Lead workflow in Sales Customer Relationship Management



What to do next

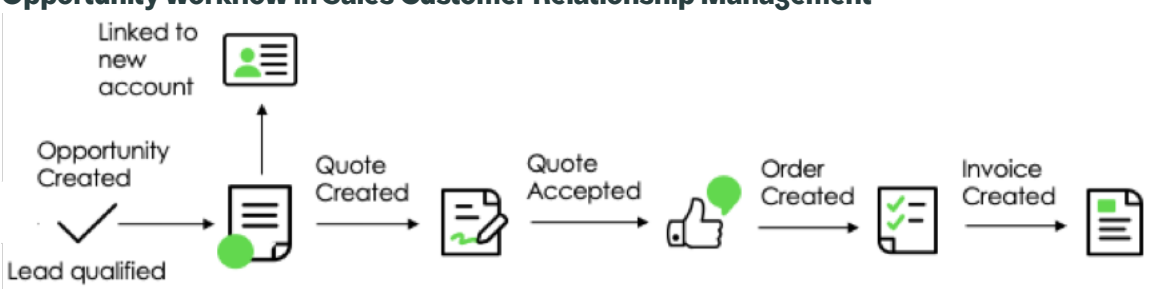
To learn about setting up Lead Management, see Install and configure Lead Management.

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 Customer Relationship 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 Customer Relationship Management



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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 offerings 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.
Team	Create opportunity team members. **Note:** Following member roles (Related party types) and responsibility are shipped by default: • Account Executive • Solution Sales Executive • Price Band Approver Additional roles can be configured; however, user access through these roles via the responsibility framework is supported starting from the Zurich Patch 3 release.
Contacts	Create opportunity associated contacts.
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 Add and view the details of an opportunity and Add line items to an opportunity.

Pricing in Opportunity Management provides the following benefits:

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- 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 to strategize 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.

Use the 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 opportunity lines.
- Select product options and view product relationships.

The product configurator uses Sales Customer Relationship Management primitives to create and update opportunity lines and characteristics.

What to do next

To learn about setting up Opportunity Management, see Install and configure Opportunity Management.

Sales Forecasting

Project your future sales and revenue based on data from opportunities, historical performance, and pipeline analysis using Sales Forecasting. With this application, sales managers can allocate resources effectively, receive constructive feedback, and forecast sales with precision to make informed decisions.

Sales representatives are directly involved in communicating with their managers about the sales opportunities that they are handling, offering insights into what they expect to close during the forecast period. Sales Forecasting uses the data from the opinions and insights of your sales representatives on how they feel about the deals in their pipeline. The longer a prospect progresses along the sales pipeline, the better their chances of converting.#For example, a prospect who just signed up for your product’s free trial is 20% more likely to convert into a paying customer. Whereas a prospect who attended the product demo is 80% likely to sign a contract.

Sales managers own the overall forecast for a group of sales representatives. Sales managers collect data from their team members and adjusting the forecasts based on these insights. They set sales targets and quotas for individual representatives and distribute targets.

Key Benefits

- Resource allocation:#Efficiently allocate budget and resources based on projected sales and revenue expectations.
- Budgeting and Financial Planning: Supports financial planning and budget creation by offering insights into anticipated revenue.

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- Sales Target Setting: Define sales targets and quotas for sales teams, territories, and individual sales representatives.
- Tracking Sales Targets: Track the sales and status of quota target achieved for your agents and team.

Sales Forecasting terminology

Use the following list of terms to gain an understanding of Sales Forecasting concepts, components, and configuration.

Forecast Model

The forecast Model is a framework or method used to predict future sales based on historical data, current sales activities, and other relevant factors. It helps businesses estimate the expected sales figures over a specific period, such as a quarter or year. Only one forecast model, Opportunity Amount Forecast is available to the users. You can view forecast the sales for the current opportunities in the system.

Forecast Category

The classification of opportunities is based on the level of certainty regarding their closure. The longer a sales prospect progresses along the sales pipeline, the better their chances of converting.#The forecast admin can configure these categories. By default, these six categories are available:

- Won:#Opportunities that have already been closed and won.
- Commit: Opportunities that sales reps are confident will close within the forecast period.
- Strong upside:#Opportunities with greatest potential to close but have some minor uncertainty.
- Upside:#Opportunities with potential to close but with lower level of certainty.
- Pipeline: Opportunities in the early stages of the sales process with uncertainty if they will be closed deals.
- Omitted:#Opportunities that are excluded from forecast due to lack of data.

Forecast rollup method

The forecast model defines how opportunities within different categories are aggregated into a forecast. There are two primary types of rollups: single and cumulative.

When you select Single, this rollup method ensures that each forecast category is represented in its own column, with only the opportunities in that category being included.

Single rollup method

Column Name on Forecast page	Opportunities that roll up to it from a forecast category
Pipeline	Pipeline
Upside	Upside
Strong Upside	Strong Upside
Commit	Commit
Won	Won

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When you select Cumulative, this rollup method aggregates forecast categories in a cumulative manner, where each subsequent category includes the opportunities from the previous categories. Each cumulative rollup method aggregates opportunities from higher order forecast categories.

Cumulative rollup method

Column Name on Forecast page	Opportunities that roll up to it from a forecast category
Open pipeline	Pipeline + Upside + Strong Upside + Commit + Won
Cumulative Upside	Upside + Strong Upside + Commit + Won
Cumulative Strong Upside	Strong Upside + Commit + Won
Cumulative Commit	Commit + Won
Won	Won

Forecast schedule

The forecast schedule fetches all the opportunities in the system and generates the latest forecast data.

Sales Quota Management

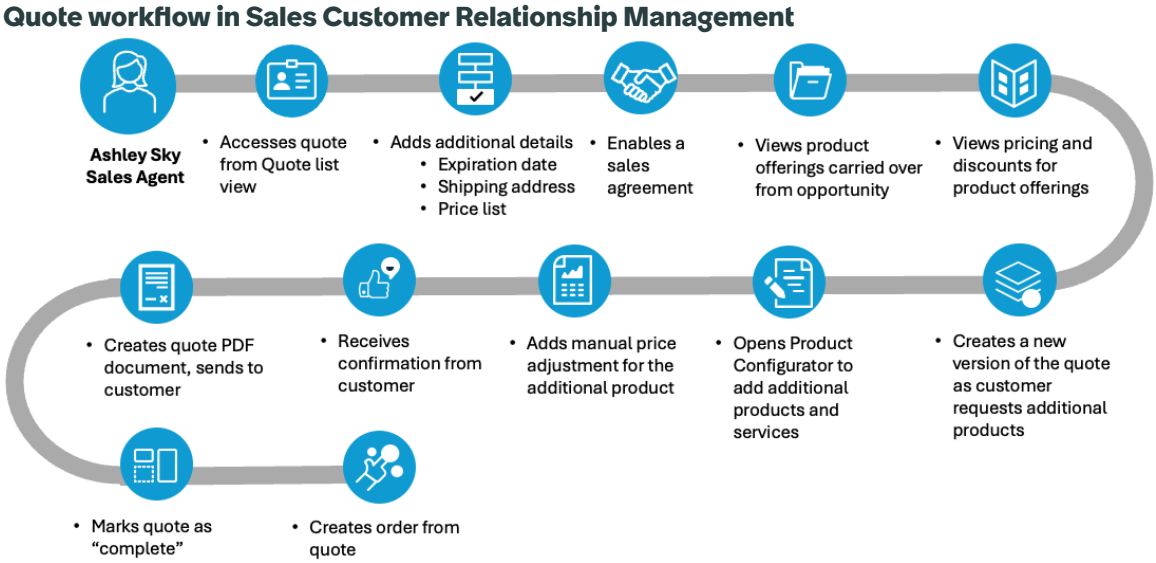
You can assign sales quota targets to sales representatives and managers based on their hierarchy, role, and forecast period.

Quote Management

Quote Management is an application used to create and manage product and service quotes. Quote Management can be a separate application or part of the Sales Customer Relationship Management (Sales CRM) 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 Customer Relationship Management, quotes can be created from the Opportunity Management application or quotes can be created separately, depending on your configuration.

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Quote Management user interface

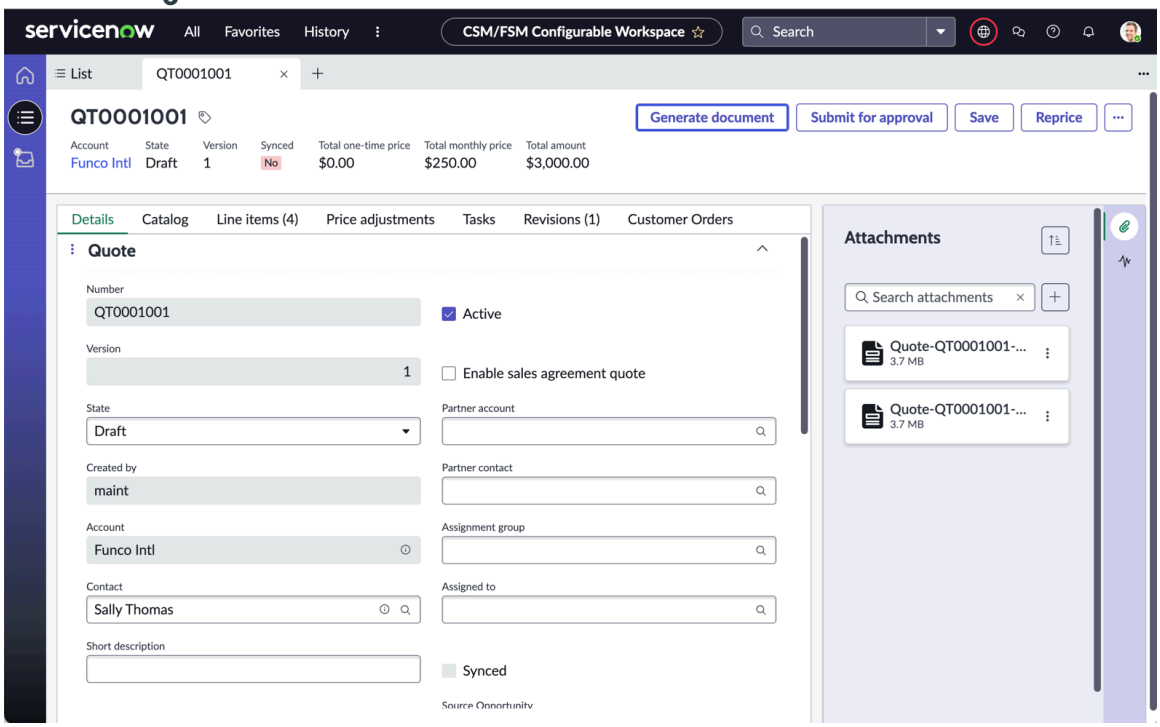
The Quote Management application is integrated with the product offering catalog and product configurator to help sales agents build quotes easily and conveniently. The Quote Management interface contains the following tabs:

Quote Management tabs

Quote window tabs or options	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.
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.
Using quotes to generate sales agreements	When the sales agreement is enabled or an existing sales agreement is selected, the quote workflow changes and enables agents to add products and services according to the sales agreement.
Create a quote PDF document	Sales agents can create a PDF document from a quote to send to customers for review and signatures.

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Quote Management Details tab



Integrate Quote Management 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.

Use the 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 Customer Relationship Management primitives to create and update quote lines and characteristics.

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.

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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.

Add 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.

Enable a sales agreement in Quote Management

Enabling a sales agreement in Quote Management changes the quote to a sales agreement workflow that sets the products and services according to the sales agreement. Agents can add simple products or configurable products including product bundles to a sales agreement.

- Configurable bundles with the ability to choose from all available child offers and optional products.
- Category level discounting
- Offer level discounting.

Add a sales agreement to a quote in Quote Management

Agents can either enable a sales agreement or apply an existing sales agreement as they begin to build the quote. Applying a sales agreement forces the quote to use the sales agreement including:

- Catalogs specified within the sales agreement
- Pricing controls stipulated in the sales agreements
- Customer information in the sales agreement

The system defaults sales agreement on the quote to the latest active sales agreement available for the customer. If no active agreement is found, the field is left blank. If the quote is for generating a new sales agreement, the user can check Enable sales agreement quote the sales agreement reference should be deleted and the field should be locked If the user unchecks the

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Enable sales agreement quote, the sales agreement reference field is unlocked and the user can select any available agreement.

To learn more about creating sales agreements, see Create a sales agreement.

See Apply a sales agreement to a quote in Quote Management to learn more about adding a sales agreement to a quote in Quote Management.

Set a location for product inventories

Use the location feature to set a location for products available in the product catalog.

- Select a location to add products and services to the quote line.
- Copy all products and services from one location to another.

Create PDF documents for a quote

Sales agents can create a PDF document for a quote that can be sent to customers for review and electronic signatures.

- Quote PDF documents can be linked to electronic signature apps like Docusign that enable customers to sign quotes electronically.
- Quote PDF document templates can be created that reflect customer branding and logos.
- Quotes PDF documents that can be sent to customers for review and approvals.

See Configuring quote PDF documents and Create a quote PDF document for more information about creating PDF documents for quotes.

What to do next

To learn about setting up Quote Management, see Install and configure Quote Management.

Quote Management integration with Contract Management Pro

The Quote Management integration with Contract Management Pro is known as Contract Management for Sales and Order Management (com.sn_som_clm).

Quote Management integrates with Contract Management Pro to help sales agents create legal sales contracts from a quote. A legal sales contract confirms the sales deal and agreements between your company and customer.

The following roles are required to initiate, view, and manage contract execution:

- Contract fulfiller: This role is assigned with the **Sales agent** role and it enables sales agents to create contracts and execute the contract workflow.
- Contract configurator: This role is assigned with **Sales Ops specialist** role and it enables sales ops specialists to configure data required for contract initiation and its related tasks.

A contract generation process consists of the following steps:

- A sales ops specialist creates a contract type and document template, defines signatory rules, and completes configurations for the contract generation process. To learn more, see Configuring Contract Management Pro.
- A sales agent then initiates the contract creation process through the Initiate contract UI action by filling the required details, such as Type of paper, Contract type, Signature type, and Start and End dates.

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  - **Inititate Contract** UI action is visible only when a quote is in Completed state.
  - After you submit the contract creation form, it creates a contract request record.
  - The new contract request triggers the workflow to generate the legal sales contract.

  To learn more, see Initiate a contract request.
- When the contract workflow is complete, the state of the contract request is changed to Closed complete.

What to do next

To learn more, see Integrate with Contract Management Pro.

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 Customer Relationship 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 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.

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Request apps on the Store

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

Order Management 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. For detailed benefits of the Service Exchange applications, see Learn about Service Exchange.

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

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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.

Business Portal for customer self-service

Business customers can use the Business Portal to do the following:

- Browse products using the product catalog.
- Configure product options for complex products.
- Create orders and view products in their shopping carts.
- Review the fulfillment process to check the progress of their orders.

For more information on setting up the Business Portal, see Configure the Business Portal.

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

In Order Management, a customer order moves through the various stages of an order's life cycle.

Order life cycle

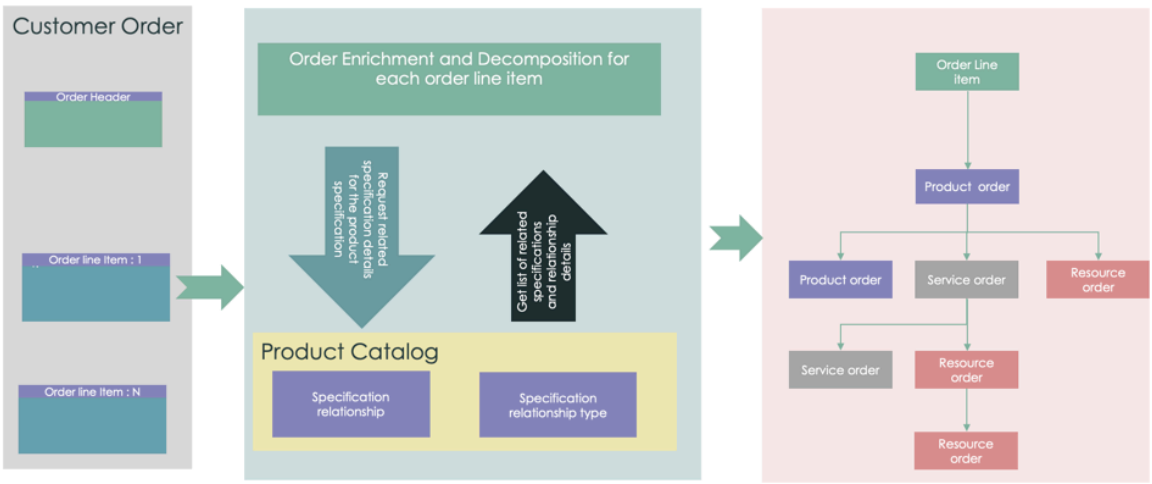
Stage	Description
Customer order	Main order entity that is captured and created for managing the end-to-end life cycle of a customer request for products or services.
Enrichment	Additional information that is required for the order decomposition and for the fulfillment process. Attributes and elements 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.

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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.

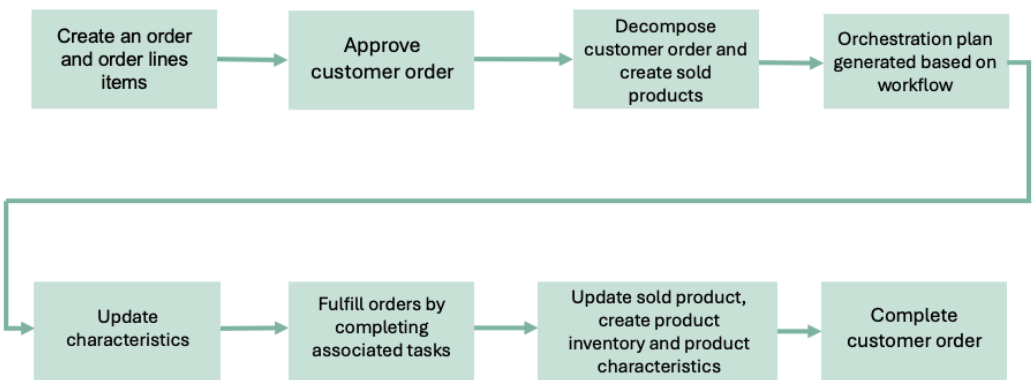
Order enrichment and decomposition process



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, disconnect, suspension, resume, or no-change of services.

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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 the 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 existing products.
Disconnect (delete for TMF API)	Disconnect an existing customer service order. For example, you can disconnect your home internet service. **Note:** When a mandatory product is deleted, all the products are deleted.
Suspend	Product or service order to temporarily inactivate 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 (such as the speed, which 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.

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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.

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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.

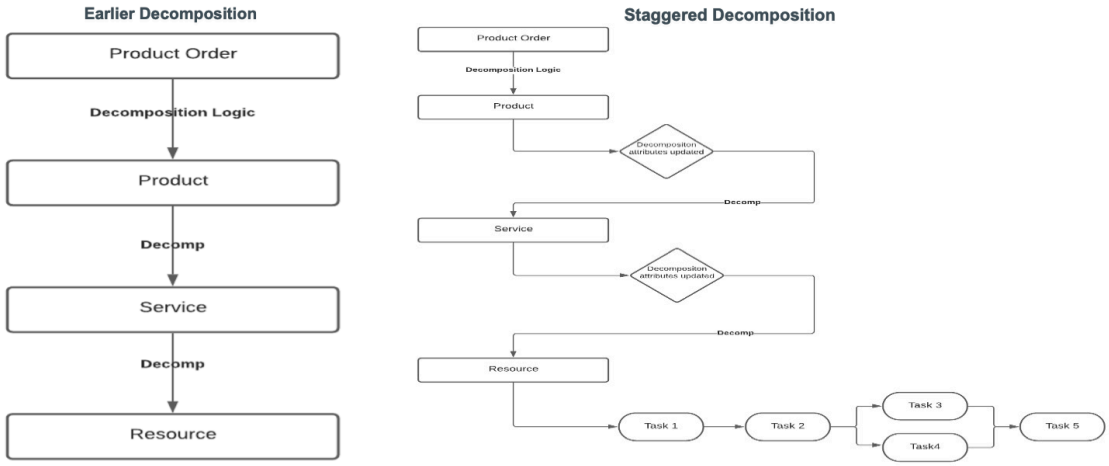
Staggered decomposition

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.

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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.

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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

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

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API-based workflow scenario for Order Management



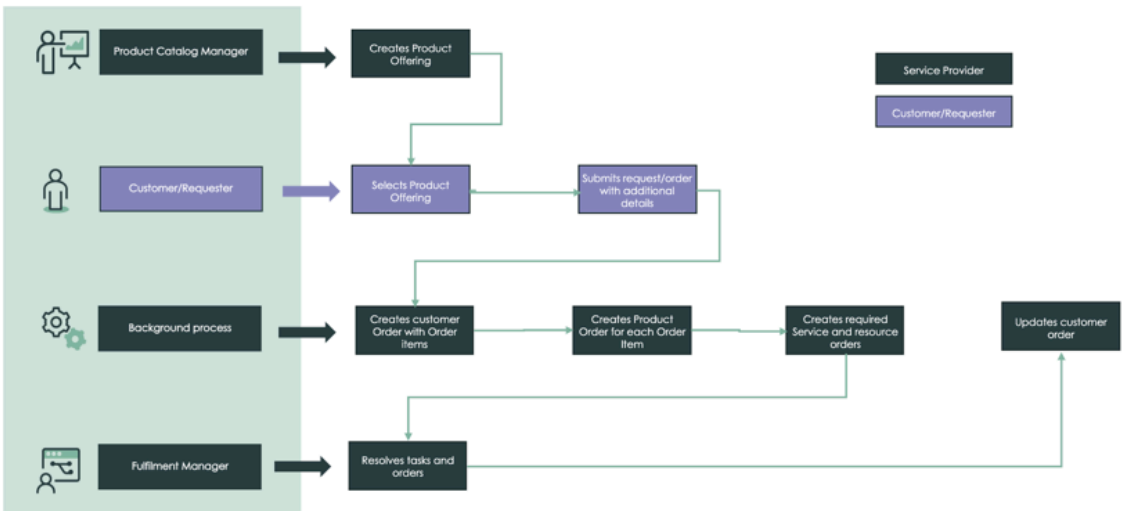
Scenario 2: Using Service Exchange for order capture and upload

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:
For detailed benefits on using the current Service Exchange applications, see Learn about Service Exchange.

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

Service Bridge workflow scenario for Order Management



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.

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Overview

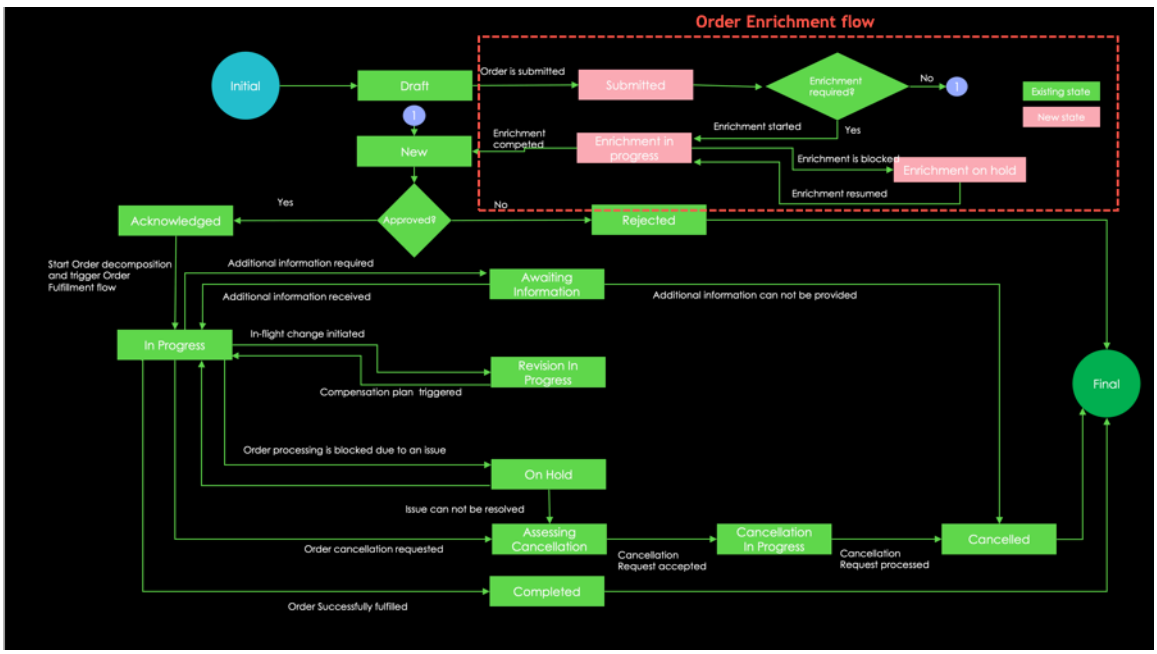
An order enrichment process is a set of tasks to capture additional order details by the order agent from your customer.

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

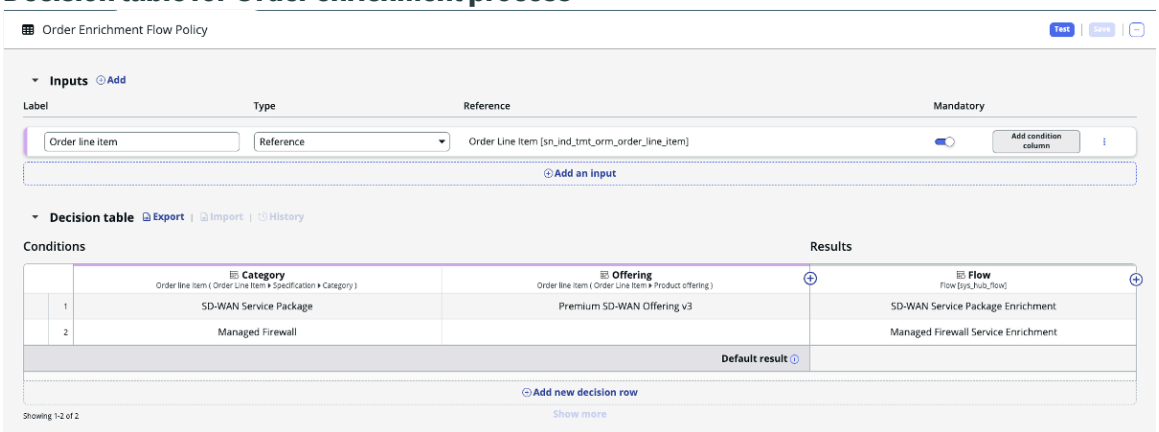
It isn't required to enrich all the orders. If it is a complex product or service order, the agent decides to enrich the order.

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



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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.

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.

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Order fallout table attributes (continued)

Field	Description
	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.
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: 

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Order fallout table attributes (continued)

Field	Description
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.

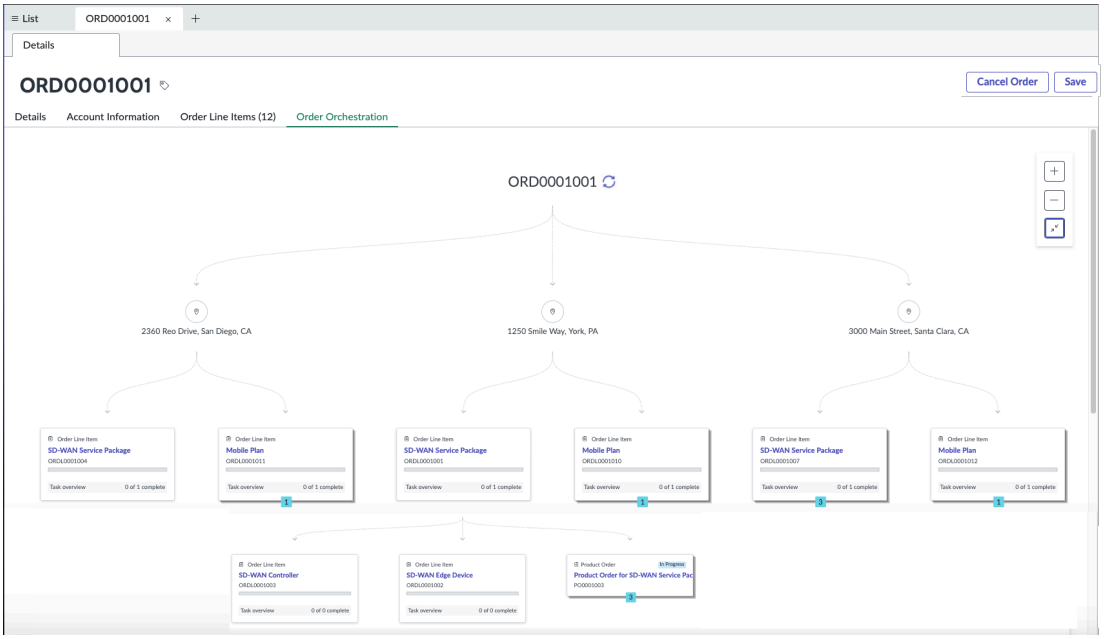
Using the Orchestration Plan UI

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:

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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

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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
-

Related topics

Managing order fallout

Jeopardy Management

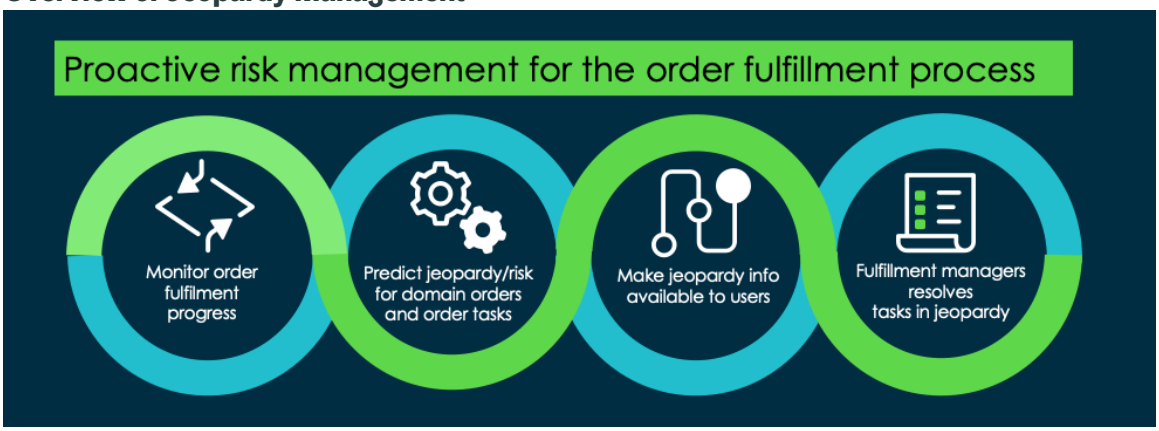
Jeopardy Management is a risk assessment tool that monitors fulfillment tasks, assesses the risk level, and alerts fulfillment managers when the assigned task time is in jeopardy.

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 identities any delays and shares alerts, which can be addressed by fulfillment managers.

Overview of Jeopardy Management

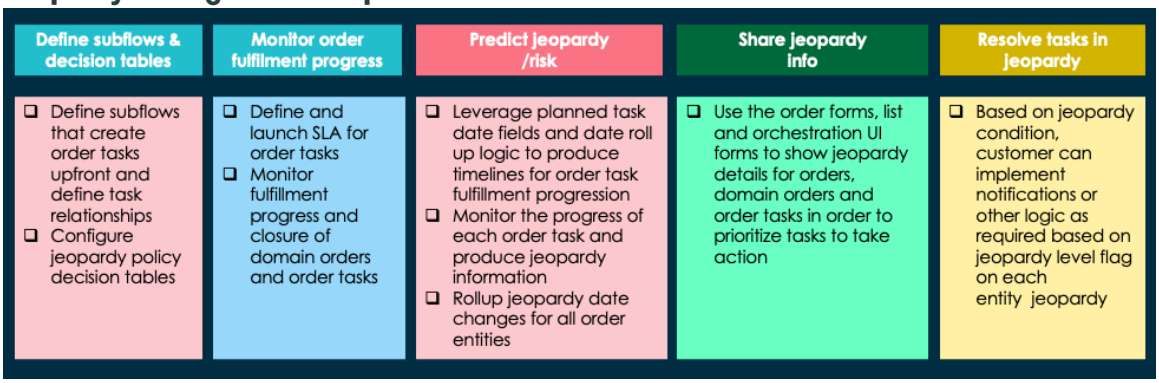


How Jeopardy Management works

Jeopardy Management works by tracking tasks in an order fulfillment process. Order 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.

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Jeopardy Management components

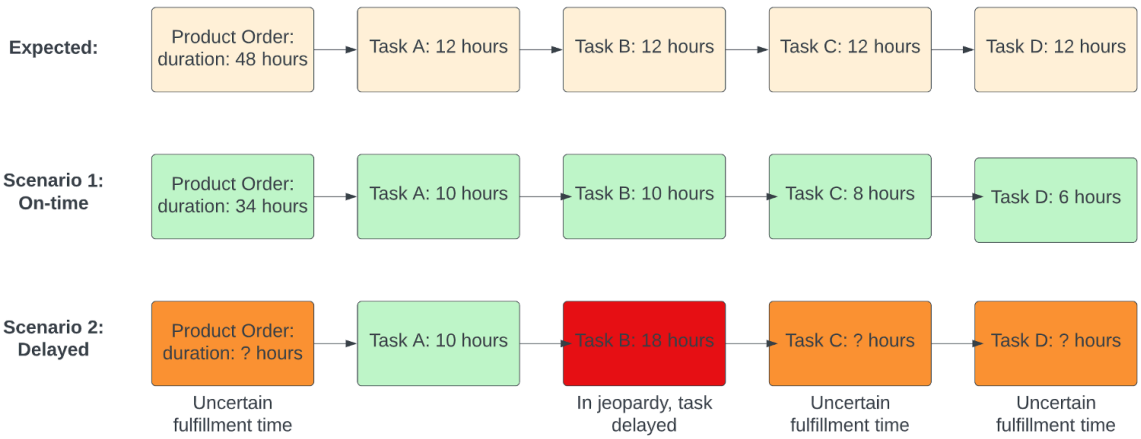


Jeopardy Management alert levels

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.

-
- 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:

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- 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 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.

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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 Workflow Studio 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.

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- 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 roles and personas 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_fulfilment_manager

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Personas and roles in Jeopardy Management (continued)

Persona	Responsibilities	Role
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_fulfilment_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
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

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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 application.

Overview of asynchronous order processing

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

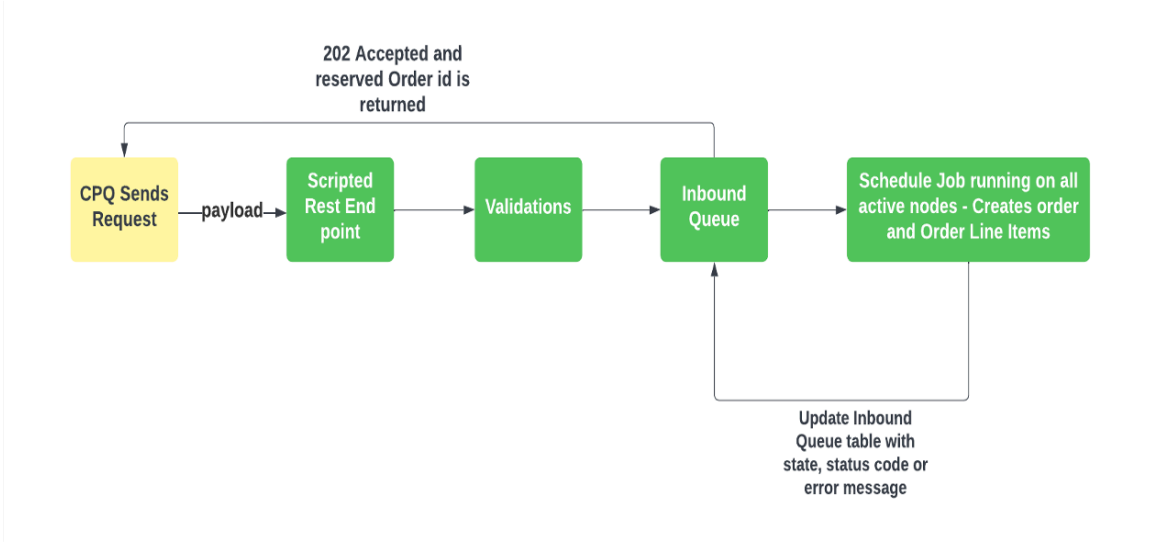
In asynchronous order processing, a high volume of orders or a large number of order payloads are received through the Product Order Open API (Scripted Rest End Point) in the Order Management application from the external Configure, Price, and Quote (CPQ) systems. The order details are first validated 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.

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Asynchronous order processing workflow

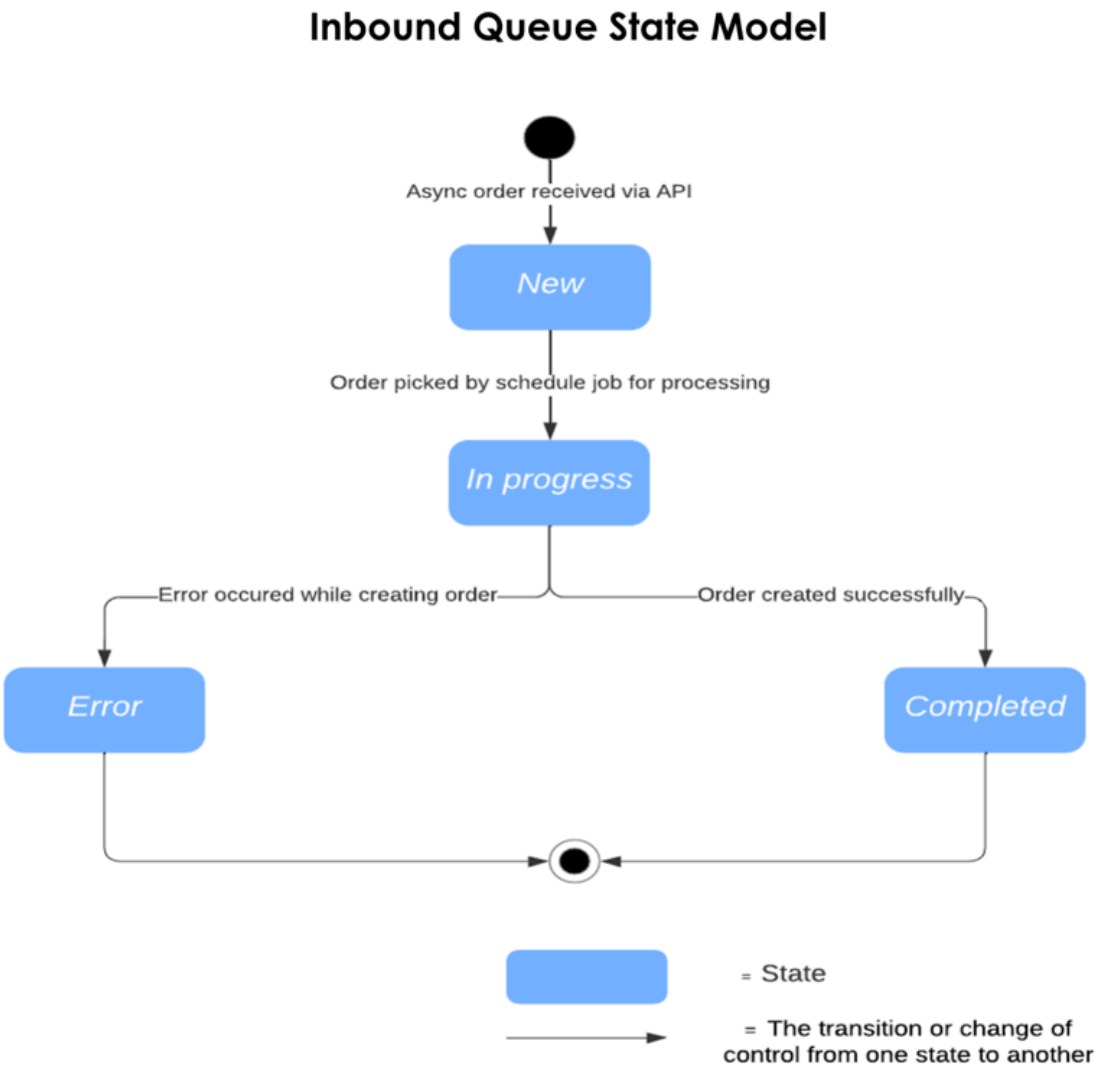


The asynchronous order processing follows these steps:

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.

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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 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.

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- 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 fulfilment process. The 5G slice ordering process follows the existing order approval, decomposition, and fulfilment process in the Order Management application.

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 of external product inventory ID

If you're using the Order Management 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 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

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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.

Lead-to-Cash Process Management

The ServiceNow® Lead-to-Cash Process Management application empowers sales teams by providing a consolidated view of all critical sales data and activities.

Lead-to-Cash Process Management overview

Lead-to-Cash Process Management is a centralized, real-time command center that aggregates information from various sources like Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) platforms into a dynamic dashboard.

Lead-to-Cash Process Management users

Users

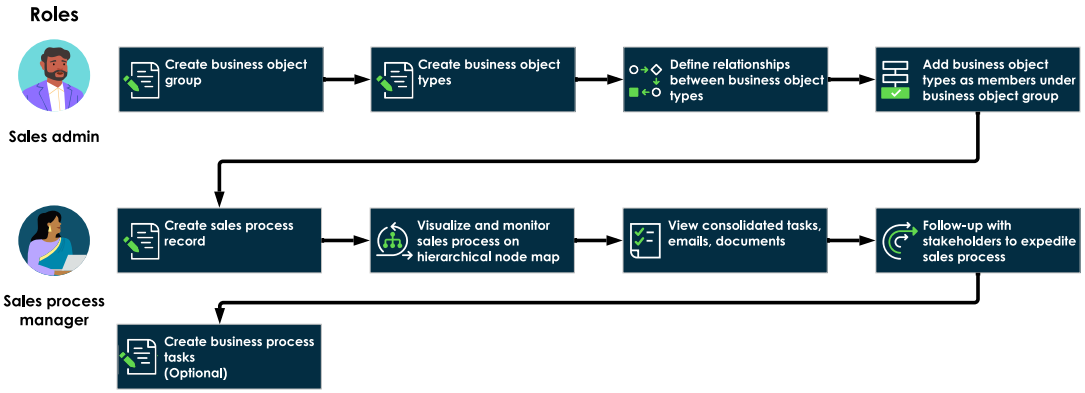
User	Description
Sales admin Contract admin	Define and create the sales process and relationships between the sales entities to be monitored using Lead-to-Cash Process Management.
Sales process manager	Create sales process records for an account and monitor, manage, and follow-up on tasks.

Lead-to-Cash Process Management workflow

The following illustration describes the tasks involved in configuring and using Lead-to-Cash Process Management to monitor the end-to-end sales process from a single interface.

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Lead-to-Cash Process Management workflow



1. Sales admins create a business object group in the Next Experience UI, is a logical entity that defines your business process and the entities involved. For example, order-to-cash.
2. Create business entities (business object type) you want to monitor in your sales process and define relationships between them.
3. Add the business entities as members of the business object group.
4. The sales process manager creates sales process records in the CSM Configurable Workspace.
5. Sales process managers create sales process records for monitoring a customer account. A dashboard is created that contains the hierarchical node map view of the opportunities, quotes, orders, and other related entities.
6. Manage tasks, status, documents, and emails related to the business entities, and follow up with respective teams to expedite the process.
7. Track other tasks at the sales process record level by creating business process records.

Lead-to-Cash Process Management benefits

Lead-to-Cash Process Management benefits

Benefit	Feature	Users
Create a hierarchical relationship between sales entities using built-in or custom business objects that mirror your organization's structure and strategic goals.	Create business objects and set up relationships between the entities	Sales admin
Customize the number of levels and tile content on the node map, enhancing clarity and control so that the sales process managers can focus on relevant data and navigate through complex sales processes effectively.	Customize the sales process dashboard	Sales admin
Select parent entities (such as Opportunity, Quote, or Order) and child entities (such as Quote lines or Order lines) to create a customized view of the sales life cycle that reflects the structure and needs of each account. This capability helps you track	Create account-specific sales process records	Sales process manager

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Lead-to-Cash Process Management benefits (continued)

Benefit	Feature	Users
only relevant records, reducing noise and improving focus.		
Gain end-to-end visibility of the defined sales process through a consolidated view that provides a real-time snapshot of opportunities, quotes, orders, and related entities. The ability to see an entity's details eliminates the need to toggle between systems.	Consolidated view and nodal hierarchy for monitoring a sales process	Sales process manager
Adjust which entities are actively tracked by linking and delinking records or changing how records are linked to focus on relevant sales activities.	Link and delink records	Sales process manager
Streamline communication, task management, and documentation, which accelerates decision-making and improves cross-functional alignment and collaboration without having to leave the workspace.	View consolidated emails and tasks, create checklists and attachments, and use integrated chat	Sales process manager

What to explore next

The following topics provide more information about configuring and using Lead-to-Cash Process Management:

- Configuring Lead-to-Cash Process Management
- Using Lead-to-Cash Process Management
- Lead-to-Cash Process Management reference

Customer Engagement Sequences

Customer Engagement Sequences is a playbook that consists of a series of automated and manual activities that can be set up to engage with leads and customers at every stage of their relationship with your business through various channels.

Customer Engagement Sequences overview

Use ServiceNow® Customer Engagement Sequences to provide structured plans to sales representatives for prospects, which helps ensure consistent messaging and effective objection-handling. Standardizing repetitive tasks means representatives can focus on high-value actions.

Customer Engagement Sequences users

Users

User	Description
Sequence admin, sequence writer (For example, Sales admin, Sales	Creates multi-step sequences using Workflow Studio and defines triggers (start conditions), activities (for example, call attempts), and exit conditions.

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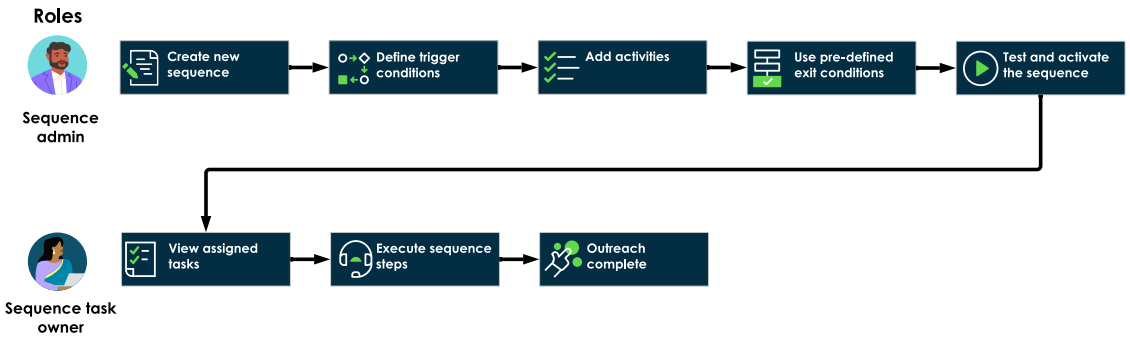
Users (continued)

User	Description
Development Manager (SDR))	
Sequence task owner (For example, Sales representative, customer success manager, telesales representative)	Views sequence tasks that are assigned to them and executes targeted outreach strategies, often using a combination of emails, phone calls, and social media, to engage prospects and move them through the initial stages of the sales funnel using the predefined sequence steps.

Customer Engagement Sequences workflow

The following illustration describes the tasks involved in configuring and using Customer Engagement Sequences.

Creating and using Customer Engagement Sequences



1. As a sequence admin, create a customer engagement sequence such as a lead-nurturing sequence from the CSM Configurable Workspace.
2. Define the sequence parameters:
   - Trigger conditions (for example, when a new lead is created)
   - Sequence steps (for example, call, follow-up, email)
   - Step frequency (for example, wait three days between steps)
   - Exit conditions (for example, lead conversion or disqualification)
3. Test and activate the sequence.
4. Every record that meets the trigger condition is added to the sequence, and a sequence task associated with the record is created. For example, when a new lead record is created in the system, the sequence is run, and it generates a sequence task.
5. As a sequence task owner, view the assigned sequence task and complete the series of predefined activities that are part of it. For example:

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- Day 1: Call the prospect
- Day 4: Make a follow-up call and use a questionnaire to gather more information

6. The sequence task moves to closed state when all sequence steps have been completed or the predefined exit condition is met.

Customer Engagement Sequences benefits

Customer Engagement Sequences benefits

Benefit	Feature	Users
• Configure sequences using Workflow Studio to reduce dependency on developers. • Provide a structured, multi-step plan to sales representatives for each prospect so they know exactly when to call, email, or send a social media message. • Personalize outreach by inserting a prospect's name, company, and other details. • Ensure consistent messaging and effective objection handling by providing teams with clearly defined steps that dynamically adapt to customer responses.	No-code interface to build customer engagement sequences	Sequence admin, sequence writer
• Boost productivity by minimizing repetitive tasks so sales representatives can focus on high-value activities. • Reduce the chance of missing a follow-up, ensure consistency in outreach, and minimize manual effort by following predefined steps. • Accelerate onboarding by enabling new sales representatives to adopt proven outreach strategies from existing sequences.	Predefined activities that align with business goals and outreach strategy	Sequence task owner

What to explore next

The following topics provide more information about configuring and using Customer Engagement Sequences:

- Configuring Customer Engagement Sequences
- Using Customer Engagement Sequences
- Components installed with Customer Engagement Sequences
- Exploring Workflow Studio

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Customer self-service for Sales Customer Relationship Management

Support your business-to-business customers by enabling self-service capabilities through the Business Portal to create and manage orders and submit order issues and requests.

Business Portal overview

The Business Portal is a self-service web portal that supports your business-to-business (B2B) customers by providing integrated access to knowledge articles, community forums, service catalogs, and chatbots. It's based on Customer Service Management (CSM) and built using configurable widgets.

B2B customers can perform the following order management tasks using the Business Portal:

- Browse products and create orders.
- Create and view cases for their orders.
- View order and order case details, such as the order status.
- View and track the list of product inventories associated with your account.
- Manage products or services using service catalogs.

Key benefits

- Make order management features that your sales agents use available directly to your B2B customers
- Reduce customer dependency on customer service agents for routine order inquiries and for raising order issues such as quantity or address disputes
- Improve issue resolution time and customer satisfaction
- Preserve items and configurations added to the cart
- Add order instructions while placing an order
- Download cart summary in PDF format for stakeholder review
- Review terms and conditions, specify shipping and billing addresses before placing an order

Business Portal users

Users

User	Description
Admin	Manages and administers the Business Portal, installs new plugins to enable new features.
Customers	B2B customers browse products catalog, order products, create, order cases to request changes to orders and order line items, view order case details.

What to explore next

The following topics provide more information about configuring and using the Business Portal:

- Getting started with the Business Portal: Configure Business Portal
- Using the Business Portal (All features and capabilities)

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- Configuring the Business Portal
- Customer self-service using the Business Portal
- Business Portal user roles

Partner Relationship Management

Learn how the Partner Relationship Management application enables enterprises to hire and engage channel partners to sell their products and services to grow and improve their business.

Overview of Partner Relationship Management

Channel partners streamline and help manage the sales process of a product or a service for an enterprise. The PRM solution offers tools to manage the end-to-end partner life cycle.

PRM enables an efficient and continuous partner engagement and collaboration system with the enterprise to provide essential support. The PRM system enables partner onboarding, life cycle management, and improves the overall collaboration between channel partners and enterprises. To learn how to configure Partner Relationship Management, see Configure Partner Relationship Management.

The collaboration improves case management solutions and enables partners to log in to the Partner Portal to raise concerns or queries and communicate directly with the enterprise. This provides better resolutions leading to improved enterprise and partner collaboration.

In the partner ecosystem, channel partners such as resellers and system integrators are critical to expanding an enterprise's reach and drive customer success. Channel partners often must raise operations, sales, and service related issues directly with the enterprise. However, without a structured servicing and collaboration system, partners experience delays, inefficiencies, and friction that impact both partner satisfaction and business outcomes. The PRM solution can build a bridge between the channel partners and enterprises.

Use case

ABC systems, a global technology reseller and implementation channel partner for XYZ solutions (enterprise), operates across North America with hundreds of active customer engagements. ABC's consulting and delivery teams frequently encounter challenges requiring direct support from XYZ, such as clarification on licensing models or product configurations. With the Partner Relationship Management solution, ABC no longer needs to rely on adhoc emails, informal escalation channels, or multiple sessions leading to delays.

With the Partner Relationship Management solution, the channel partner ABC can do the following.

- Submit and manage support cases through the Partner portal designed for easy access and case tracking.
- Benefit from a role-based experience where channel partner managers and associates can independently raise cases and monitor the status without dependency on enterprise contacts.
- Gain visibility into program participation and support activities through personalized dashboards.
- Use the unified partner data model to confirm that entitlements and participation in XYZ's partner programs are accurately tracked and easily accessible.

With the Partner Relationship Management solution, the enterprise XYZ can do the following.

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- View and fulfill cases raised by the channel partner ABC in a centralized workspace.
- Route assignments to the appropriate support agents.
- Track channel partner engagement levels within ABC via real-time dashboards.

By streamlining support and collaboration through PRM, ABC reduces its resolution time, improves internal efficiency, and strengthens its partnership with XYZ.

Key benefits of PRM

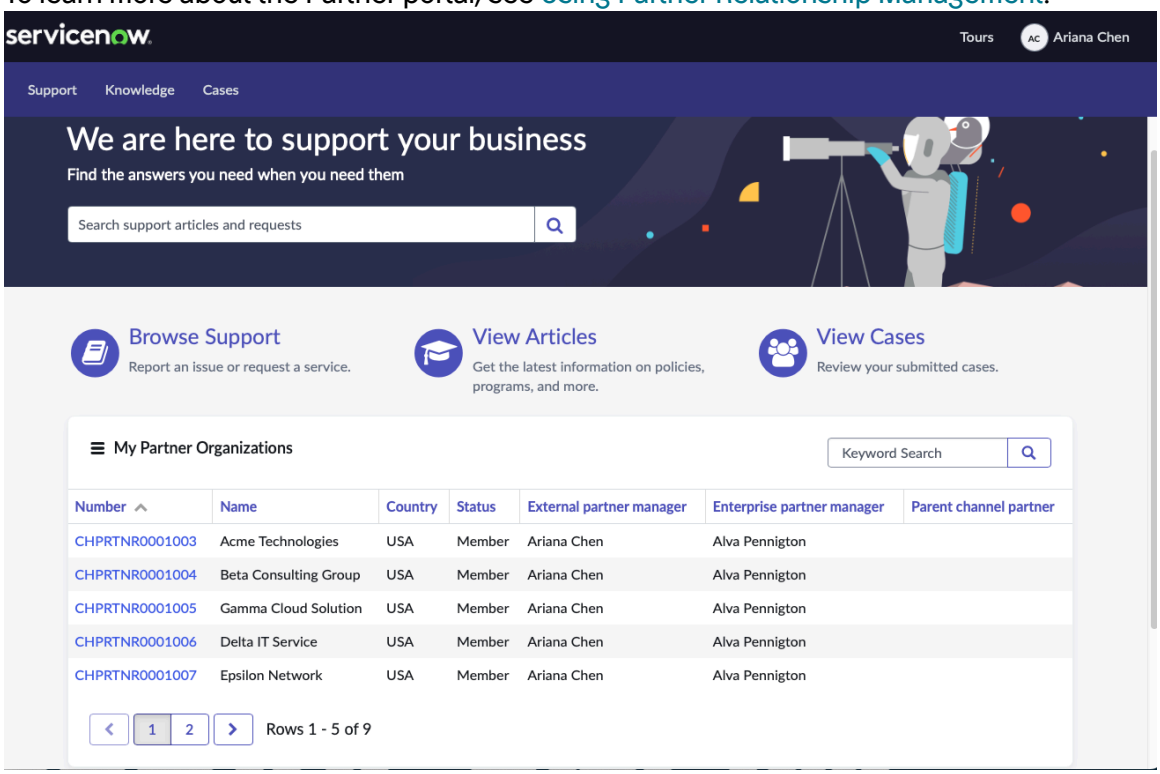
The Partner Relationship Management solution offers the following benefits.

- Enhances partner experience- Support partner onboarding and life cycle management to provide an improved interaction system between channel partners and enterprises. This increases partner satisfaction and reduces onboarding time.
- Increase sales and revenue- Streamline and improve collaboration between enterprises and their partners to increase partner sales and performance to enable higher partner-initiated revenue and efficient deal conversion rates.
- Increase operational efficiency- Provide visibility into the partner ecosystem and enable partners to achieve their business goal to decrease manual intervention and increase partner self-service.

Partner Portal

The Partner portal enables channel partners to create cases, register external members as staff, and view knowledge articles.

To learn more about the Partner portal, see Using Partner Relationship Management.



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Related topics

- Configure Partner Relationship Management
- Using Partner Relationship Management
- Partner Relationship Management reference

Return Merchandise Authorization

Return Merchandise Authorization (RMA) enables the return, replacement, and repair for install base items. It offers simplified processes, decreased turnaround time, and a unified workflow.

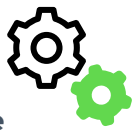
The RMA Case Management application includes the RMA case type. This case type provides the ability to reference multiple install base items as case line items on an RMA case record.

Using case line items, multiple issues can be tracked for the same RMA case. Also, the issues can be resolved in each case line item independently before resolving and closing the RMA case.

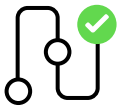
Configuring Sales Customer Relationship Management applications

Set up the Sales Customer Relationship Management (Sales CRM) 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.

As a user with the admin role, complete the following main configuration tasks to set up your applications. Select a tile to learn about how to install and configure a set of Sales CRM applications to implement and support pre-sales, sales, and post-sales workflows in your organization.

Lead-to-cash foundation  Set up core apps that enable your lead-to-cash processes.	**Configure, price, quote**  Set up tools to configure products and manage pricing, quotes, and sales agreements.	**Lead and opportunity management**  Set up tools to capture leads, engage customers, manage opportunities, forecast sales, and define sales territories.

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Order management  Set up tools to manage order creation and fulfillment, manage jeopardy, and resolve fallout issues.	**Order operations**  Set up workflows to manage end-to-end lead-to-cash processes and handle product returns.	**Post-sales engagement**  Set up tools to manage customer contracts, entitlements, and life cycle workflows on sold products.
Partner Relationship Management  Set up tools to onboard partners, manage relationships, and enable collaboration.	**Business Portal**  Set up a self-service portal for B2B customers to place orders, submit RFQs, view quotes, and raise order cases.	

Additional configuration tasks

- Assign user roles in Sales Customer Relationship Management applications

  Review and assign roles to users of the Sales CRM applications that you install.

- Configuring agent tools in Sales Customer Relationship Management

  The applications in Sales Customer Relationship Management share common features and tools for agents, such as location-based transactions.

Install and configure Lead Management

Install the Lead Management application, which enables sales agents and sales development representatives to create leads and provide pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis and kanban view used in Lead Management.

Admins and users with various roles, such as application admins and sales operation specialists, complete the following configuration tasks to set up Lead Management.

Configuration tasks for Lead Management

Task	Description	Role
Install Lead Management	Install Lead Management from the ServiceNow® Store Store.	Admin

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Configuration tasks for Lead Management (continued)

Task	Description	Role
Assign user roles in Sales Customer Relationship Management applications	Assign the user roles for Lead 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 needs analysis	Create the needs templates for questionnaires that sales agents complete to get product recommendations for leads.	Product catalog admin

Install Lead Management

If you have the admin role, you can install the Lead 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

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Lead 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.

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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 Lead Management.

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

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.

Admins and users with various roles, such as application admins and sales operation specialists, 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 Store.	Admin
Assign user roles in Sales Customer Relationship 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 for questionnaires that sales agents complete to get product recommendations for sales opportunities.	Product catalog admin
Configure location-based transactions	Activate the system property for location-based transactions and set up the rule entity and product eligibility decision rules.	Admin and product catalog admin

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Configuration tasks for Opportunity Management (continued)

Task	Description	Role
Create opportunity stages	Create sales cycle stages for an opportunity.	Opportunity setup writer
Create a sales cycle for an opportunity	Create a sales cycle type for an opportunity.	Opportunity setup writer
Associate a sales cycle with the opportunity stage	Link one or multiple opportunity stages with a sales cycle.	Opportunity setup writer

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.

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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: sn_opty_mgmt_core.opportunity_setup_writer

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.
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: sn_opty_mgmt_core.opportunity_setup_writer

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.

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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 check box 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: sn_opty_mgmt_core.opportunity_setup_writer

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.

Revise existing opportunities after an upgrade

Run a scheduled job to modify older opportunities so they can support parent-child opportunity line items.

Before you begin
Role required: admin

About this task
The scheduled job helps update opportunity lines on the opportunities created on or before the Yokohama Q1 release. From Yokohama Q2 release onward, the opportunity lines follow a hierarchical parent-child structure. The hierarchy is achieved by adding new fields on an opportunity line and affects the pricing functionality. For the existing lines to incorporate the updated pricing functionality, the newly added fields must be populated and the hierarchical structure must be in place.

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. On the scheduled job menu, search for the **Revise existing Opportunities on upgrade** job.

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3. Open the job and select **Execute Now**.
4. Navigate to **All** > **System Logs** > **System Log** > **All**.
5. Confirm that the job has been completed by checking for the `Opportunity Upgrade Job completed` message.
   The log lists the total number of records processed, along with their success and failure count.

> **Note:**
> If the job is abruptly stopped, the log displays `Opportunity Upgrade Job encountered errors` in addition to the error message.

Result
The scheduled job updates the open opportunities (not in any of the closed stages). The job works differently for opportunities that are synced to Quote than the ones that aren't.

Example:
For open, non-synced opportunities:

- The scheduled job updates the newly added **Top Opportunity Line Item** and **Product Specification** fields for all the opportunity lines.
- If a complex product offering has a child offering, the job creates child opportunity lines under the parent line. Newly created child lines contain correct values populated for the newly added fields.
- A subsequent pricing call is made to populate pricing fields for all the lines in the hierarchy.

For open, synced opportunities:

1. A scheduled job updates the newly added **Top Opportunity Line Item** field for all the opportunity lines.
2. The **Product Specification** field, new hierarchy, and pricing fields for this line are updated only if any change is done on the corresponding synced quote line.

> **Note:**
> After upgrading to the Yokohama Q2 release, run the scheduled job before working with Opportunity . Failure to do so results in inconsistent behavior in Opportunity and the related tables.

Configure Sales Forecasting

Use the Sales Forecasting application to project your future sales volumes and revenue based data from opportunities and pipeline analysis.

Activate Sales Forecasting

As an admin, you can activate the following plugins to enable users to access Sales Forecasting. For more information, see Activate a plugin.

Sales Forecasting plugins

Plugin	Description	Dependency
com.snc_sales_forecasting	Project your future sales volumes and revenue based on data from opportunities and pipeline analysis.	• com.snc_app-l2c-core • com.snc_app-prd-pm

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Sales Forecasting plugins (continued)

Plugin	Description	Dependency
		• com.snc_app_l2c_oppty_mgmt • com.snc_app-tmt-core
com.sn_sales_quota_application	Assign the quota targets to the sales reps in the sales team hierarchy.	com.snc_app_l2c_oppty_mgmt

You need the Sales Quota Application plugin to assign the quota targets to each team and sales agent. You can view and track the targets achieved for each agent and team on the sales forecasting dashboard and the gap remaining to achieving the target.

Roles in Sales Forecasting

Role	ID	Functions
Forecast Administrator	sn_sales_forecast.forecast_admin	• Setup group hierarchy and sales teams with the managers and sales agents' information for the organization. • Set up Sales forecasting settings and be able to initiate calculate forecasts. • Create/edit/view forecast category choices and forecast model details.
Forecast Contributor	sn_sales_forecast.forecast_contributor	View forecast item entries for the owner and the people under their hierarchy only.
Forecast Analyst	sn_sales_forecast.forecast_analyst	View all forecasts item entries, forecast category, forecast model and associated opportunities.
Sales Quota Admin	sn_quota_core.quota_admin	Create/import/edit/delete quota for different sales teams and individuals.
Sales Quota Manager	sn_quota_core.quota_manager	Edit the sales quota for the groups.
Sales Quota Owner	sn_quota_core.quota_owner	View the Sales quota#assigned to the owner.

Set up a sales team for forecast hierarchy

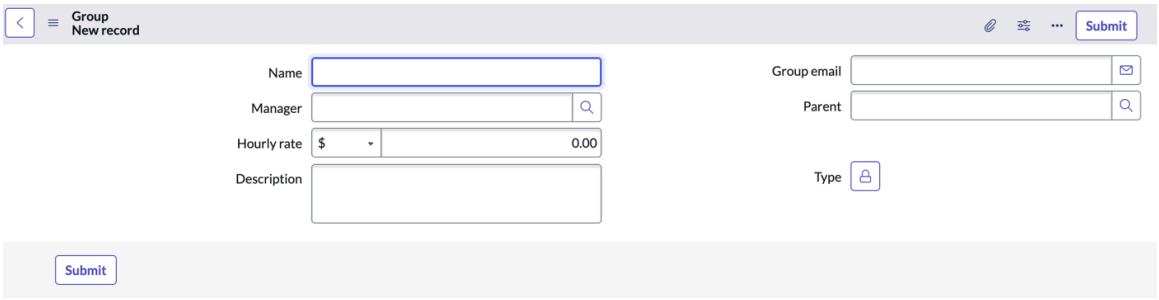
The system administrator can create groups, sales teams, associating them with specific managers. The sales hierarchy determines how the forecast rolls up within your company and how it can be viewed.

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Before you begin
Role required: admin

About this task
Once the users, teams, and opportunity data are added, along with selection of category, you can view the sales forecast for any group or specific sales team on the Sales Forecast dashboard on the CSM workspace.

Procedure
1. Navigate to **All** > **System Security** > **Groups**.
2. Select **New**.



3. On the form, fill in the fields.

Field	Description
Name	Name of the team that will be visible on the Sales Forecast dashboard.
Group email	Email ID of the team.
Manager	Name of the manager of the group.
Parent	Parent group of the team for which you want to forecast.
Description	Short description about the team and its sales activities.
Type	Select Sales Team only.

4. Select **Submit**.
   The new team is created and added on the Groups page.

Configure Forecast Categories

Configure the forecast categories in CSM configurable workspace.

Before you begin
For current opportunities in the system, the default value of the field Forecast Category is Pipeline. Every sales agent working on that opportunity, updates this field once the sales process starts. When the agents update the category, the dashboard reflects more accurate analysis and sales forecast prediction. These categories classify the sales based on the level of certainty regarding their closure. By default, six forecast categories are available. For more info, refer Forecast terminologies topic.

Role required: admin

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Procedure

1. Navigate to **All** > **Sales Forecast** > **Forecast Categories**.
2. Select#**New**.
3. On the form, fill in the fields:

Fields	Description
Name	Name of the forecast category that you want to create.
Description	Short description of the category.
Active	Select the Active check box to activate the forecast category.
Order	Select the order number in the current category cycle.
Type	From the list, select the type of category this new forecast category belongs to.

4. Select **Submit**.
   The new category is created.

Result

If required, users can either delete or make a forecast category inactive. When a category becomes inactive, the forecast items in that category will be deleted automatically.

Set up forecast schedule

Forecast schedule automatically fetches all the opportunities in the system and generates forecast data.

Before you begin

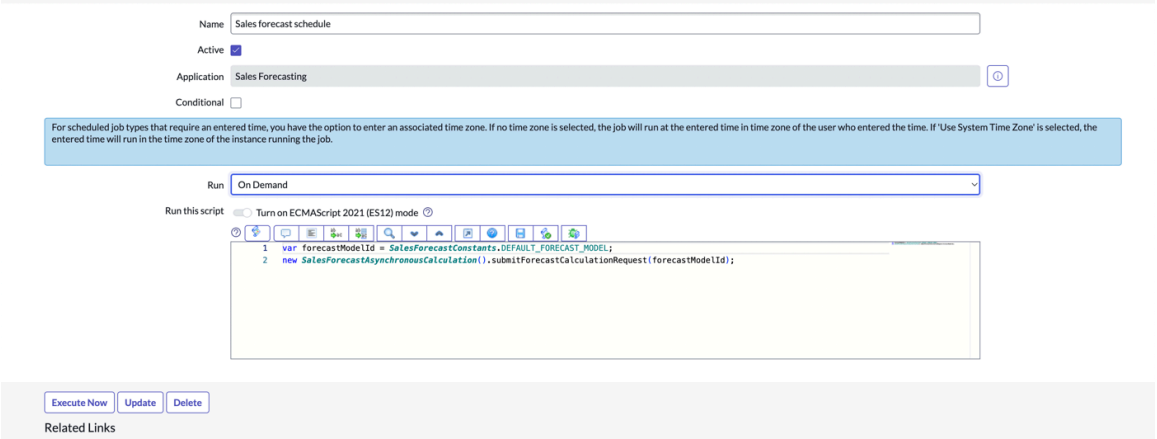
Create a scheduled job to update or create the forecast data at a specific time or recurring schedule. A default sales forecast scheduler is available with the Sales Forecasting application. You can edit that scheduler according to your requirements.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Job**.
2. Enter **Sales forecast schedule** in the Search field.
3. Select **Sales forecast schedule** from the schedule list.
4. From the Run list, select the option to customize the timing of the scheduler according to your requirements.

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5. Select **Update** to save the settings of your scheduler.
6. Select **Execute Now** to run the scheduler.

Note:

You can copy the script provided in the Run this script field to create your own scheduler.

Set up sales quota

Assign quota targets to sales representatives and managers based on their hierarchy, role, and forecast period.

Before you begin

Sales agents and managers can set the quotas/targets for a specific period and distribute. The quota can be assigned to a sales group as well. Quotas can be imported from external sources or entered manually in the system. Bulk import can be done by system administrator only.

Role required: sn_quota_core.quota_admin

Procedure

1. Navigate to **All** > **#Sales Quota Management** > **#Sales Quota**.
2. Select **New**.
3. On the form, fill in the fields.

Fields	Description
Owner	Name of the owner of the team the quota has been assigned to.
External ID	ID of the owner of external source from which the quota is imported from.
Sales team	Reference field to User Group in which the quota is assigned for.
External Source	Name of the external source in which the quota is imported from.
Period	Select a specific time period to assign this quota.
Amount	Select the currency and the amount of money to assign as quota to a team or an individual.

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Fields	Description
Type	Indicates if the quota is owned by an individual or at the roll up level.
Forecast Model	Select the forecast model. **Note:** By default, Opportunity Amount Forecast is available to the users.
Active	Select the **Active** check box to activate this quota.

4. Select **Submit**.
   The sales quota has been assigned to sales team.

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 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 Customer Relationship 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

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Configuration tasks for Quote Management (continued)

Task	Description	Role
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. • If you're using cost books, create the cost books that define the unit costs for product offerings.	Pricing admin
Activate cost books and cost margins	Use the *sn_quote_mgmt_core.enable_cost_margin_calculation* 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
Activate location-based transactions	Use the *sn_sales_common.enable_location_based_transactions* system property to activate location-based transactions in Quote Management.	Admin
Configuring quote PDF documents	Set up PDF template, signers, and Docusign. • Create PDF templates • Configure DocuSign • Set up PDF document signers	sales_operations_specialists

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.

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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

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. 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.

Integrate with Contract Management Pro

With the integration of Quote Management and Contract Management Pro, sales agents can initiate contract requests while finalizing a deal and formalizing agreements between you and your customers.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Contract Management for Sales and Order Management (Quote Management with Contract Management Pro) plugin (com.sn_som_clm).

Note:
To activate this plugin, there's a dependency on the Contracts core plugin (com.sn_cm_core). Verify that it's installed to use the contract creation workflow from a quote.

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3. Select **Activate**.
4. Complete the initial configuration steps to set up this integration.
   For more information on setting up Contract Management Pro, see Configuring Contract Management Pro.

What to do next
To learn more, see Configuring Contract Management Pro and Initiate a contract request.

Configuring quote PDF documents

As a sales operation specialist, you can generate professional-looking PDF templates that present quotes in a standardized format that reflects company branding and logos. You can also set up Docusign to enable signers to sign quotes electronically and send them through email.

Create quote PDF document templates

Add customized templates to quote PDF documents using the ServiceNow document template function.

A standard template is included with the base installation of Quote Management.

See Set up PDF document templates to learn more about PDF document templates and how they work.

Link quote PDF documents to Docusign

Sales operation specialists can link quote PDF documents to Docusign so that signers can sign PDF documents electronically.

See Configure DocuSign for PDF documents for more information about how to set up Docusign.

Set up quote PDF document signers
Sales operation specialist can set up PDF document signers in Quote Management. Signers can be emailed PDF documents for review and electronic signatures. There are two types of signers, external and internal signers.

- Contacts listed in an account linked to the quote can be external signers.
- Internal signers are all the users that have either sales_agent or sales_ops_specialist roles in Quote Management.

See Set up PDF document signers for more information.

Set up PDF document templates

Sales operation specialists can set up templates for PDF documents in Quote Management.

Before you begin
Role required: sales_operation_specialist

Procedure

1. Navigate to **All** > **Quote** > **Quote templates**.
2. Select **New**.
3. Choose **HTML template**.
4. Use the following links to build customer PDF templates:

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Links to create PDF templates

Link	Description
Document Templates	Explanation of document templates and how the work in ServiceNow.
Configuring Document Templates	Steps to configure documents templates.
Reference for Document Templates	Additional information about document templates.
Using Document Templates	How to use document templates.

Configure DocuSign for PDF documents

Quote operations specialists can configure PDF documents to work with Docusign to enable customers to sign PDF documents electronically.

Role required: quote_operations_specialist

Link quote PDF documents to Docusign

Sales operation specialists can link quote PDF documents to Docusign so that signers can sign documents electronically. The following links explain how to link PDF documents to Docusign:

- Docusign eSignature Spoke
- Set up Docusign eSignature spoke using authorization code grant
- Set up Docusign eSignature spoke using JWT grant
- Create child aliases for additional Docusign accounts
- Set up a bi-directional webhook for the Docusign eSignature spoke
- Synchronize Docusign with ServiceNow
- Activate catalog items
- Change the Docusign API version
- How to automate signing requests using templates
- How to automate signing requests using templates
- How to separate Docusign account data

Set up PDF document signers

Sales operations specialists can set up signers in Quote Management so that PDF quotes can be sent to either internal and external signers for review and signatures.

Before you begin

Role required: sales_operations_specialists

About this task

Contacts listed in the account for a quote can be external signers. The email listed with the contact is used to send the PDF.

Internal signers are all the users that have either sales_agent or sales_ops_specialist roles.

To assign roles for internal users, see Assign user roles in Sales Customer Relationship Management applications.

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Procedure

1. Navigate to **All** > **Customer Service** > **Accounts** and select **New** to create an account or select an existing account to add contacts.
2. For a new account, fill in the account information and select **Save**.
3. Add a contact to an existing account by selecting the account and opening the **Contact** tab.
4. Select **New**.
5. Fill in the information for the new contact.
6. Select **Save**.
   When the quote is created and the account selected, the contacts in the account are available as signers for the PDF documents. The email associated with the contact is used to send the PDF document.

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 Management 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] • Quote Management Application [com.sn_l2c_quote_mgmt] **Note:** You need to install the Quote Management Application plugin separately.

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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

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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.

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

Install Order Management

You can install the Order Management application (sn_ind_tmt_orm) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Order Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with 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.

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

- Order Management (sn_ind_tmt_orm): Select this app to install the Order Management application.
- Order Management for Telecommunications, Media, and Technology (sn_om_tmt): Select this app if you have a Telecommunications Service Management subscription. This installs the Order Management application, and the Telecommunication Open APIs (sn_tmf_api) for the TM Forum API REST specifications: Product Catalog, Service Catalog, Product Order, Service Order, Product Inventory, and Technical Service Qualification.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configuring product offerings and catalogs

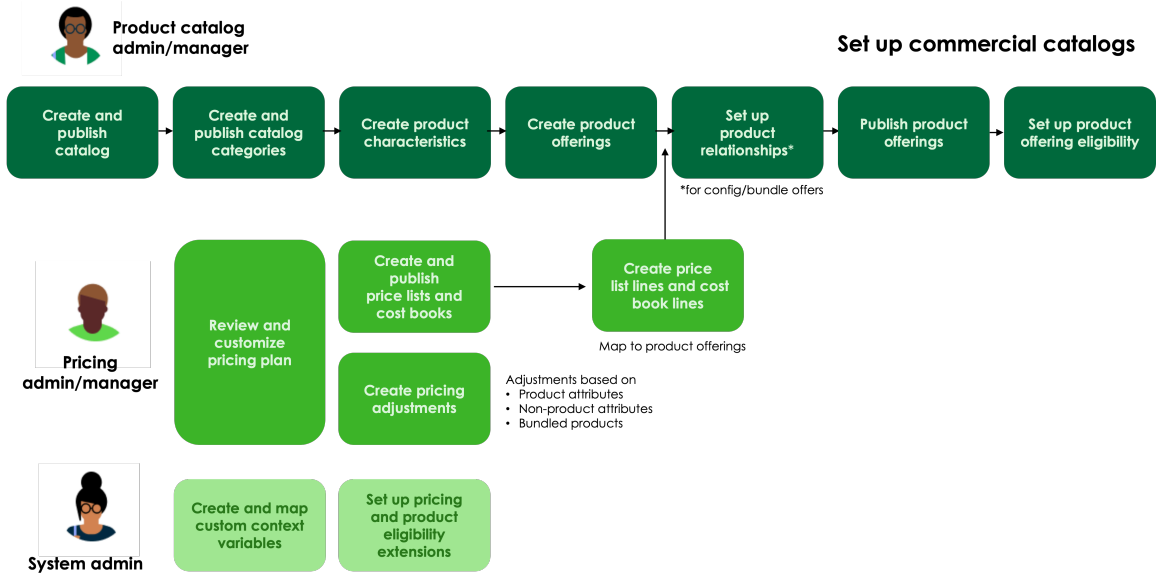
Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management agents for pre-sales activities, order capture, and post-sales engagement.

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

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.

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Product catalog and pricing configuration workflow



Note:
Review your entitlements to see the product offering options available to you.

Overview of product offering and catalog configuration

Starting with the May 2024 release of Sales Customer Relationship 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 Customer Relationship Management agents as they create opportunities, quotes, and orders.
Add product visuals	Add images and thumbnails to your product offerings to help agents as they build opportunities, quotes, and orders.
Create product offering relationships	Create product relationships to bundle products and services together to streamline the order process. Product offering

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Product offering and catalog management configuration tasks (continued)

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

Create 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**.

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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 upl0ad 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 Customer Relationship 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 Customer Relationship 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.

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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

Field	Description
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. Selecting **Leaf** means the category can have product offers but not subcategories. If **Leaf** isn't selected, the category 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.

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Field	Description
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_prd_pm.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.

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Control cascading quantity values in child product offerings

Control how the quantities for child line items in a product offering for an opportunity, quote, or order are calculated by using the *sn_prd_pm.enable_cascade_quantity* system property.

Before you begin

Role required: admin

About this task

The *sn_prd_pm.enable_cascade_quantity* system property, if enabled, automatically cascades the quantity value for a top-level offer to child lines, when the quantity for the top-level offer is greater than 1. For example, when an agent creates an opportunity, quote, or order for a configurable offer and updates the quantity so that it's greater than 1, the quantity on the child line items is multiplied by the quantity for the top-level offer. Pricing for the child lines is based on the cascaded quantity. If you use the quantity on the child offers as the total quantity ordered, using cascading quantities considers the quantity on the parent offer as well.

However, if you consider the quantity on the child offer as the quantity of the child offer per one quantity of the parent offer, you might not want cascading quantity values.

Note:
If you're upgrading from a release before the November 2024 release, this property is enabled by default. If you don't want the quantity values to be cascaded to child lines, suppress this feature by setting the property to false.

Procedure

1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_prd_pm.enable_cascade_quantity* system property.
3. Set the property value for the cascading quantity feature in the **Value** field.
   - Enter `true` to activate this property.
   - Enter `false` to suppress this property if it's currently enabled.
4. Select **Update**.
   If you enabled this property, quantity values are cascaded to the child lines for product offers. If you suppressed this property, quantity values are not cascaded to the child lines for product offers.

Create product offerings

Create and publish a product offering in Sales Customer Relationship Management. Product offerings represent entities that are orderable from the provider of the catalog and includes pricing information. Once published, product offerings are available to agents as they create leads, opportunities, quotes, and orders.

Before you begin

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings** and select **New**.

Note:
You can also create a product offering from the product specification.

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3. In the Details tab, fill in the fields.

Create New Product Offering form

Field	Description
Number	System-assigned number for the product offering.
Name	Alternative name for the product offering to differentiate it from similar product names.
Display name	Name of the product offering to be added.
Offering type	Type of product offer. Select one of the following: ○ Product: A product entity that an agent can add to a lead, opportunity, quote, or order from the CSM Configurable Workspace. ○ Entitlement: An entity such as a warranty or subscription that can be added to a lead, opportunity, quote, or order by an agent.
Offering sub-type	Type of entitlement. Select one of the following: ○ Warranty ○ Extended warranty ○ License ○ Subscription
Sellable	Option indicating that 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.
Transient	Option indicating that the product is for one-time use. **Note:** When the order for a transient product is completed, the sold product or product inventory record for the product is set to an Inactive state, to differentiate the product from persistent products. ○ Move, Add, Change, Delete (MACD) actions can't be performed on the sold product or product inventory records of transient product offerings. ○ The **Create contract** option is not applicable to transient product offerings. For more information on transient products, see Defining transient products.
Description	Short description of the product offering. The description helps the order agent understand the product when creating a lead, opportunity, quote, or order.
Start Date	Date and time that the product offering is available for Sales Customer Relationship Management applications. Select the Calendar icon ( ) to choose the start date and time, then select **OK**.

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Field	Description
End Date	Date and time that the product offering is deleted from Sales Customer Relationship Management applications. Select the Calendar icon ( ) to choose the end date and time, then select **OK**.
Offering type	Type of product offer. Select one of the following: ○ Product: A product entity that an agent or customer can add to a Sales CRM transaction. For example, agents can add products to a lead, opportunity, quote, or order from the CSM Configurable Workspace. Customers can add products to an order from the Business Portal. ○ Entitlement: An entity such as a warranty or subscription that can be added to a lead, opportunity, quote, or order by an agent.
Offering sub-type	Type of entitlement. Select one of the following: ○ Warranty ○ Extended warranty ○ License ○ Subscription
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. If you're using the Service Exchange Order Management for Providers application, enter Service Exchange.
Owner	Person responsible for the product offering.
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.
Allow multiple configurations	Option that enables agents or customers to create and manage multiple configurations of a child product offering so that each configuration can be handled as a separate line item in the configurable product. **Note:** If the product has an associated product specification, this option is enabled automatically and can't be deselected. For more information on how multiple configurations work in configurable products, see Multiple configurations.
Product specification	Functional view of a product offering that drives order fulfillment. If applicable, select a product specification.
Product model	Name of the product model associated with this product offering.

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Field	Description
Create contract	Option indicating to agents that entitlement contracts can be added to the product opportunity, quote, or order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts. **Note:** For transient product offerings, this option isn't available.
Contract term	Length of the contract: ○ 12 months ○ 24 months ○ 36 months ○ 48 months ○ 60 months
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.
Copy child specification characteristics	Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, selecting this option indicates that the characteristics are inherited from the child specifications in addition to the parent specification. This option is displayed when a product specification for a composite product is entered and the product offering is saved.
Offering Catalog	Catalog that contains the product offering.
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. If you're using the Service Exchange Order Management for Providers application, enter Service Exchange.
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.

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Field	Description
Version	Version number that is assigned to this product offering version.
Initial version	Name of the initial version of the product offering.
Previous version	Several versions of a product offering can exist. This field lets you view previous versions.

4. Select **Save** and then select **Publish**.

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 Customer Relationship 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 opportunities, quotes, and orders.

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.

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Field	Description
Description	Brief description of the characteristic, for example DSL speed.
Input type	List of input options that identify the functionality for the characteristic. Depending on the input type, additional options become available: ○ **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 tab. ○ **Date/time**: Input for the entry of a date and time of day. ○ **Duration**: Input for the entry of a duration of time. ○ **Email**: 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.

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
- If you're creating telecommunications products, create the product, service, and resource specification categories and associate them with model categories.

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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 Customer Relationship Management.

Before you begin

Role required: sn_prd_pm.product_catalog_admin

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 Customer Relationship 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

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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 Customer Relationship Management.

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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

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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 for the product relationship.
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.

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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 Customer Relationship 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

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Add a unit of measure to a product offering

Add a unit of measure (UOM) to a product offering in Sales Customer Relationship 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 Customer Relationship 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.

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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

Use relationship groups to organize child offer options or relationships into logical groups and set up cardinality rules at the group level in Sales Customer Relationship 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

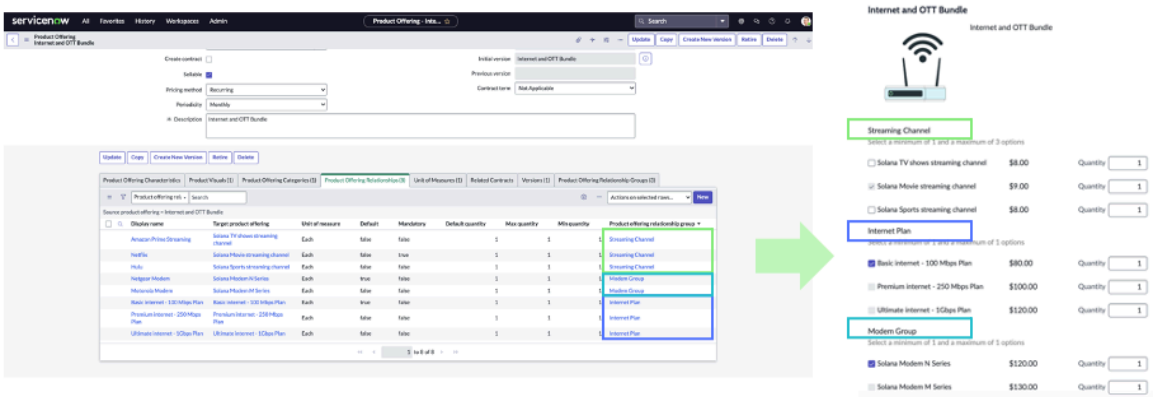
About this task

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.



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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.
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

Defining transient products

When you create product offerings and technical specifications, you can identify single-use products and services as transient, to differentiate them from persistent products. Examples of one-time use products include installation or consulting services.

When new orders with transient products are submitted for fulfillment in ServiceNow® Order Management, the sold product or product inventory records are created with an Installation pending state. After new orders with transient products are fulfilled, the sold product or product inventory state changes to Inactive. Your fulfillment managers can then quickly see which products aren't part of the active inventory. Agents can't perform Move, Add, Change, Delete (MACD) actions on inactive sold product or product inventory records.

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Guidelines for defining transient products

When you're defining product offerings, use the **Transient** option in the Create New Product Offering form to identify a transient product. If the product has associated technical specifications, you also set the **Transient** option in the appropriate Product, Service, and Resource Specification forms.

When defining transient products, note the following restrictions:

- Create New Product Offering form: The **Transient** option and the **Create contract** option can't be enabled at the same time for the product.
- Parent and child product offerings: Transient parent product offerings and parent specifications must have transient child product offerings and child specifications. However, non-transient parent product offerings and parent specifications can have transient child product offerings and child product specifications.
- Linking product offerings to product specifications: A transient product offering must be linked to a transient product specification and vice versa.
- Specification relationships: When defining specification relationships for a transient product, you can associate only a transient service specification or resource specification. Transient product orders are decomposed as indicated in the associated specification.

For details on setting the **Transient** option for product offerings and specifications, see the following sections:

- Create product offerings
-
- Create and publish service specifications
-

Multiple configurations

As a product catalog admin or manager, when you define a configurable product offering, you can enable agents to add multiple configurations of a child product offering. When agents add multiple configurations, they can change the quantity for each configuration of the offering, define each configuration as a separate line item, and select the appropriate options and characteristics for each configuration.

How multiple configurations work

When you use the Create New Product Offering form to define configurable product offerings and child product offerings, select the **Allow multiple configurations** option to enable the creation of multiple child offering configurations. For information on defining products, see Create product offerings.

> **Note:**
> If the configurable product has an associated product specification, the **Allow multiple configurations** option is enabled automatically and can't be unselected.

When agents add configurable products to new opportunities, quotes, and orders, they can create multiple configurations for a child offering. They navigate to a summary page for a selected child offering. From this page, they can do the following:

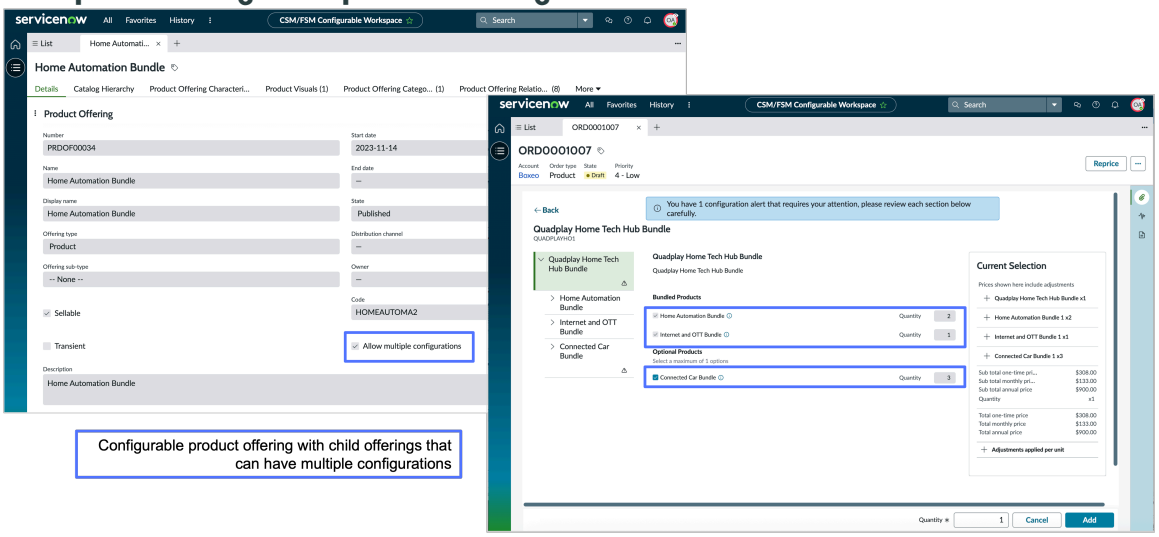
- Change the quantity for each configuration of a child offering.
- Clone a child offering.
- Split a child offering that has a quantity greater than 1, to create child offering configurations with different quantities.

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Each offering configuration becomes a new line item that can be configured separately.

In the following example, the Home Automation Bundle is a child offering that has a default quantity of 2 in the Quadplay Home Tech Bundle. An information icon displays next to each child offering that can have multiple configurations. The information icon, when selected, displays a message indicating that multiple configurations can be created for the child offering.

Example of a configurable product offering for an order



How multiple configurations are created

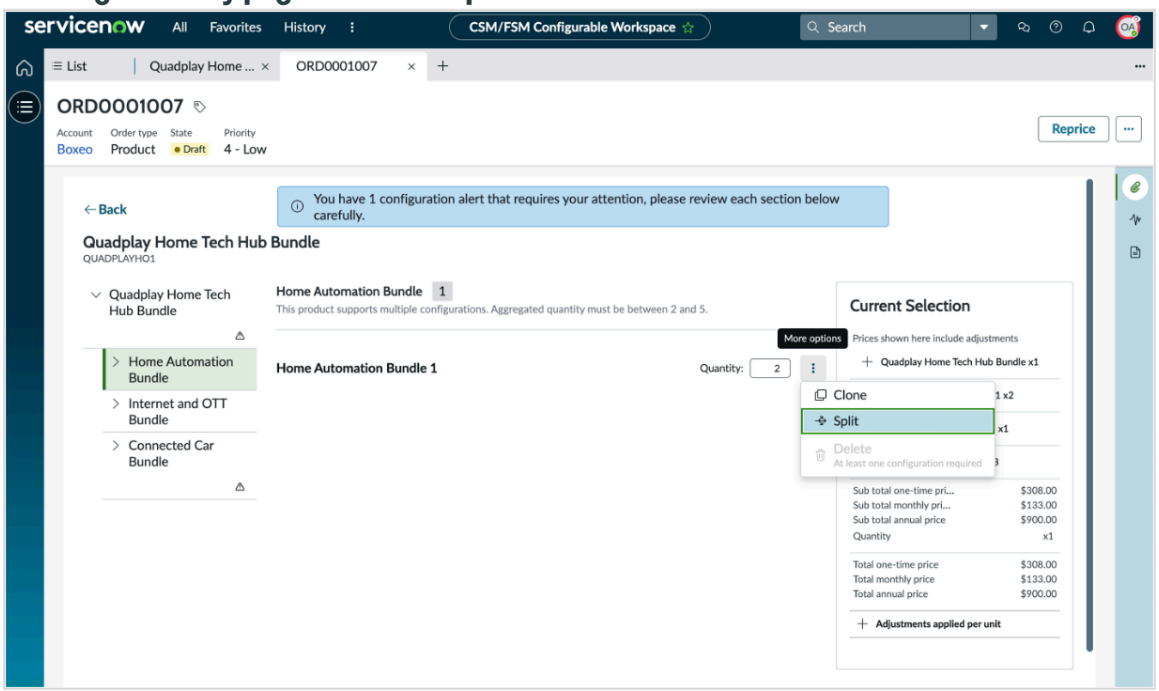
When agents review a bundle offering in the product configurator, they identify the child offerings that can have multiple configurations. They navigate to the summary page for the appropriate child offering to create multiple configurations.

In the offering summary page, a message indicates that the offering supports multiple configurations and the aggregated quantity of configurations that can be created. Agents can change the quantity of the child offering on this page.

The More options icon displays next to the **Quantity**. Selecting the icon lists the options available for creating and managing multiple configurations.

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Offering summary page with More options menu



The following options are available to manage child offering configurations:

- **Clone**: Create new child offering configurations by copying the selected child product offering configuration. The agent is prompted to enter the number of clones to be made.

  For example, if the current child offering quantity is 2, and the agent specifies 2 copies, two identical copies of the child product offering are created. Each clone becomes a separate line item and has a quantity of 1.

- **Split**: Create new child offering configurations by splitting the current child offering quantity and distributing the quantity evenly across all the copies. The agent is prompted to enter the number of splits.

  For example, if the child offering quantity is 5, and an agent specifies 3 splits, two child offering instances are created. After the split, there are three child offering instances, where the instances have a quantity of 2, 2, and 1, respectively.

- **Delete**: Removes the child offering instance. If deleting a child offering instance causes the number of child offers to fall below the minimum quantity defined for the product, the **Delete** option isn't available.

When the child offering configurations are created, each offering name reflects the child product offering name followed by an incremental number. For example, Home Automation Hub configurations are named Home Automation Hub 2, Home Automation Hub 3, and so on. Agents can then select the appropriate offering instance to configure it. If the agent changes the **Quantity** value, the Current Selection pane reflects the new quantity and associated pricing.

Validation during multiple configuration creations

As your agents create multiple configurations, the system uses the default, minimum, and maximum cardinality rules defined for the product offering to validate the configurations. If there are violations, the system displays the appropriate information and error messages in the product configurator UI.

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The system also uses the cardinality rules to determine when certain configuration options (**Split** and **Delete**) should be enabled or turned off, based on the context. For example, if the minimum child offering quantity is 1 and a child offering has a quantity of 1, the system disables the **Delete** option in the More options menu.

Limitations for multiple configurations

Multiple configurations are not supported for quotes of type sales agreements. Also, changes for quotes and orders with sold products or product inventory have the following limitations:

- Sold products: When creating a modify order, the **Delete** option for multiple configurations is supported, but the **Clone** and **Split** options aren't supported.
- Product inventory: Multiple configurations are supported. The **Split** option isn't supported.

Setting up multiple configurations

For details on enabling and creating multiple configurations for child offerings, see the following sections:

- Create product offerings
- Create multiple configurations

Setting up specifications and product offerings

By creating and publishing 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.

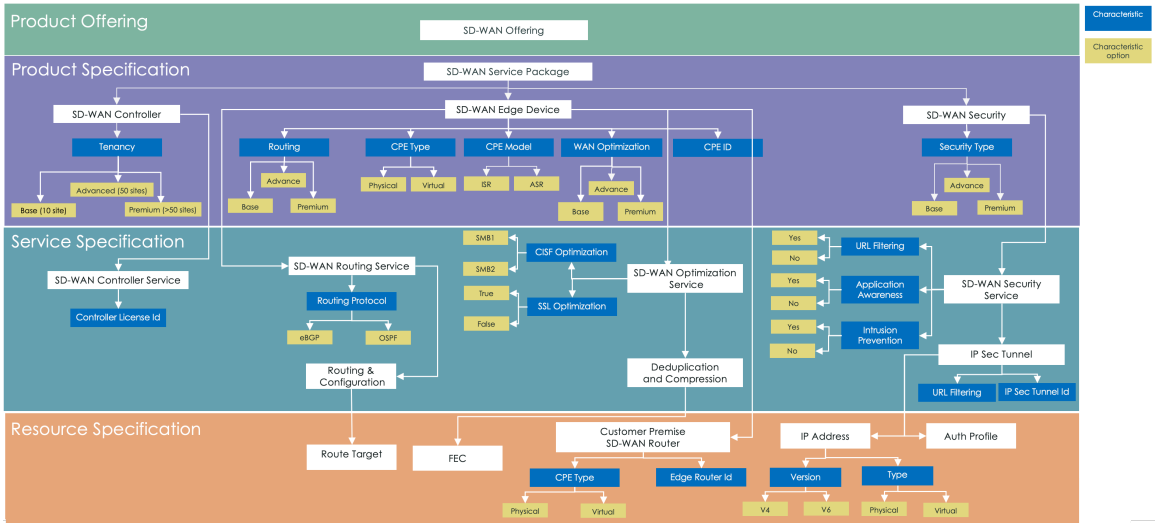
Overview of product offerings with specifications

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.

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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 .

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 .

Resource specification

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

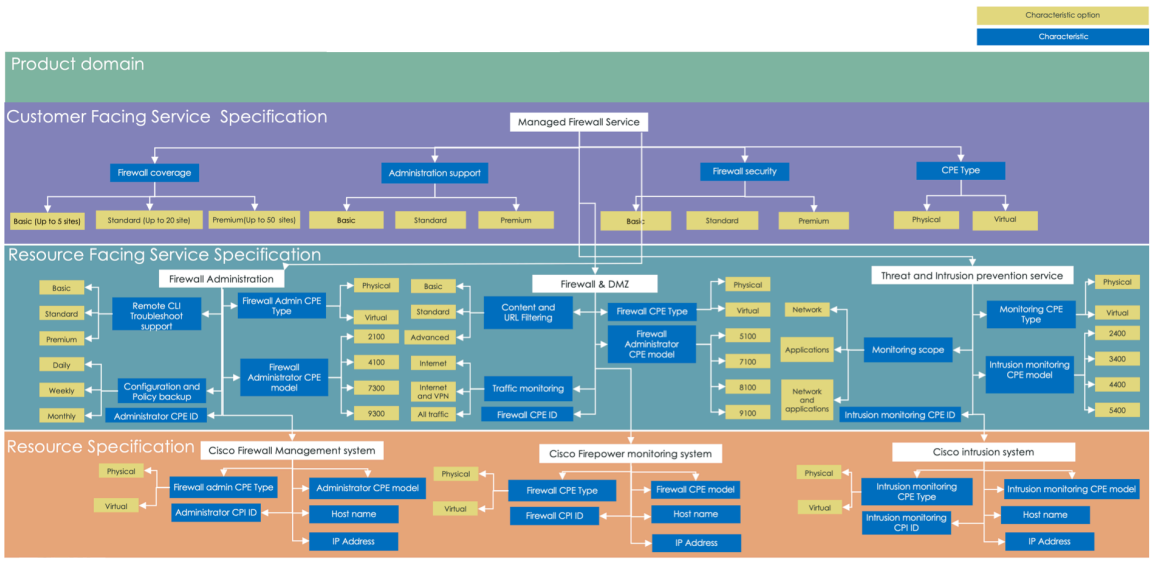
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- All the specification characteristic options that are available for a resource, and how they should be fulfilled.
- Various categories of information, such as the manufacture, model, and brand-related information about a resource, including the resource 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 .

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

Managed firewall service structure



Product offer bundling with product specifications

Product Catalog Management supports the bundling of product offers that have associated product specifications or specification hierarchies at any level of the bundle.

Supported product offer bundles

As a product catalog admin or manager, you can create a bundle offer for the following product offer combinations:

- A top-level offer with several offers in multiple levels, but no product specification reference at any level.
- A top-level offer with several offers in multiple levels that can have a product specification reference at any level.
- A top-level offer with two or three levels of nesting, where the leaf-level product offer references a specification hierarchy.

When offer bundles that have a specification reference at different levels are added to a quote or an order, the appropriate transaction lines are generated with specification references and product offer references. If fulfillment is done in ServiceNow Order Management, the applicable domain orders are generated and records for sold products and product inventory are created or updated.

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Characteristics inherited from product specifications

When you create a product offering and reference a product specification hierarchy, you can select an option called **Copy child specification characteristics**. When you select this option, the product offer inherits all the characteristics from the specification or specification hierarchy. For example, if a product offer has an associated product specification, the characteristics are inherited from the child specifications in addition to the parent specification. The attributes from parent specification are always inherited by the product offer.

You can also do the following when you create a bundle product offering:

- Add other characteristics to the offering, such as attributes for order enrichment, aside from characteristics inherited from the specification.
- Delete product offering characteristics that were inherited from the specification.

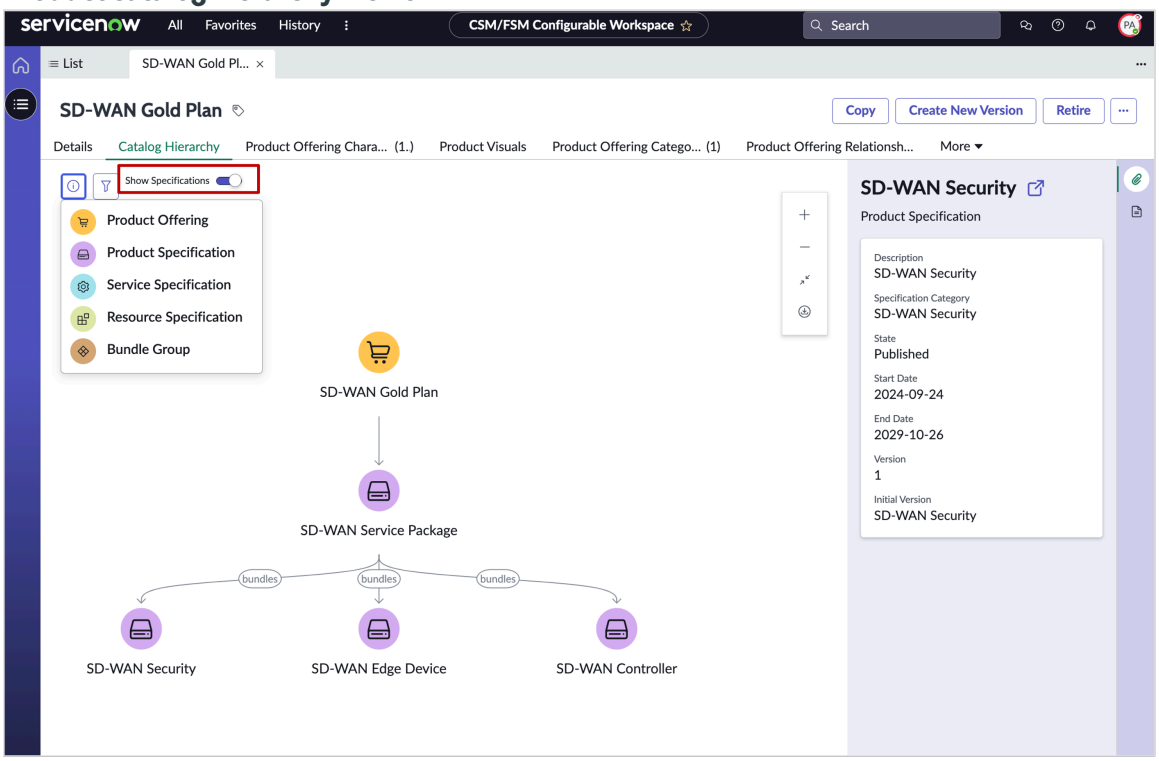
To learn more about product offerings, see Create product offerings.

Product catalog hierarchy visualization

As a product catalog admin or manager, you can view the complete hierarchy of a product offering and any associated specifications (product, service, and resource). Use these views to verify that all entities have been defined and associated correctly.

For product offerings that have associated specifications, you can toggle the hierarchical view of the product offering to show its specification hierarchy. The hierarchical specification view shows the services that enable the product to be realized and the resources that are required to deliver those services. This view helps you visualize different aspects of a product offering, to validate the product and determine that the supporting services and resources are designed as needed. The hierarchy also highlights any relationships between specifications.

Product catalog hierarchy views



To view the product catalog hierarchy in the CSM Configurable Workspace, in the List view navigate to **Offerings** > **Product Offerings**. Select a product offering, then select the Catalog

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Hierarchy tab. Use the **Show specification** toggle to switch between the product offering and specification hierarchical views.

The toggle legend identifies the product offering and specification icons displayed in the visualization. Similar to the selection of specification nodes, when you select any product offer node, the side panel displays the high-level details of the product offer. You can use the filter to select a node and display the hierarchy under the node rather than the whole tree.

Configuring product offer eligibility

You can filter the product catalog, offering categories, and product offerings dynamically, to display only the appropriate catalog, categories, and offerings for which a customer is eligible. Your agents see this filtered product information when they're creating opportunities, quotes, and orders.

Product offer eligibility overview

As a product catalog admin or manager, you create the business rules that filter the product catalogs, offering categories, and product offerings to display only the eligible products for customers when agents are creating quotes or orders. Filtering the products helps agents sell the correct products to customers. The filters are based on decision rules that you set in the following product eligibility matrices:

- **Product Offering Catalog Eligibility**: Define the eligibility rules to be applied to product offering catalogs. For example, you can use this matrix to filter sales catalogs based on customer location, such as country, state, or city.
- **Product Offering Category Eligibility**: Define the eligibility rules to be applied to product offering categories.
- **Product Offering Eligibility**: Define the eligibility rules to be applied to product offerings.

These matrices are frameworks for setting the conditions and the context variables that control the catalogs, product categories, and product offerings displayed. You can use system-defined context variables provided with Product Catalog Management and Pricing Management, or you can work with your admin to develop your own custom context variables, such as marketing segment or sales channel, to be used in the eligibility matrices.

Configuration tasks

Complete the following tasks to set up product eligibility matrices.

Product eligibility configuration tasks

Task	Description	Role
Create a custom context variable (if needed)	Review system-defined and existing custom context variables. If needed, add a new context variable, then map the customer variable to a transaction entity.	Admin
Create a rule entity filter	Define the eligibility filters for a product entity.	Product catalog admin or manager
Define product eligibility rules in a product eligibility matrix	Define the eligibility rules in the decision table of a product eligibility matrix.	Product catalog admin or manager

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Create a rule entity filter

Create a rule filter for the product entity to be used in a product eligibility matrix. The rule filter defines how the rule is applied, for example to a product catalog, category, or offering.

Before you begin

Determine the entity to which the filter applies, for example a particular product catalog, category, or a product offering.

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 **Context Rule Management** > **Rule Entity Filter**.
3. Select **New**.
   On the form, fill in the fields.

Rule Entity Filter

Field	Description
Filter Name	Name of the filter, for example `Ineligible offers for CA`.
Entity	Product entity for the rule: ○ Product catalog ○ Product offering category ○ Product offering
Filter type	Type of filter to be applied: ○ Static: Use a particular list to filter the product entity. ○ Dynamic: Set the conditions to filter the entity.
Code	System-generated alphanumeric number based on the filter name.
Product <catalogs, categories, or offerings>	The product catalog, category, or offering to be filtered, based on the **Entity** selected. This field appears only when Static is selected as the **Filter type**.
Condition	Condition to be used to filter the entity. Use the **Set conditions** builder to specify the conditions. This field appears only when Dynamic is selected as the **Filter type**.

4. Select **Save**.
   The rule filter can now be used in a product eligibility matrix.

Define product eligibility rules in a product eligibility matrix

Define product eligibility rules by using the Product Offering Catalog Eligibility, Product Offering Category Eligibility, or Product Offering Eligibility Matrix.

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Before you begin

Create the rule entity filters and define any new custom context variables needed to define the eligibility rules.

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

About this task

When you define eligibility rules, consider the two modes for determining eligibility:

- Ineligible: Determine all the catalogs, categories, and product offers that are considered ineligible by default, then set your eligibility rules as needed.
- Eligible: Determine all the catalogs, categories, and product offers that are considered eligible by default, then set your ineligibility rules as needed.

Use the **Default result** field in the decision table for the product eligibility matrix to control the default mode.

The November 2024 release provides Version 2 of the product eligibility matrices, which now support eligibility rules based on transaction line attributes. You can also use service location context variables to set product eligibility rules for service locations: Service City, Service State, Service Country, and Service Zip.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Rule Matrices**.
3. Select the product eligibility matrix for the rule to be defined.
   - To set the eligibility rules for a product catalog, select the Product Catalog Eligibility Matrix.
   - To set the eligibility rules for a product category, select the Product Category Eligibility Matrix.
   - To set the eligibility rules for a product offering, select the Product Offering Eligibility Matrix.
4. Select **Edit Rule**.
   The Decision Table for the selected eligibility matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions that control the eligibility.
5. In the decision table, set the rule to control the eligibility.
   a. In the **Default result** field of the Condition section, review the eligibility mode being used and update it if needed.
   b. Select **Add new decision row**.
   c. In the row, select the column for the input (context variable) to be applied, such as the Billing State or Account.
   d. In the **Active** column, set the value to true.
   e. In the Results section, under the **Eligibility Rules** column, select the eligibility state to be applied, for example Ineligible or Eligible.
   f. Under the **Rule Entity Filter** column, select the filter to be applied.
6. Select **Save**.
   Review the **Validation Status** and **Validation Messages** columns to see if you're missing mandatory inputs, outputs or other information. If so, enter the appropriate information and select **Save**.
   The filtered product entity (product catalog, category, or offering) is displayed or hidden to sales and order agents, depending on the filter.

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Use extension points in product eligibility

Use extension points to call custom scripts from external sources that control product eligibility logic used in the Sales Customer Relationship Management (Sales CRM) applications.

To access the available extension points, navigate to **All** > **Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

Product eligibility extension points

Extension point	Description
`sn_prd_pm.EligibilityRulesExtensionPoint`	Extension point for defining eligibility methods for product catalogs, categories, and offerings.

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 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.

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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 Yokohama 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

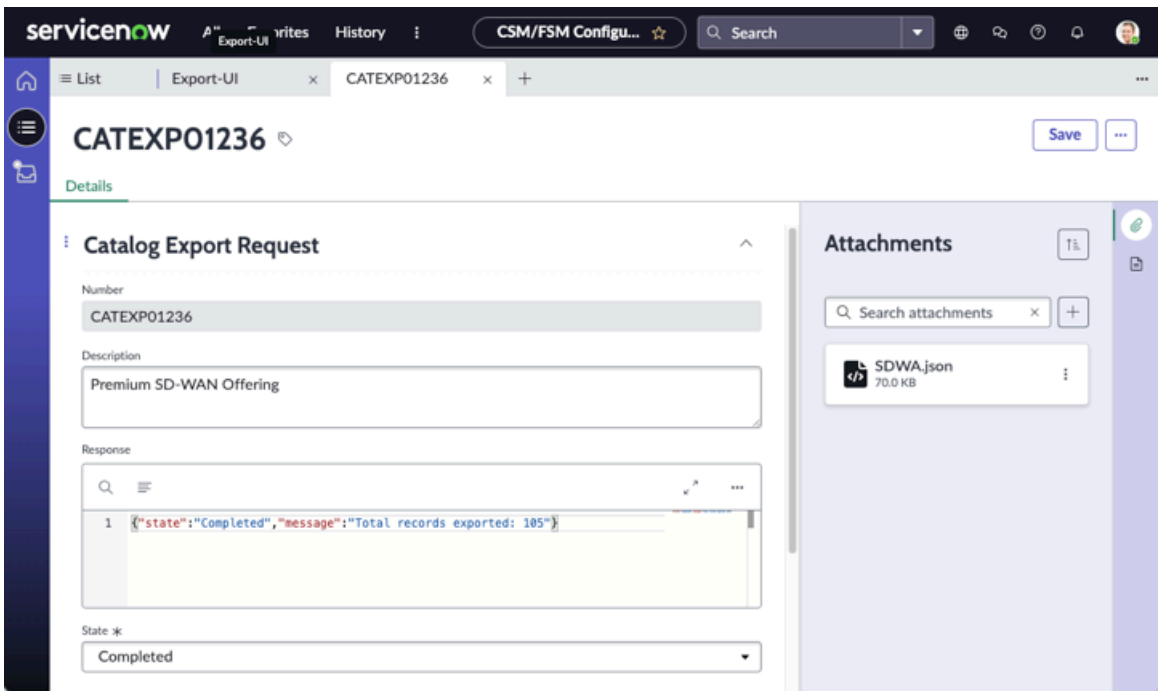
About this task
You can export catalog entities in any sequence, but they must be imported to a target instance in a certain order. You import base entities (characteristics and characteristic options, template, and unit of measure) first, followed by the product catalog, product offerings, and product specifications.

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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

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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

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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.

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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.

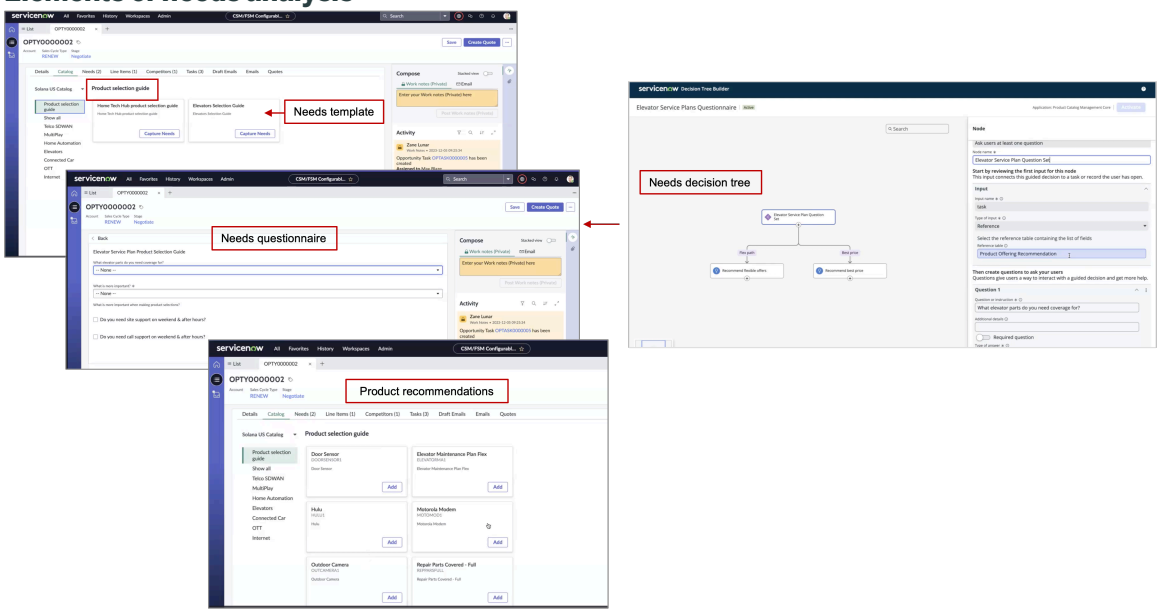
Configuring needs analysis

As a product catalog administrator, you can create needs templates, which are questionnaires that agents use to find product offers to add to a lead or 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 a lead or opportunity.

Overview of needs analysis

When agents create a lead in the Lead Management application or 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

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A multi-step, guided decision process that presents a series of questions to the agent. You use Decision Tree Builder to create and build the decision tree.The decision tree defines the question nodes, expected answers, connection points, decision logic, and guidance for decision paths in the questionnaire.

Product recommendations

The product offerings suggested for an opportunity or lead, 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. Needs analysis provides a default guidance, the Product Offering Recommendation guidance, which references information from the Needs Based Offering Recommendation [sn_prd_pm_product_offering_recommendation] table as you create the question nodes and guidances in the decision tree.

Before creating decision trees for needs templates, review how decision trees work:

- Decision trees in Guided decision - Learn 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 needs-based product offering 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 needs-based product offering 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. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Needs** > **Needs Based Offering Recommendation** and select **New**.
   On the form, fill in the fields:

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Create New Needs Based Offering Recommendation 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 offering to be recommended.

3. Select **Save**.
   The selected product offering is available as a product offering recommendation and can be selected as a guidance node 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. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Needs** > **Decision Tree** and select **New**.
3. Select **New**.
   On the form, fill in the fields.

Create New 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.

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Field	Description
Description	Brief description of the decision tree. The description is 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 or lead creation. This field is enabled by default.

4. Select **Save**
   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.

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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. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Needs** > **Needs Template** and select **New**.
   On the form, fill in the fields.

Create New 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 **Save**.

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The Needs Template Relationship tab opens. The needs template is also listed in the Needs Template list.

4. In the Needs Template Relationship tab, set the catalog relationship.

   a. Select **New**, which opens the Create New Needs Template Relationship form.

   b. In the **Catalog** field, select the published Product Offering Catalog to which this needs template belongs.

   c. Select **Save**.
   The selected catalog name is listed under the **Catalog** field in the Needs Template Relationships section.

5. Select **Publish** to make the specified catalog available in the product selection guide.

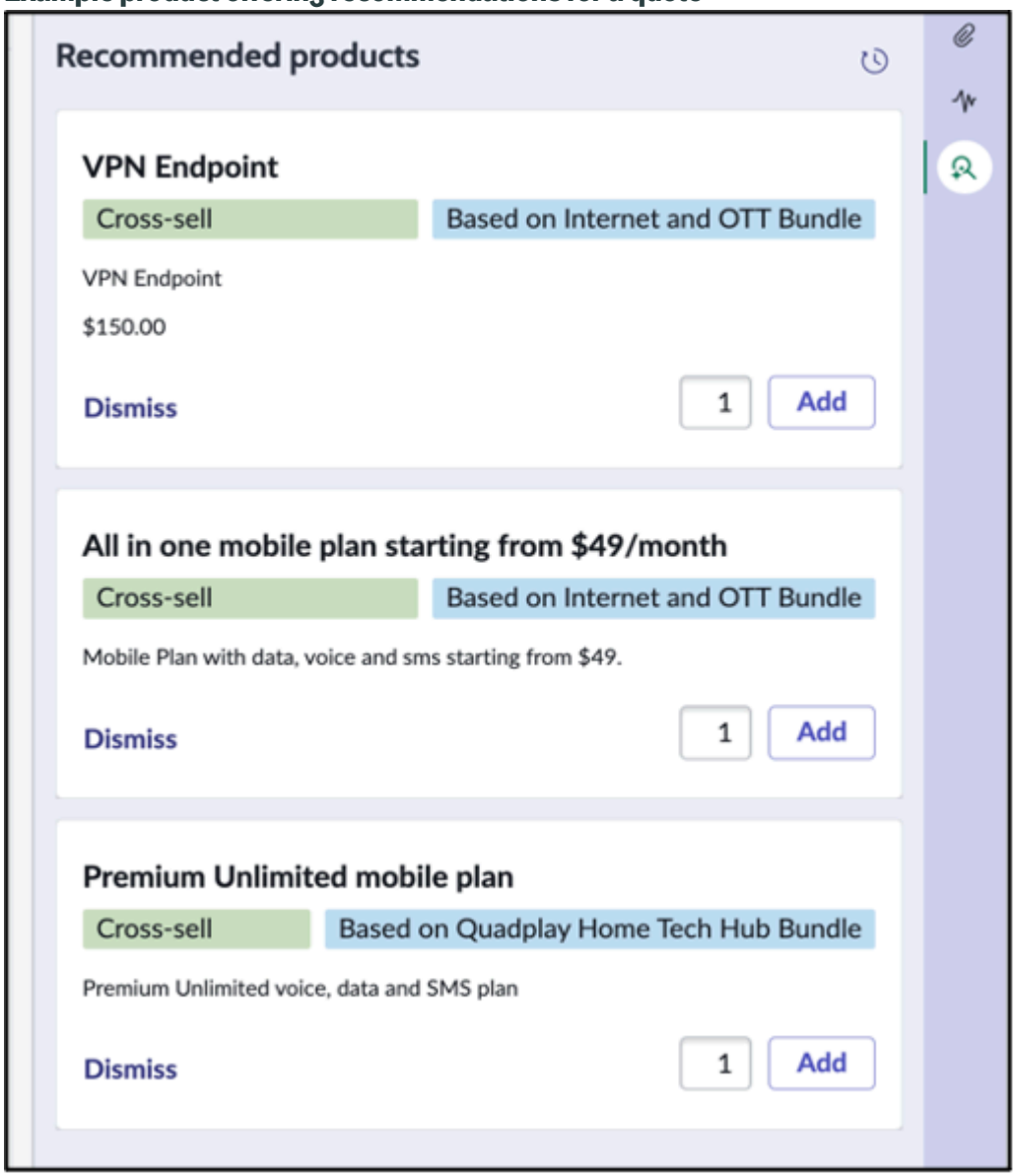
Configuring product offering recommendations

As a product catalog admin or manager, you can create product offering recommendations that agents can use to upsell or cross-sell additional products in quotes.

Product offering recommendations provide your sales agents with relevant products to supplement or complement existing items in quotes. The recommendations are displayed as cards in the contextual side panel of the CSM Configurable Workspace when your agents update a draft quote. Product offering recommendations enable your agents to find and add relevant items quickly to their quotes.

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Example product offering recommendations for a quote



As a catalog admin or manager, you configure product recommendations by identifying the source product offerings, the type of recommendation, and the associated recommended product. There are two types of product recommendations:

- Upsell: An upgraded or enhanced version of a product in the quote.
- Cross-sell: A related product that complements a product in the quote.

For details on configuring product recommendations, see Create a product offering recommendation.

Create a product offering recommendation

Create product offering recommendations that can be used by your sales agents to upsell or cross-sell additional products in quotes.

Before you begin

Review the product offerings that your sales agents can add to quotes, then determine the complementary and supplementary products that can be recommended to upsell or cross-sell additional products for those products. The source product offerings and also the recommended product offerings must be published in the product catalog.

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Role required: Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product_catalog_admin, admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Recommendations** > **Product Offering Recommendations** and select **New**. Fill in the form.

Create New Product Offering Recommendation

Field	Description
Source product offering	Product for which a recommended product offering is to be defined. The source product can be a simple or complex product. Select from the list of published product offerings.
Recommended product offering	Product recommended for the source product offering. Select from the list of published product offerings.
Type	Option that indicates the type of recommendation: ○ Upsell: Recommendation for upgrading or enhancing the source product, for example a better or bigger version of a product. ○ Cross sell: Recommendation for buying a product that is related to but different from the source product.
Active	Option that indicates the recommendation is active and displayed to agents when they're adding or updating quotes and quote line items. To deactivate the product offering recommendation, deselect this option.
Order	Number that determines the sequence in which the recommendation is displayed in the contextual side panel of theCSM Configurable Workspace.
Description	Brief description of the offering recommendation.

3. Select **Save**.
The product recommendation card for the product is displayed to your agents when they're updating a quote that has the source product offering for this recommendation. For more information on how sales agents use product offering recommendations, see Get additional product offering recommendations for quotes.

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.

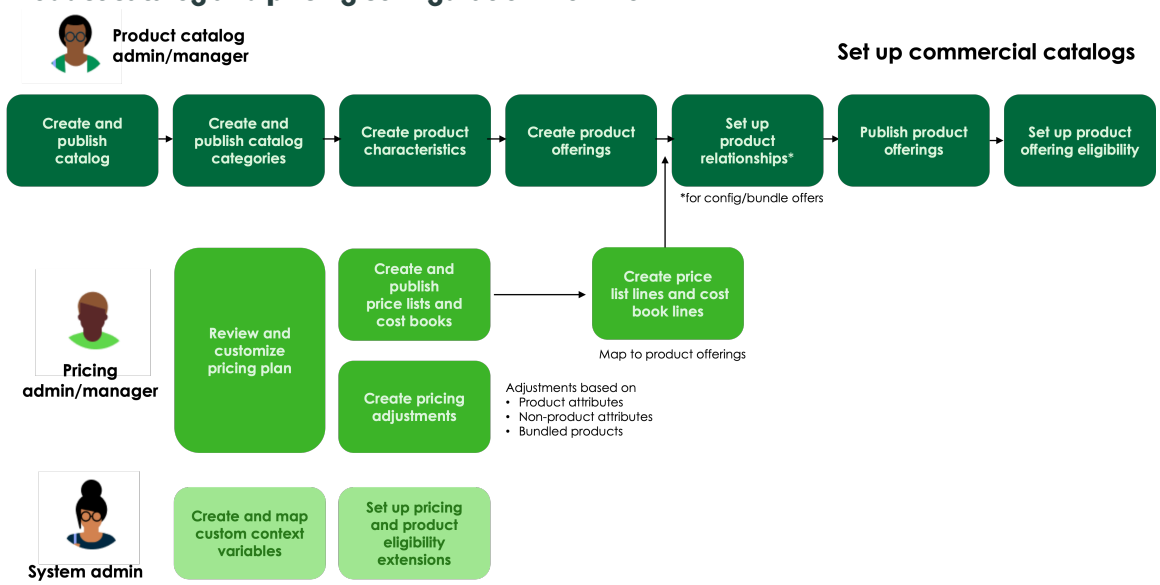
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Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales Customer Relationship Management.

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 Customer Relationship Management applications, you can use the CSM Configurable Workspace to configure product pricing.

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

Configuration tasks for Pricing Management

Configuration task	Description
Configurable pricing plans	Customize the default pricing plan provided with Pricing Management. You can add, change, or delete the sequence of steps in which pricing calculations and adjustments are run to determine product offering prices.
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.
Copy a price list	Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables.

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Configuration tasks for Pricing Management (continued)

Configuration task	Description
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.
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.
Copy a cost book	Duplicate a cost book and its cost book lines.
Control the default cost book on transaction header or header line	Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix.
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 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 custom 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 Customer Relationship 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.

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Configuration tasks for Pricing Management (continued)

Configuration task	Description
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.

Configurable pricing plans

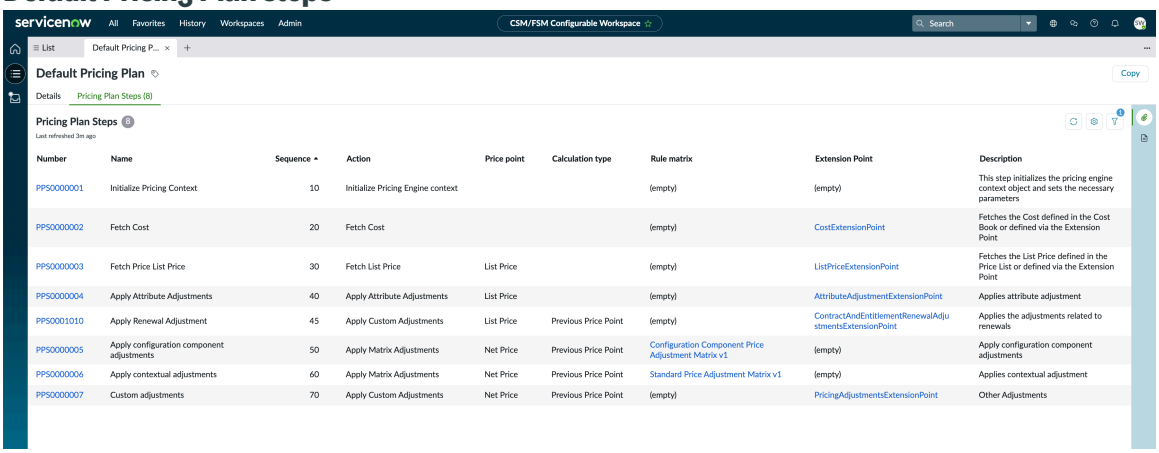
Pricing Management provides a default pricing plan that defines the sequence of steps in which pricing calculations and adjustments are applied to determine final product prices.

How the pricing plan works

The default pricing plan is an active, published plan that is automatically implemented starting with the November 2024 release. You can use the default plan, or you can copy the default plan and customize it by adding or changing the pricing steps to tailor it for your organization. You can have only one active pricing plan per domain.

Note:
The May 2025 release provides a default pricing plan that includes a new step, Apply Renewal Adjustment. If you've been using a custom pricing plan from an earlier release, review the default pricing plan, which is in a Retired state after upgrading to the May 2025 release. Determine whether you want to publish the default plan or customize the default pricing plan for your needs and then publish the custom plan to be used.

Default Pricing Plan steps



The default plan consists of basic pricing steps in which certain actions are run to calculate product offering prices.

Pricing steps

Step	Action
Initialize Pricing Context	Starts the pricing engine context. The system gathers basic data required for subsequent calculation steps. For example, the system resolves context variable values, initializes the pricing cache, and performs basic validation of request payloads.

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Pricing steps (continued)

Step	Action
Fetch Cost	Get costs from a cost book, if your organization is using cost books in Quote Management.
Fetch Price List Price	Get the list price for all requested products based on the price list, unit of measurement, and data provided to the pricing API.
Apply Attribute Adjustments	Apply attribute adjustments based on product characteristics selected.
Apply Renewal Adjustment	Apply a renewal adjustment for contracts. This step determines whether a markup or markdown value, either a percentage or specific amount, such as a pricing uplift for contract renewals, is to be calculated and applied. **Note:** • Subsequent pricing adjustment steps in the pricing plan are not applied after this renewal adjustment step. • You can change or remove this step in a custom pricing plan. You can also change the conditions for running subsequent steps after the renewal adjustment step. For details on changing conditions for a particular step, see Add or change a pricing plan step.
Apply configuration component adjustment	Apply adjustments as defined in the Configuration Component Price Adjustment Matrix for child product offerings that are bundled under a parent product offering.
Apply contextual adjustments	Apply adjustments as defined in the Standard Price Adjustment Matrix for product offerings based on non-product characteristics, such as billing state or shipping zip code.
Custom adjustments	Apply custom adjustments if implemented using the PricingAdjustmentExtensionPoint to fetch adjustments from another system or for adjustments that can't be supported via a pricing matrix.

For the configuration component adjustments, contextual adjustments, and custom adjustments, the **Price point** and **Calculation type** values in a step determine how multiple pricing adjustments are calculated:

- **Price point**: The price for a product or service that is calculated after the step is run, either the List Price or Net Price.
- **Calculation type**: Method for evaluating the impact of the adjustment at each step. The adjustment is applied to either the Previous Price Point or the Rolling Price.

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- When the Calculation Type is Previous Price Point and the price point is Net Price, the previous price point is List Price. The adjustment is applied to the List Price.
- When the Calculation Type is Rolling, the adjustment calculated is based on the output of the previous step.

Example pricing plan calculations

The following example shows how multiple pricing adjustments in a pricing plan are calculated and applied to a door sensor product. The door sensor is part of the Home Automation bundled product, which is being sold to Boxeo, a customer in California. The price of the door sensor is based on the price list for Boxeo.

Pricing plan calculations for a product

Pricing Plan Step	Data Input	Data Output	Adjustment (Previous price point*)	Adjustment (Rolling)
Initialize pricing engine	-	-	-	-
Fetch list price	$18 (Boxeo Price List)	$18	-	-
Apply attribute adjustments	$2 (Door sensor doesn't have any characteristic options)	$20	-	-
Apply configuration component adjustments	20% markdown (Discount as part of a bundle)	$16	$4 (Applied on list price)	$4 (Applied on output of previous step)
Apply contextual adjustments	10% markdown (Customer located in CA)	$14/$14.40	$2 (Applied on list price)	$1.60 (Applied on output of previous step)
	Final price after discount		**$14**	**$14.40**

* Applied on List Price, which is the Previous Price Point

Customizing a pricing plan

The default pricing plan is fixed, to preserve the default pricing logic. You can copy the default plan, and add or change steps as needed for your organization. When you finish your changes, you publish the copy so that it becomes the active plan. If needed, you can revert to the default plan at any time by publishing the default plan.

As a pricing admin or manager, follow these steps to define a custom pricing plan:

- Create a configurable pricing plan (copy the default plan).
- Add or change a pricing plan step. In your configurable pricing plan, you can add one or more pricing steps for pricing adjustments, including any conditions for running the step. You can also change the sequence of the adjustment steps, if needed.
- Delete a pricing plan step, if needed.

As you add or change pricing steps, the system validates your entries, such as the sequence number, price point, and calculation type. When you finish adding or changing steps, publish the configurable pricing plan to make it active. The former active plan is retired.

Create a configurable pricing plan

Create a configurable pricing plan by copying the default pricing plan provided in Pricing Management.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the default pricing plan and select **Copy**.
   The copy of the default pricing plan opens in a new tab in the Draft state.
4. Provide the pricing plan details:
   a. Enter the **Name** of the pricing plan.
   b. If you want price adjustments to be applied after price overrides, select the **Apply adjustments after price override** option.
   If you select this option, after the system applies a price override, any remaining pricing steps are run. If you don't select this option, any pricing steps scheduled after the price override is applied are not run.
   c. Enter a new **Description** for the custom pricing plan.
5. Select **Save**.
   The configurable pricing plan is created with the **Name** that you provided.

What to do next

Add or change a pricing plan step.

Add or change a pricing plan step

Add a pricing plan step to a configurable pricing plan that applies either a pricing matrix or a custom adjustment using the pricing extension point. You can also change certain items in an existing step, such as the sequence or type of matrix used, as well as specify conditions for running the step.

Before you begin

Create a configurable pricing plan.

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

You can add or change a pricing plan step only when the configurable pricing plan is in the Draft state.

Note:
The following steps in all pricing plans are fixed and can't be changed:

- Initialize Pricing Context
- Fetch Cost
- Fetch Price List Price
- Apply Attribute Adjustments

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Plans**.
3. Select the configurable pricing plan to which steps are being added or changed.

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4. In the pricing plan, select the Pricing Plan Steps tab.
   - To add a step, select **New**.
   - To change a step, select the step number to be updated. If you need to delete a pricing adjustment step, see Delete a pricing plan step.
5. Fill in or change certain fields in the form.

Pricing Plan Step

Field	Description
Number	System assigned number for the pricing plan step.
Name	Name of the step to be added.
Description	Brief description of the step.
Price point	Selling price for a product or service. Select one of the following: ○ List Price: Standard selling price to be applied before any pricing adjustments. ○ Net Price: Final price to customer after predefined or negotiated adjustments have been subtracted.
Calculation type	Option for evaluating the result of the adjustment at each step. Select one of the following: ○ Previous price point: When the Price Point is Net Price, the previous price point is List Price. The adjustment is applied to the List Price. ○ Rolling: When multiple adjustments exist, apply the subsequent adjustment to the price resulting from the previous adjustment to calculate the final net price.
Sequence	Number value indicating the order in which the step is to be applied. For example, if you're adding a step between two existing steps with sequence numbers 40 and 50 respectively, you could enter the sequence number 45 for the step.
Code	System-generated alphanumeric number based on the pricing plan step name.
Action	Option indicating the type of pricing adjustment to be run in the step. Select one of the following:

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Field	Description
	○ Apply Matrix Adjustments: Run a pricing matrix. ○ Apply Custom Adjustments: Run a custom pricing adjustment using the PricingAdjustmentsExtensionPoint.
Rule matrix	Option that displays if you selected the Apply Matrix Adjustments action. Select the pricing matrix to be applied: ○ Configuration Component Price Adjustment Matrix: Use this matrix to set the price adjustments for child product offerings that are bundled under a parent product offering. ○ Standard Price Adjustment Matrix: Use this matrix to set a pricing adjustment for a product offering based on non-product characteristics, such as billing state or shipping zip code. You can select the rule matrix link in the step to define the matrix.
Pricing plan	Name of the configurable pricing plan.
Extension point	Option that displays the PricingAdjustmentsExtensionPoint if you selected the Apply Custom Adjustments action.

6. Specify certain conditions for running the step, if applicable.

> **Note:**
> Any conditions that aren't met, are ignored.

7. Select **Save**.
8. To continue adding or changing steps, repeat steps 4 through 7.
   If you need to remove a step, see Delete a pricing plan step.
9. When you're finished adding or changing steps, select **Publish**.
   The configurable plan becomes the active pricing plan, and the former active plan is retired.

Delete a pricing plan step

Remove a pricing step from a configurable pricing plan when the plan is in the Draft state.

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 **Pricing** > **Pricing Plans**.

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3. Select the configurable pricing plan to be changed.
4. In the pricing plan, select the Pricing Plan Steps tab and then select the step number to be deleted.
5. In the More actions menu, select **Delete**, and confirm that you want to delete the step. The step is removed from the pricing plan.

Create and publish a price list

Create a price list that defines the pricing for products and services in Sales Customer Relationship 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.
Sales agreement	If you're using the Sales Agreement Management application and a sales agreement was created by an agent, the unique system-assigned number that identifies the sales agreement associated with this price list.
Description	Description of the price list.
State	Stage of the price list:

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Field	Description
	○ 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**. **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 **Pricing** > **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.

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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**.
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**.

Copy a price list

Duplicate a published price list and its associated price list lines, attribute adjustments, and decision tables. You can copy a price list, update the pricing in the copied price list if needed, then publish it.

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 **Pricing** > **Price Lists**.
3. Select the published price list to be copied and select **Copy**.
   The state changes to Copy in Progress and a message indicates that the copy is starting. You can't edit the price list, price list lines, any attribute adjustments, and related decision tables during the copy process. Each price list line and the other related pricing features are copied asynchronously. During the copy process, you can refresh the page to see the items copied. When the copy process completes, the following occurs:
   - The copied price list is available in the Draft state and opens in a new tab.
   - Any errors that occurred during the copy process, for example a price list line didn't get copied, are displayed in a message in the copied price list.

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4. Select **Save**.
   When the price list copy is in the Draft state, you can add or change price list lines or delete the price list. When you finish updating the copied price list, you can publish it so that it's available for use.

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, the default price list used is based on the transaction header. For example, if a sales agreement is populated on the transaction header, the sales agreement price list is used as the default. 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.

You can change the default price list selection logic by using the Price List Defaulting 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 Price List Defaulting Matrix.
4. Select **Edit Rule**.
   The Decision Table for the Price List Defaulting Matrix opens in Workflow Studio and shows 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 to make it active.
   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**.
   Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and 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 Customer Relationship Management.

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Before you begin
Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task
You can create cost books that define the unit costs for a set of products and a specified currency. However, only one cost book per given currency is allowed.

You can create multiple cost books for a given currency, but the first cost book that you create for a particular currency is automatically set as the default cost book. If you don't want the first cost book as the default, deselect the **Default** option. 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.
Default	Option for setting this cost book as the default cost book with the specified **Currency**.
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

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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

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Procedure

1. In the CSM Configurable Workspace, access the cost book to 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

Field	Description
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. **Note:** The **Pricing Method** is auto-populated when the product offering is selected.
Periodicity	Frequency of recurring pricing:

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Field	Description
	○ Monthly ○ Annually **Note:** The **Periodicity** is auto-populated when the product offering is selected.

4. Select **Save**.

Copy a cost book

Duplicate a cost book and its cost book lines.

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 **Pricing** > **Cost Books**.
3. Select the published cost book to be copied and select **Copy**.
   The state changes to Copy in Progress and a message indicates that the copy is starting. Each cost book line is copied asynchronously, but you can refresh the page to see the cost book lines copied. When the copy process completes, the following occurs:
   - The copied cost book is available in the Draft state and opens in a new tab.
   - Any errors that occurred during the copy process, for example a cost book line doesn't get copied, are displayed in a message in the copied cost book list.
4. Select **Save**.
   When the cost book is in the Draft state, you can add cost book lines or delete the cost book. When you finish any changes to the copied cost book, you can publish it so that it's available for use and retire the former cost book.

Control the default cost book on transaction header or header line

Set the default cost book displayed to your sales agents on the transaction header or header line for a Sales Customer Relationship Management application by using the Cost Book Defaulting Matrix.

Before you begin

Role required: sn_csm_pricing_pricelist_administrator, sn_csm_pricing_pricelist_manager

About this task

The transaction header is a record that contains general information about an entity, such as a cost book. A transaction line record contains specific information about a specific item, such as a cost book line for a certain product.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select **Cost Book Defaulting Matrix**.

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4. Select **Edit Rule**.
   The Decision Table for the Cost Book Defaulting Matrix opens in Workflow Studio and shows the inputs and the decision table for setting the conditions to display the default cost book in the header.
5. In the decision table, set the rule for displaying the default cost book:
   a. In the **Header Cost Book Type** column in the Results section, select the **Edit** icon to add the cost book that can be applied.
   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 **Currency** and set the condition to make it active.
   d. In the Results section, select the **Header Price List Type** column and select the cost book to be applied, for example a specific currency-based cost book.
6. Select **Save**.
   Review the **Validation Status** and **Validation Message** columns to see if you're missing mandatory inputs or outputs or required information. If so, enter the appropriate information and select **Save**.
   The default cost book is displayed in the transaction header or header line for the application.

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 or 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 tables.

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.

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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 Workflow Studio.
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.

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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

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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.

Configure volume pricing

Set volume pricing rules by using the Standard Price Adjustment matrix.

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 **Pricing** > **Pricing Matrices**.
3. In the Pricing Matrices list, select the Standard Price Adjustment matrix and create a new matrix version.
4. In the Context variables section of the new matrix version, select the Search icon and in the list of Context variables, select the Quantity variable.

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The Quantity variable is added to the Context variables section.

5. Select **Create Rule**.
   The Standard Price Adjustment Matrix opens in Workflow Studio and displays the inputs available and the Decision table for entering the volume pricing conditions to be applied.
6. In the Conditions section of the Decision table, do the following:

   a. Select the item to which the volume pricing adjustment is to be applied, such as **Product Offering**
   For example, if you're setting volume pricing for door sensors, select the Door Sensor product offering.

   b. Make the condition active by selecting the **Active** field and set it to true.

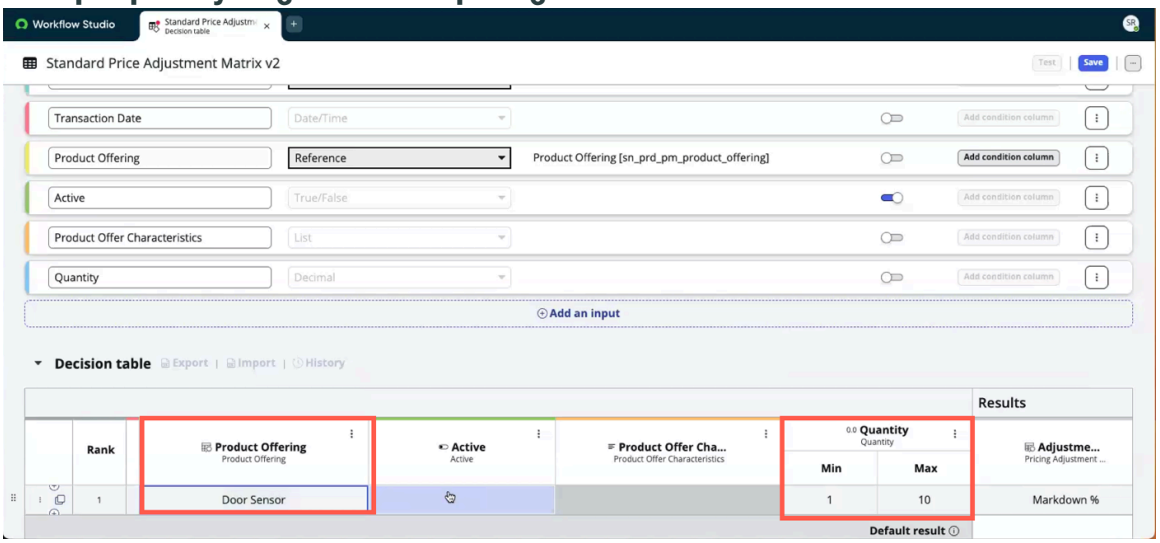
   c. Select a condition operator in the **Quantity** field and enter the quantity value to be applied.
   The following operators are available:
   - is
   - is not
   - is empty
   - is not empty
   - less than
   - greater than
   - less than or is
   - greater than or is
   - between

   For example, selecting the operator **greater than or is** and specifying a quantity value 10 indicates that the pricing adjustment applies to a quantity that is equal to or greater than 10.

   If you select the operator **between**, you specify a quantity range by entering the **Min value** and **Max value** for the range. You must set both a minimum and maximum value so that the quantity pricing adjustment applies only to the quantity of product offerings in the specified range.

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Example quantity range for volume pricing



For example, the door sensor pricing adjustment applies only to quantities ranging from 1 through 10. The pricing adjustments are not applicable to other quantity values for door sensors.

7. In the Results section, do the following:
   a. Select the **Adjustment Type** field and choose the type of adjustment, for example Markdown % or Markdown amount.
   b. In the **Adjustment Value** column, enter the adjustment amount.
   c. In the **Adjustment Description** column, enter a brief description of the adjustment, for example, Quantity adjustment for door sensors.
   d. Select **Save**.
8. Return to the version of the Standard Price Adjustment Matrix that you created and select **Save** and then **Publish** to make the matrix version active.
   The volume pricing adjustment is available to sales or order agents as they work on quotes or orders. For example, a pricing adjustment has a quantity range for a particular product, such as 1 through 10 door sensors. When a sales agent adds five door sensors to a quote, the pricing adjustment is applied. The pricing adjustment doesn't apply to quantities outside this range.

Set properties to control pricing processing

Activate or deactivate system properties that control how pricing features are processed in Sales Customer Relationship 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.

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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 ○ 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)	Set properties that optimize the processing time for pricing transactions. ○ 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**.

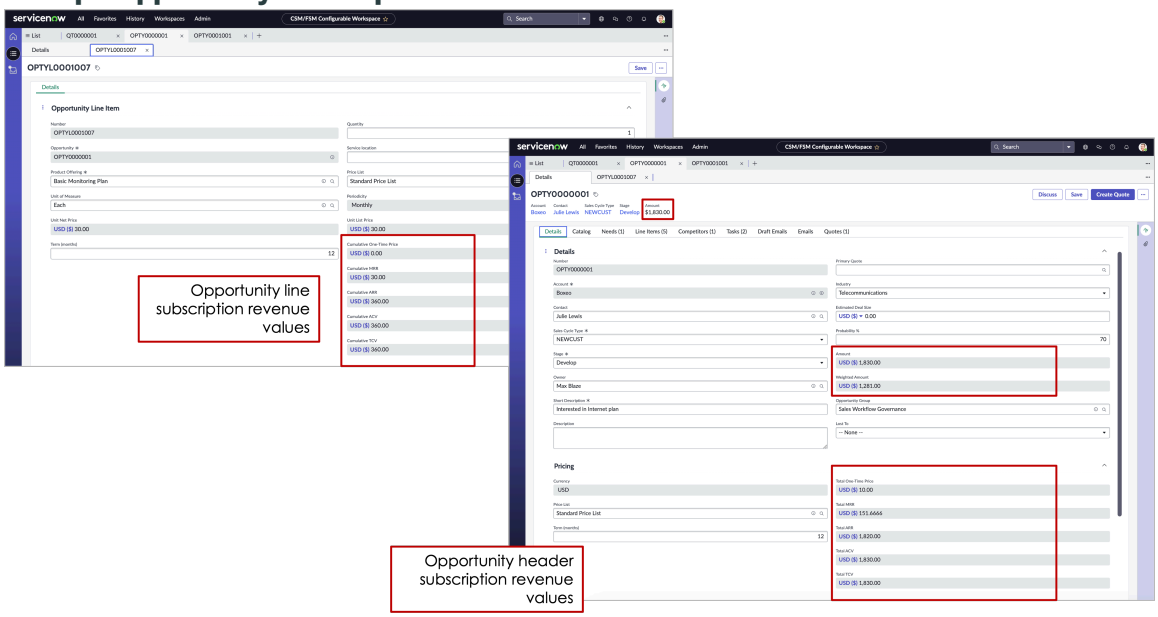
Subscription revenue metrics

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, usually at regular intervals such as monthly or annually. In Sales Customer Relationship Management, various subscription revenue amounts are calculated automatically for opportunities and quotes.

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Subscription revenue amounts are metrics that help sales agents and sales managers track and analyze the revenue impact of sales deals. Sales agents and managers can view these system-calculated revenue amounts in the pricing details for opportunities and quotes, both at the header and line levels. These revenue amounts, such as monthly recurring revenue (MRR) or annual recurring revenue (ARR), are useful for monitoring sales performance, forecasting subscription revenue, and providing relevant subscription amounts when agents engage with customers.

Example opportunity subscription revenue details



Subscription pricing metrics

In subscription pricing, common metrics for assessing subscription-based revenue include the following values and items:

Monthly Recurring Revenue (MRR)

The total revenue generated from recurring subscriptions or contracts on a monthly basis. It helps sales agents and managers assess the stability and growth of subscription-based revenue streams.

Annual Recurring Revenue (ARR)

The annual revenue generated from recurring subscriptions or contracts. It provides insights into the predictable revenue stream that can be expected from existing customers over a year.

Annual Contract Value (ACV)

The total value of a contract on an annual basis. It highlights the annual revenue impact of a deal and facilitates comparison with other contracts or revenue streams.

Total Contract Value (TCV)

The total value of a contract over its entire duration, including recurring and one-time charges. It provides visibility into the overall value of a deal and its impact on the organization's financial performance.

Term

The duration or period of a subscription or contract, in months, such as 10 months or 24 months. In Opportunity Management, agents can enter a Term value before adding line items. In Quote Management, when agents enter a Term value and the contract start date, the system uses the term value and start date to auto-calculate

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the contract end date. If an agent changes the contract end date, the system recalculates the Term value.

For products with monthly periodicity, the per-day price (pro-rate multiplier) is based on the Unit list price/number of days in the month. For a product with annual periodicity, the per-day price (prp-rate multiplier) that is multiplied against the decimal fields is the Unit price/365 days or 366 days if the year is a leap year.

How subscription pricing revenues are calculated

Product offers for products and services contain basic pricing information, such as list price and pricing method (either one-time or recurring periodicity). When agents add product lines to opportunities and quotes, the system uses basic pricing information and product line details to auto-calculate the various revenue subscription values. These values are calculated and displayed in both the header pricing details and line pricing details.

For example, when an agent adds an opportunity line, the system calculates the Cumulative Monthly Recurring Revenue (MRR) amount using the unit net price and quantity of the product. The system then sums up the cumulative revenue to the parent line in the opportunity and displays the cumulative MRR in the pricing details of the opportunity header.

When agents use the configuration UI to add customizable products to quotes, the configurator interface displays the calculated subtotal values such as the Cumulative Monthly Recurring price for the root product offer of the line item.

The following tables describe the subscription pricing revenue amounts for opportunities and quotes and how they're calculated.

Opportunity line subscription revenue metrics

Opportunity line subscription metric	Description	Calculation
Unit net price	Price of a single unit.	Unit list price - pre adjustments
Cumulative one-time price	One-time price of the opportunity line and any child lines.	Unit net price * Quantity
Cumulative MRR	Cumulative monthly recurring revenue of the opportunity line and any child lines. Not calculated for one-time products.	• If the periodicity is monthly: Cumulative MRR = Unit net price * Quantity • If the periodicity is annual: Cumulative MMR = (Unit net price/12 months) * Quantity
Cumulative ARR	Cumulative annual recurring revenue of the opportunity line and any child lines. Not calculated for one-time products.	Cumulative MRR * 12 months
Cumulative ACV	Cumulative annual contract value of the opportunity and any child lines.	Cumulative One-time price + Cumulative ARR

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Opportunity line subscription revenue metrics (continued)

Opportunity line subscription metric	Description	Calculation
Cumulative TCV	Cumulative total contract value of the opportunity and any child lines.	Cumulative One-time price + (Cumulative MRR * Term months)

Opportunity header subscription revenue metrics

Opportunity header subscription metric	Description	Calculation
Amount	The total contract value.	Total contract value if there are opportunity line items. If no line items exist, this amount is copied from the Estimated Deal Size.
Weighted amount	Value that represents the potential size of a deal.	Amount * Probability
Total One-Time Price	Sum of all the cumulative one-time prices of the opportunity line items.	Cumulative one-time price of the top-level parent
Total MRR	Total monthly recurring revenue.	Sum of the Cumulative MRR values of the top-level parent.
Total ARR	Total annual recurring revenue.	Sum of the Cumulative ARR of the top-level parent.
Total ACV	Total annual contract value.	Sum of the Cumulative ACV of the top-level parent.
Total TCV	Total contract value.	Sum of the Cumulative TCV of the top-level parent.

Quote line subscription revenues

Quote line subscription metric	Calculation
Monthly recurring price	• If periodicity is monthly: Monthly recurring price = Unit net price * Quantity • If periodicity is annual: Monthly recurring price = (Unit net price/12) * Quantity
Annual recurring price	Monthly recurring price * 12 months
Cumulative net price	Unit List Price - Total adjustment
Cumulative one time price	One-time price for the line item + (if parent line item) One-time price for all child line items
One-time price	One-time price for the line item.

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Quote header subscription pricing

Quote header subscription metric	Calculation
Term	The duration in months for subscription or contract. If an opportunity exists, the value comes from the opportunity. Otherwise, the default term is 12 months.
Total one-time price	Sum of all parent lines.
Total monthly recurring price	Sum of the Cumulative monthly recurring price of all root parent lines.
Total annual recurring price	Sum of the Cumulative annual recurring price of all root parent lines.
Total amount	Sum of the Cumulative net price of root parent lines.

Order line subscription revenue metrics

Order line subscription metric	Calculation
Term	Contract end date - Contract start date
Contract start date	The start date of having access to the service or product
Contract end date	The end date of having access to the service or product
Unit adjustment	Total adjustment/Quantity
Monthly recurring price	• If periodicity is monthly: Monthly recurring price = Unit net price * Quantity • If periodicity is annual: Monthly recurring price = (Unit net price/12) * Quantity
Annual recurring price	If pricing method is recurring: Monthly recurring price * 12 months
Cumulative monthly price	Monthly recurring price for the line + (if parent line item) sum of all monthly recurring price of immediate child lines
Cumulative annual price	Cumulative monthly recurring price * 12
Cumulative Net Price	[One time price + (Monthly recurring price * Term)]+(if parent line item) sum of all Cumulative net price for immediate child lines

To learn more about the revenue metrics in opportunity details, see Add and view the details of an opportunity and Add line items to an opportunity.

To learn more about the revenue metrics in quote details, see Add and view details of a quote.

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Configuring matrix validation rules

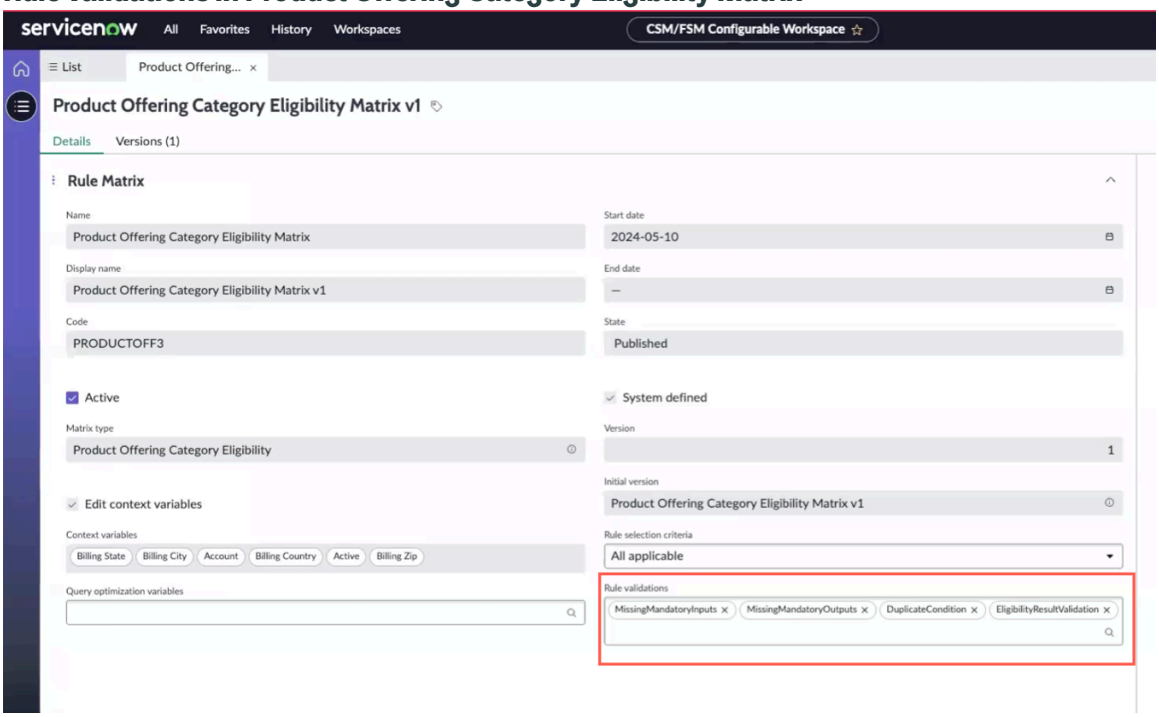
As a product catalog admin or pricing admin, you can manage the system-defined matrix validation rules that automatically check the mandatory rule inputs or outputs in matrix decision tables. You can also define your own custom validations.

The product eligibility and pricing matrices included with the Product and Pricing Rules application have system-defined matrix validation rules, which are identified in the Details tab for each matrix. Each validation rule has a validation definition, which is a script that identifies the context variables to be validated in the matrix decision table and the corresponding error or warning messages to be displayed. The validations are run when you save your matrix decision row changes. The **Validation Status** field indicates whether the change is valid. If the change is not valid, error or warning messages are displayed in the **Validation Message** columns of the decision table.

Some system-defined validation rules are applicable to all decision tables, while others apply to only certain types of matrices:

- DuplicateCondition: Checks for duplicate conditions in decision rules.
- MissingMandatoryInputs: Checks for missing required inputs.
- MissingMandatoryOutputs: Checks for missing required outputs.
- EligibilityResultValidation: Checks the product eligibility results.
- MandatoryCostBookForTypeExistingCostBook: Checks the cost book type.
- MandatoryPriceListForTypeExistingPriceList: Checks the price list type.
- ProductOfferCharsWithoutProdOffer: Checks for product offer characteristics without product offering.

Rule validations in Product Offering Category Eligibility Matrix



From the Details tab for a matrix, you can also run rule validations for the entire matrix by selecting the **More actions** icon and selecting **Validate rule**.

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Update validation settings in a matrix

Change the rule validation checks for a matrix. These checks run automatically when you save changes made to the matrix decision table.

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 **Context Rule Management** > **Rule Matrices**.
3. Select the matrix to update.
4. In the **Rule validations** field, change the rule validation.
   - To add a validation rule, select the Search icon and select the rule validation.
   - To delete a validation, select the X in the validation pill.
5. Select **Save**.

Create a custom validation definition

Provide a script that validates a context rule input or output in the decision table for a pricing or product eligibility matrix.

Before you begin
Role required: admin

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Context Rule Management** > **Validation Definitions**.
3. Select **New**.
4. In the **Script** field, enter the custom script that defines the error check, warning messages, and error messages for the validation.
5. If the decision condition won't be active by default, select **Inactivate decision condition**.
6. Enter the **Name** of the validation definition.
7. Select **Save**.
8. Associate the custom definition to a rule matrix.
   a. Navigate to **Context Rule Management** > **Matrix Validations**.
   b. Select **New**.
   c. In the **Matrix type** field, select the rule matrix to which this custom validation definition applies.
9. Select **Save**.

Create a matrix version

Create a version of a published price or product eligibility 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

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About this task

You can create a version of a published pricing matrix (Standard Price Adjustment Matrix, Price List Defaulting Matrix, Cost Book Defaulting Matrix, or Configuration Component Price Adjustment Matrix) and a product eligibility 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 list of matrices to see the new matrix version.

Create a custom context variable

Create custom context variables to represent product or non-product characteristics that can be used by pricing admins to apply control different pricing features, such as pricing adjustments, or product catalog admins to set product offering eligibility rules.

Before you begin

Before creating a custom 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 Product Catalog Management and Pricing Management and also any custom 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 and product catalog administrators can use in rule matrices to control pricing features or product offering eligibility. 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.

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You create the variable name and define the variable type, so that the variable can be used in a decision rule for a rule 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 reference.
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 rule matrices.

5. Select **Save**.
The tab (related list) for the **Type** that you selected in Step 4 and the **Variable Mapping** tab are displayed.

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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 Customer Relationship 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 Customer Relationship 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 from external sources that control pricing logic used in the Pricing Management feature of the Sales Customer Relationship Management (Sales CRM) applications.

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To access the available extension points, navigate to **All** > **Scripted Extension Points** and in the Extension Points list, select the desired extension point to view it.

Pricing Management extension points

Extension point	Description
sn_csm_pricing.DefaultCostBookExtensionPoint	Customize the logic for determining the default cost book used by the calling application, such as Quote Management. This extension point changes the default cost book logic for both the header and line of the calling application.
sn_csm_pricing.DefaultPriceListExtensionPoint	Customize the default price list logic used by the calling Sales CRM 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.
sn_csm_pricing.ListPriceExtensionPoint	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.
sn_csm_pricing.AttributeAdjustmentExtensionPoint	Customize the logic that determines the attribute adjustments for a product offering. You can extend the pricing engine logic without using the Attribute Adjustment table to fetch the adjustment values.
sn_csm_pricing.PricingAdjustmentsExtensionPoint	Customize the logic that determines price adjustments for a product offering. Enables administrators (partner implementers) to extend the pricing engine logic by not relying on the Standard and Component Configuration Rule matrix to fetch the adjustment values.

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 target production instance. Each process involves a separate set of steps.

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Before exporting and importing pricing entities

Before you export your pricing entities to a target instance, note the following prerequisites:

Import product-related entities to your target instance

Verify 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 the update set for decision table changes to your target instance before exporting the associated pricing matrix

If you have a new version of a pricing matrix that has decision table changes, such as a reference to a new product offering, ask your admin to export the system-generated update set that includes the decision table changes to your target instance. Next, you export the new pricing matrix, then import the pricing matrix to your target instance. For more information, see Export pricing entities and Import pricing 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

Before you export a new version of a pricing matrix that has an updated decision table, ask your admin to export the system-generated update set that includes the updated decision table, to the target instance.

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.

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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 pricing 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.
   - If you have new versions of pricing matrices with updated decision tables that reference new product offerings, ask your admin to export the system-generated update set that includes the updated decision tables.

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. And if you're importing a new price list matrix, your admin must have imported the associated decision table to your target instance in a system-generated update set.

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.

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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.

   Note:
   During the import of a pricing matrix on the target instance, an import post script associates the reference entities in the decision table that was imported in an update set to the appropriate pricing matrix.

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 was 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.

Configuring agent tools in Sales Customer Relationship Management

The applications in Sales Customer Relationship Management share common features and tools for agents.

This section describes common features that you can configure for your agents, such as location-based transactions.

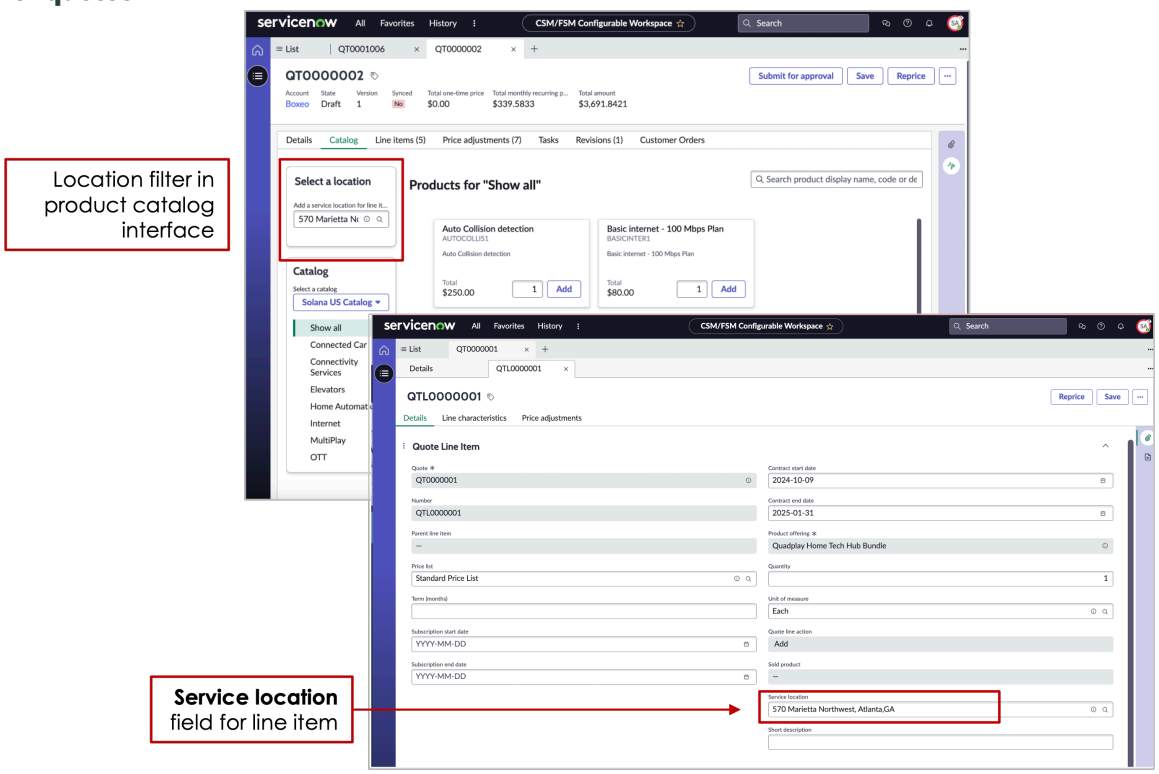
Configuring location-based product transactions

In Sales Customer Relationship Management, agents can create opportunities, quotes, and orders tailored to customer location. These transactions are called location-based product transactions.

When the product offerings and services available to customers vary based on location, your agents can use a location filter in the product catalog UI to select a service location and view only the products and services appropriate for that location. Agents can then add the appropriate products to an opportunity, quote, or order. Agents can also copy products and services from one location to another within the same transaction, which eliminates the need to create another opportunity, quote, or order for each location.

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Location filter in the product catalog UI and service location in the line item view for quotes



How location-based transactions work

Admin and product catalog admin configuration

Admins activate location-based transactions by enabling the *`sn_sales_common.enable_location_based_transactions`* system property.

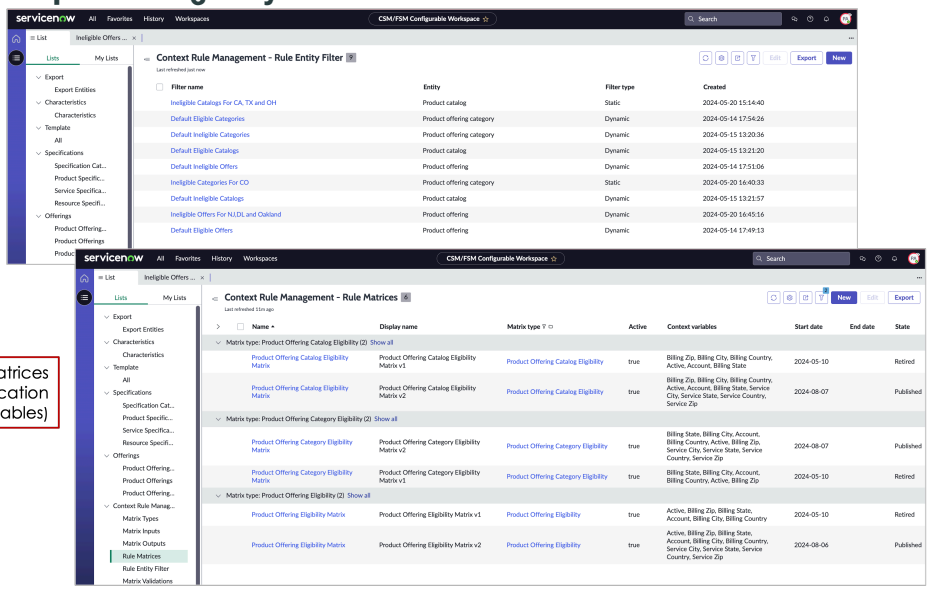
Product catalog admins use the product eligibility rule entity filters to identify eligible and ineligible product entities (catalogs, categories, and product offerings). They also set up decision rules in product eligibility matrices, to specify the context variables, such as billing state or the service location variables (introduced in the November 2024 release), for controlling the display of eligible catalogs, categories, or product offerings.

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Rule entity filters and product eligibility rule matrices

Rule entity filters for product eligibility

Product eligibility matrices (v2 provides service location context variables)

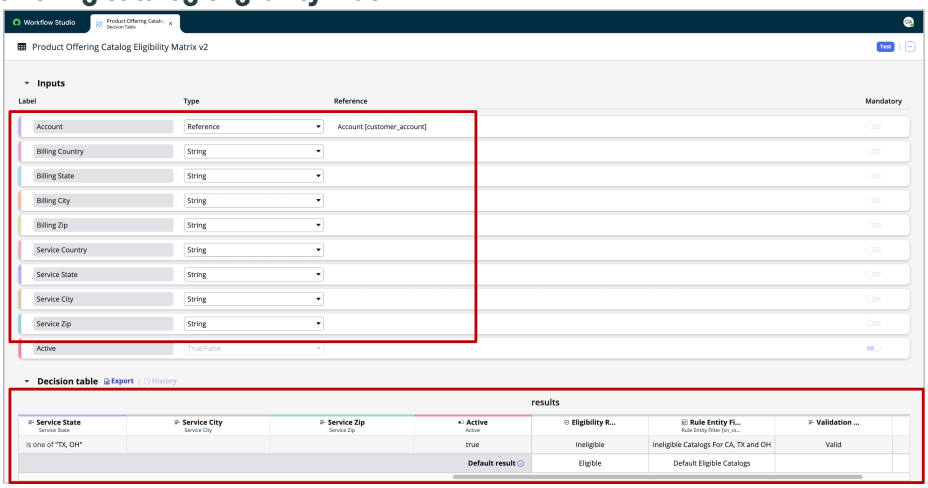


In the following example of the Product Offering Catalog Eligibility matrix, a rule entity filter for ineligible catalogs and the context variable, service state, are used to filter the product catalog displayed.

Example product offering catalog eligibility matrix

Context variables for product eligibility

Decision rule for product entity



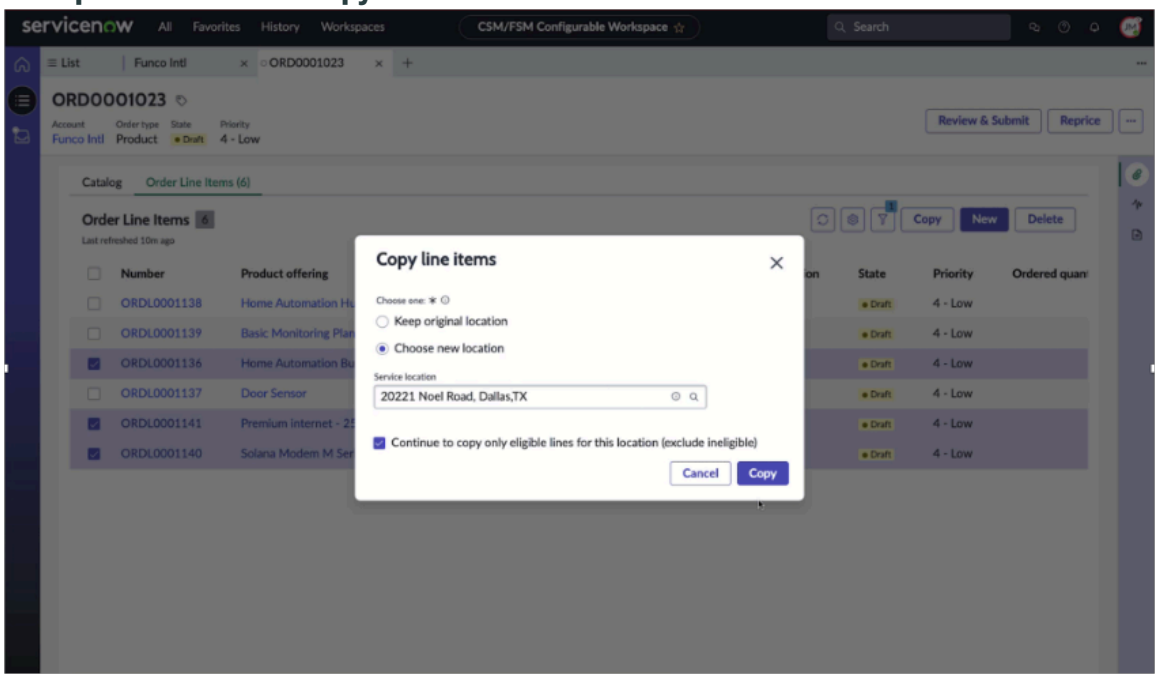
Agent experience for location-based transactions

When agents specify a service location, the product catalog UI displays the eligible catalog, categories, or offerings for that location, depending on the product eligibility entities configured. When they select a simple or fixed product, the line item is created automatically for the specified location. If they select a configurable product, they use the product configurator to customize the product options. A line item is created automatically when they save the product configuration.

Your agents can then copy line items to another location in the same transaction (opportunity, quote, or order). They can indicate that only eligible line items be copied to the specified location.

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Example order line item copy



For details on how agents add products to an opportunity, quote, or order by location, see the following:

- Use location filter to add opportunity line items.
- Copy opportunity line items to a location.
- Filter catalogs by location in a quote.
- Copy locations for quote line items.
- Filter product catalog by location.
- Update product locations at the order line level.

Setting up location-based transactions

Admins and product catalog admins complete the following configuration tasks to set up location-based transactions.

Location-based transaction configuration tasks

Step	Description	Role
Activate location-based transactions	Enable the *sn_sales_common.enable_location_based_transactions* system property.	Admin
Create rule entity filters	Define the rule entity filters that make catalogs, categories, and product offerings either eligible or ineligible for display.	Product catalog admin
Define product eligibility rules	Set the product eligibility rules by selecting the context variables, such as the service location context variables, that control the display of product catalog, category, or offerings.	Product catalog admin

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Activate location-based transactions

Turn on location-based transactions for opportunities, quotes, and orders by using the *sn_sales_common.enable_location_based_transactions* system property.

Before you begin
Role required: admin

About this task
The *sn_sales_common.enable_location_based_transactions* system property enables your agents to select a customer location and view only the eligible products for that customer location when adding product lines to an opportunity, quote, or order. This feature also enables agents to copy line items to another location within the same transaction (opportunity, quote, or order).

Procedure
1. Navigate to **All** and in the filter enter `sys_properties.list`.
2. Open the *sn_sales_common.enable_location_based_transactions* system property.
3. In the **Value** field, enter `true`.
4. Select **Update**.
   The location filter is displayed in the product catalog interface. Agents can use the filter to select a location when adding product lines to an opportunity, quote, or order. The catalog displays the eligible product offerings for the location. After adding products from the catalog, agents can then copy selected products (line items) to another location within the same transaction, without having to create another opportunity, quote, or order for a different customer location.

What to do next
Define the product eligibility rule filters and matrices that control the product offerings displayed by location.

Setting up the product configurator

Control the product options displayed in the product configurator interface by using the Open State Management API framework.

Configuration overview
As an admin, you can manage the configuration states and configurator nodes displayed in the product configurator by using the Open State Management API framework and open state management extension points.

Open state management

The open state model is a programmatic framework in the Configuration State Model API, which lets you program variations in product options that appear in the product configurator in Sales Customer Relationship 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. You can also optionally script information messages along with changing the state of the node. These messages display contextually in the product configurator user interface. Various helper API methods are available for reading and setting states on any node, eliminating the need for extensive JSON scripting.

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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.
Allow quantity to be set for products	Some products might have different default quantity values. Allow agents to configure the quantity as long as the value is within the bounds of a minimum quantity and maximum quantity allowed for that product.
Allow only certain characteristic selections to be made	Certain product selections require a particular characteristic value to be chosen. For example, upon selection of the Ultimate Internet Plan, the connectivity speed that can be chosen is 5G.

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

Node states

Nodes in the product configurator display product relationship groups, child products, and characteristic options. Nodes can have the following states:

Visible - Yes (make node visible) or No (make node invisible)

Configurations that are visible or not visible to the agent in the product configurator. Options might not be visible if they're incompatible with other selections made by the agent. For example, for a particular car wheel size, incompatible tire options are not visible.

Editable - Yes (show node and make it selectable) or No (show node but make it unselectable)

Configurations that are editable or not editable by the agent in the product configurator. Agents can personalize certain aspects of the product while maintaining constraints that are necessary for the product. For example, for a specific car model, only compatible exterior colors are editable.

Quantity - Visible (Yes/No), Editable (Yes/No)

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Configurations that set quantity on a product, enforce rules related to quantity, and show informational and error messages related to quantity at the appropriate node.

Checked - Yes (show node selections) or No (make node selections invisible)

Configurations that show the configuration options for selection based on the context.

Value - Visible (Yes/No), Editable (Yes/No)

Configurations that set a value for a characteristic, enforce rules related to the characteristic, and show informational or error messages related at the appropriate node.

Note:
Agents can choose to set messages at a node level to provide justification for a state change.

Events

Manage node states using the Configuration State Model API Framework. Activate these states by using the following 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. These states can be set programmatically in one of the following ways: on-load, during selections, or just before the instance is synchronized back to the transaction

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)`: Returns javascript object of the node for the specified node path if it exists.
- `getNodeDetails(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(True/False)`
  - `setEditable`: True/False at all levels

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- `setEditable(True)`
- Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setVisible(true, “This is a sample
 message for setVisible”);
newHandler.setEditable(false, “This is a sample
 message for setEditable”);
```

- Set the quantity for offers and specifications. The nodePath determines the product, and the value is the quantity to be set.
  - `setQuantity(value);`
  - Implementation example:

```
var newHandler = configInstance.getNode(nodePath);
newHandler.setQuantity(value, “This is a sample
 message for setQuantity”);
```

- Set the configuration options to see what is being selected.
  - `setChecked (value); True/False`
  - Implementation example:

```
var nodePath =
 “QUADPLAYHO1/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN”
var newHandler = configInstance.getNode(nodePath);
var newHandler.setChecked(true, “This is a sample
 message for setChecked”)
```

- Set the value for a characteristic node where the input type is a single line of text.
  - `setValue( value);`
  - Implementation example:

```
var nodePath =
“QUADPLAYHO1/OPTIONALPRODUCTS/CONNECTEDC2/CONNECTED
C1/VIN”
var newHandler = configInstance.getNode(nodePath);
newHandler.setValue(“9TKN332”, “This is a sample
 message for
setValue”);
```

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 the 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.

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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, by navigating 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	Provides methods used to return to the updated config instance.

Using the OpenStateModelExtension point

When you install Configuration Rules Management, you can use the OpenStateModelExtension point and the `canProcess()` method to set the custom logic to run either the configuration rules implementation or the open state implementation:

- If you want to use open state rather than configuration rules, use the OpenStateModelExtension point and the `canProcess()` method to return true for the open state implementation and turn off the configuration rules implementation.
- If you're using open state but want to use configuration rules, use the OpenStateModelExtension point and the `canProcess()` method to return true for the configuration rules implementation and turn off the open state implementation.

Assign user roles in Sales Customer Relationship Management applications

The Sales Customer Relationship Management (Sales CRM) 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 users perform in your organization.

Overview of roles

Roles define the functions available to users of the Sales CRM applications, including:

- Product Catalog Management
- Pricing Management
- Lead Management
- Opportunity Management
- Quote Management
- Sales Agreement Management
- Order Management

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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.

Lead Management roles

The roles in the following table apply to Lead Management.

Role	Description
Lead Agent [sn_customerservice.csm_workspace_user]	Identifies, nurtures, and converts leads into opportunities. Creates, reads, updates, and deletes leads. Has access to CSM Workspace. I
Sales Agent [sn_sales_common.sales_manager]	Role that has access to CSM and lead entities.
Sales Operations Specialist [sn_sales_common.sales_ops_specialist]	Enhances efficiency and accuracy in sales operations. Read access to lead entities. Configures sales processes in an organization.
Lead Viewer [sn_prd_pm.product_catalog_viewer] [sn_csm_ctxrul_mgt.context_variable_viewer] [sn_csm_ctxrul_mgt.rule_matrix_viewer]	Granular role that has access to view product catalog entities such as product offerings.
Lead Writer	Read access to all lead tables such as header and line items.

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.

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Role	Description
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.
Sales Operation Specialist [sn_sales_common.sales_ops_specialist]	Enhances efficiency and accuracy in sales operations. Configures sales processes in sales operations.

Sales Agreement Management roles

Role	Description
Sales Agent, Sales Manager, Data Viewer sn_sales_agmt_core.sales_agreement_viewer	Read operations on sales agreements, sales agreement lines, and related data such as characteristics, price lists, and other tables.
Sales Agent, Sales Manager sn_sales_agmt_core.sales_agreement_writer	Create, read, and update operations on sales agreements and sales agreement lines.

Product Catalog Management roles

The roles in the following table apply to Product Catalog Management.

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.

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Pricing Management roles

The roles in the following table apply to Pricing Management.

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.
Price List Writer [sn_csm_pricing.pricelist_writer]	Granular role that has 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.
Sales Agreement Price List Writer [sales_agreement_pricelist_writer]	Granular role that has read and create access to pricing entities. Create access is granted only through back-end workflows. Write access only for Sales Agreement price lists. Inherited within Sales Agreement Writer role.
Price List Viewer [sn_csm_pricing.pricelist_viewer]	Granular role that has 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 tables to control and manage access to the application features for Order Management, Service Order Management, and Fallout Management.

Order Management roles

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, but they can edit some fields on the product order tasks. After the Order Fulfillment Manager approves an order, the agent performs these fulfillment

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Order Management roles (continued)

Role	Description
	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. **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.
Fulfillment Viewer [sn_ind_tmt_orm.fulfillment_viewer]	Granular role that has read access to fulfillment tables: order tasks, domain orders, product orders, resource orders, and service orders.
Fulfillment Writer [sn_ind_tmt_orm.fulfillment_writer]	Granular role that has 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

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

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Service Order Management roles (continued)

Role	Description
	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 tasks. This role also includes the Order Viewer [order_view] role.

Fallout Management roles

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.

Configuring the Business Portal

Admins can configure the Business Portal (sn_b2b_portal) so that customer can browse products and create orders in Sales Customer Relationship Management.

Configuration overview

1. Install the following plugins in the given order using the Application Manager to set up the Business Portal:
   a. Order Management Portal: sn_ord_mgmt_portal
   b. Product Catalog Management Portal: sn_prd_pm_portal
   c. Customer Service Portal: sn_csm_portal

      Note:
      The Business Portal application (sn_b2b_portal) is automatically installed when you install the Customer Service Portal.

   d. UI Components for Customer Portals: sn_ciwf_ui_cmpnt
   e. Sales Cart plugin: sn_sales_cart
2. Enable the Business Portal

   Enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.

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3. (Optional) Install apps for self-service order case management

   Install the necessary plugins based on the self-service options that you want to offer customers for managing order cases on the Business Portal.

Enable the Business Portal

Admins can enable the Business Portal (sn_b2b_portal) so customers can browse products and create orders.

Before you begin

Role required: admin

About this task

To set up the Business Portal and Sales Customer Relationship Management self-service enhancements, first install the Business Portal plugins, which are available in the app store.

See Configuring the Business Portal for more information.

Procedure

1. In the CSM Configurable Workspace, select **All** > **Portals**.
2. Select **Business Portals**.
3. Clear the **Inactive** box.
4. Select **Save**.
   The Business Portal is enabled.

Post-upgrade order migration for the Business Portal

Migrate draft proxy order carts to the new sales cart to avoid having your customers lose products they added to their carts on the Business Portal

Before you begin

Ensure that the Sales Cart application has been installed. For more information, see Install Sales Cart.

Role required: admin

About this task

Note:
If you have used the Business Portal and are upgrading to the Zurich release, you must run the *`Migrate proxy orders to sales cart`* scheduled job after installing the Sales Cart application. This job migrates the draft proxy order carts to the new sales cart and prevents your customers from losing products added to their carts on the Business Portal.

The *`Migrate proxy orders to sales cart`* scheduled job performs the following actions:

- Migrates items from customers' existing cart to the new sales cart
- Creates cart-related records in the Sales Cart tables
- Updates the value of the *`sn_sales_cart.show_cart_migration_msg`* property to false

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Until you run the this job, the following message is displayed to your customers on the Business Portal:

```
A system update cleared your cart. Please contact your
 administrator for help.
```

Procedure

1. Select **All** > **System Definition** > **Scheduled Jobs**.
2. On the Scheduled Jobs page, enter `Migrate proxy orders to sales cart` in the search field.
3. Select the job.
4. On the Scheduled Script Execution page, select **Execute Now**.

Install Sales Cart

You can install the Sales Cart plugin (sn_sales_cart) if you have the admin role.The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Review the Sales Cart listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with the Sales Cart plugin (sn_sales_cart):

- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Sales Cart.

Procedure

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

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

A sample logo is applied to the sales cart PDF by default. To customize and add your logo, see Add a logo to the sales cart PDF.

Add a logo to the sales cart PDF

Customize and embed your company logo in sales cart summary PDFs to ensure consistent branding and alignment with corporate identity standards.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the **Name** search field, enter `db_image` table and select the Images table.
3. On the Tables details page, select **Show List** from the Related Links section.
4. In the **Name** search field, enter `sn_sales_cart.sales_cart_download_logo.png` and select the record.
5. If a message appears about the application scope, select **here** to be able to edit the record.
6. Update the logo by selecting **Update** next to the Image field.
   a. Select **Update** next to the **Image** field.
   b. Select the **Choose File** button and select the image file on your computer that you want to use.
   c. Select **OK**.
7. On the Images page, verify that your logo file uploaded successfully.

   Note:
   You might have to change the application scope again.

8. Select **Update**.

Modifying the data retention and table cleanup policy for the Sales Cart application

A default data retention and table cleanup policy automatically deletes records from the Sales Cart application based on predefined conditions. You can modify these conditions to match your organization's policies.

By default, records in the complete state are deleted from the Sales Cart [sn_sales_cart] table if they meet either of the following conditions:

- Records older than six months
- Records that haven't been updated for more than six months

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Modify the data retention and table cleanup frequency depending on your expected load and volume. For more information, see Modify data retention policy for ATF test results.

Related topics

- Table cleanup
- Autoflush form

Modify terms and conditions for the sales cart

Add order checkout terms and conditions in the CartTermsAndCo document template block for your Business Portal.

Before you begin

Role required: admin

About this task

The CartTermsAndCo document template block in the Sales Cart Demo Template and Sales Cart Terms and Conditions Default document templates is used for displaying terms and conditions in the cart summary PDF and while checking out respectively.

Procedure

1. Navigate to **All** > **Document Templates** > **Document Template Blocks**.
2. Select **CartTermsAndCo**.
3. Select the record from the Document Template Block Contents related list.
4. If a message appears about the application scope, select **here** to be able to edit the record.
5. Add your terms and conditions in the Body section.
6. Select **Update**.

Related topics

- Document Templates
- Create block content in Document Templates

Installing apps for self-service order case management on the Business Portal

Install the necessary plugins based on the self-service options that you want to offer customers for managing order cases on the Business Portal.

The apps that must be installed from the ServiceNow Store to enable your customers to create and view order cases from the Business Portal:

- Order Case Self Service [sn_ord_case_ss]
- Order Case Playbook [sn_ord_case_pb]

These plugins have the following dependencies:

- Customer Service Portal [com.snc.customer_service_portal]
- Order Operations Case Management [sn_order_case]
- Playbooks for Customer Service Management [sn_csm_playbook]

If you want your customers to be able only to view order cases in the Business Portal, you do not need to install the Order Case Playbook [sn_ord_case_pb] plugin and the Playbooks for Customer Service Management [sn_csm_playbook] plugin is not necessary.

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You must also activate the Business Portal to make it accessible for your customers. The Business Portal is inactive by default. For more information, see Configure Business Portal.

Install Order Case Self Service

You can install the Order Case Self Service application (sn_ord_case_ss) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Order Case Self Service application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Note:
Demo data is unavailable with the Order Case Self Service application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Order Case Self Service application (sn_ord_case_ss) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Install Order Case Playbook

You can install the Order Case Playbook application (sn_ord_case_pb) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Order Case Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

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About this task

Note:
Demo data is unavailable with the Order Case Playbook application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Order Case Playbook application (sn_ord_case_pb) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Configure Partner Relationship Management

Install the PRM (com.snc.partner_relationship_management) application from ServiceNow® Store to enable enterprises to hire partners and improve their sales cycles.

Admins and users with various roles, such as Enterprise partner admin (sn_prm.enterprise_partner_admin), Enterprise partner agent (sn_prm.enterprise_partner_agent), and so on must complete the following configuration tasks to set up the Partner Relationship Management application.

Set up PRM

This table describes the configuration tasks required for Partner Relationship Management and their descriptions.

Task	Description	Role
Install Partner Relationship Management	Install the Partner Relationship Management application from ServiceNow Store.	admin
Roles and components of Partner Relationship Management	Assign functional roles to different PRM entities.	admin
Data model for Partner Relationship Management	Configure and add data to the different tables that are installed with PRM.	• admin • Enterprise Partner admin (sn_prm.enterprise_partner_admin)

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Install Partner Relationship Management

Install the Partner Relationship Management plugin (com.snc.partner_relationship_management), along with the demo data and installations that are related to 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 must 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 Partner Relationship 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 Partner Relationship Management application (com.snc.partner_relationship_management) using the filter criteria and search bar.
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 Partner Relationship Management.
4. If you want to install demo data, do one of the following depending on your entitlements.

Result

You have successfully installed the Partner Relationship Management application.

Related topics

Roles and components of Partner Relationship Management

Data model for Partner Relationship Management

Roles and components of Partner Relationship Management

The Partner Relationship Management application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between enterprises and channel partners.

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The PRM plugin (com.snc.partner_relationship_management) comes with a set of functional and granular roles, each with varying levels of access to raise and address queries.

The PRM application provides access and permissions to users part of both the enterprise and the channel partner ecosystem.

Functional and granular roles

Functional roles help provide authorized related parties access to enterprise and channel partner members. A granular model helps to protect data by granting the required level of access to the relevant enterprise or channel partner entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine users' access to certain information.

You can set granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve the customer experience.

Roles and descriptions

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

Functional roles

List of functional roles and their descriptions.

Role	Description	Contains roles
Enterprise Partner Admin (sn_prm.enterprise_partner_admin)	A user who is an admin for the partner enterprise.	• sn_service_org.writer • sn_prm.channel_partner_writer • sn_prm.partner_program_writer • sn_prm.partner_program_rel_writer
Enterprise Partner Relationship Manager (sn_prm.enterprise_partner_rel_manager)	Contributor who belongs to an enterprise and is responsible for managing cases associated with the partner hierarchy.	• sn_bus_loc.location_relationship_manager • sn_prm.partner_data_viewer
Enterprise Partner Agent (sn_prm.enterprise_partner_agent)	Fulfiller who belongs to an enterprise and is responsible for fulfilling partner cases.	• sn_customerservice_agent • sn_prm.partner_data_viewer
External Partner Manager (sn_prm.external_partner_manager)	Contributor who belongs to a partner entity and is responsible for reporting cases associated with their partner hierarchy on the portal.	• sn_customerservice.svc_location_manager_c • sn_prm.partner_data_viewer
External partner Associate (sn_prm.external_partner_associate)	Contributor who belongs to a partner entity and is responsible for reporting	• sn_customerservice.service_organization_co • sn_prm.partner_data_viewer

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Functional roles

List of functional roles and their descriptions.

(continued)

Role	Description	Contains roles
	cases associated with their partners on the portal.	

The following table lists the granular roles installed with Partner Relationship Management.

Granular roles

List of granular roles and their descriptions.

Role	Description	Inherited roles
Channel partner writer (sn_prm.channel_partner_writer)	This role provides granular edit access to the channel partner table.	Partner Data Viewer (sn_prm.partner_data_viewer)
Partner Program Writer (sn_prm.partner_program_writer)	This role provides granular edit access to the partner program table.	Partner Data Viewer (sn_prm.partner_data_viewer)
Partner Program Relationship Writer (sn_prm.partner_program_rel_writer)	This role provides granular edit access to the partner program relationship table.	Partner Data Viewer (sn_prm.partner_data_viewer)
Partner Data Viewer (sn_prm.partner_data_viewer)	This role provides granular read access to the channel partner, partner program, and partner program relationship tables.	NA

Related topics

Install Partner Relationship Management

Data model for Partner Relationship Management

Add responsibilities to PRM roles

A responsibility describes a role or function that supports a user. Use responsibility definitions to create relationships between any two partner entities.

Before you begin

Role required: sn_prm.enterprise_rel_manager, sn_prm.external_partner_associate, or sn_prm.external_partner_manager

About this task

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

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Related parties and their default responsibilities

List of role types and their associated default responsibility.

Type	Default Responsibility
Enterprise Partner Relationship Manager [sn_prm.enterprise_partner_rel_manager]	Location Relationship Manager [sn_bus_loc.location_relationship_manager]
External Partner Associate [sn_prm.external_partner_associate]	Location Contributor [sn_customerservice.service_organization_contributor]
External Partner Manager [sn_prm.external_partner_manager]	Location Manager Contributor [sn_customerservice.svc_location_manager_contributor]

Note:
The default responsibilities are automatically installed with the Business Location plugin (com.snc.business_location).

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Channel Partner**.
2. Open a channel partner record and add an external staff member or an enterprise partner relationship manager based on your requirement.

Result

An external staff member or an enterprise partner relationship manager is registered.

Data model for Partner Relationship Management

The Partner Relationship Management data model provides a framework to map the relationship between channel partners and programs.

Add data in the Channel Partner [sn_prm_channel_partner] and Partner Program [sn_prm_partner_program] tables and create a relationship between the two tables in the Partner Program relationship [sn_prm_partner_program sn_prm_partner_program_relationship] table.

Configuration tasks for PRM data model

List of tasks and descriptions for the Partner Relationship Management tables.

Task	Role	Description
Configure Channel Partner table	• Enterprise admin (sn_prm.enterprise_partner_admin) • Channel partner writer (sn_prm.channel_partner_writer)	Manage information related to channel partners.

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Configuration tasks for PRM data model

List of tasks and descriptions for the Partner Relationship Management tables.

(continued)

Task	Role	Description
Configure Partner Program table	• Enterprise admin (sn_prm.enterprise_partner_admin) • Partner program writer (sn_prm.partner_program_writer)	Enable channel partners to participate in structured programs to build customer relationships.
Configure Partner Program Relationship table	• Enterprise admin (sn_prm.enterprise_partner_admin) • Partner program relationship writer (sn_prm.partner_program_rel_writer)	Establish a relationship between channel partners and partner programs.

Related topics

Install Partner Relationship Management

Roles and components of Partner Relationship Management

Configure Channel Partner table

With the Partner Relationship Management application, you can use the channel partner [sn_prm_channel_partner] table to manage and store information related to channel partners.

Before you begin

Role required: sn_prm.enterprise_partner_admin or sn_prm.channel_partner_writer

About this task

The channel partner [sn_prm_channel_partner] table is an extension of External Business Location.

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Channel Partner**.
2. Select **New** to open the Channel Partner Registration details form.
3. On the form, fill in the fields.
   To learn more about the fields on the channel partner table and their descriptions, see Channel partner table fields.
4. Select **Submit**.

Configure Partner Program table

With the Partner Relationship Management application, enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by using the Partner Program [sn_prm_partner_program] table.

Before you begin

Role required: sn_prm.partner_program_writer or sn_prm.enterprise_partner_admin

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About this task

Partner programs define the roles, responsibilities, and benefits for different participants. Some examples of partner programs can be Reseller Program, Managed service provider (MSP) Program, Authorized Training Partner (ATP) Program and so on.

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Partner Programs**.
2. Select **New** to open the partner program record.
3. On the form, fill in the fields.
   To learn more about the fields on the Partner program table and their descriptions, see Partner program table fields.
4. Select **Submit**.

Configure Partner Program Relationship table

With the Partner Relationship Management application, you can establish a relationship between channel partners and partner programs.

Before you begin

Role required: sn_prm.enterprise_partner_admin or sn_prm.partner_program_rel_writer

About this task

Associate channel partners to different structured initiatives or programs using the Partner Program Relationship [sn_prm_partner_program_relationship] table.

Procedure

1. Navigate to **All** > **Partner Relationship Management** > **Partnerships**.
2. Select **New** to open the partnership record.
3. On the form, fill in the fields.
   To learn more about the fields on the Partner Program Relationship table and their descriptions, see Partner program relationship table fields.
4. Select **Submit**.

Configuring Lead-to-Cash Process Management

Plan and configure your implementation of Lead-to-Cash Process Management.

Configuration overview

1. Review the dependencies for installing and using Lead-to-Cash Process Management.

   - For sales process managers to be able to create and monitor sales process records through the CSM Configurable WorkspaceCustomer Service Management (CSM) must be installed.
   - To be able to monitor opportunities, quotes, or orders in the sales process, you must have Opportunity Management, Quote Management, Order Management installed.
   - Business Object Core (sn_bo_core) is automatically installed as a dependency when you install the Lead-to-Cash Process Management application (app-l2c-cockpit).

2. Install Lead-to-Cash Process Management

   You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application installs related ServiceNow® Store applications and

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plugins if they aren't already installed. Install Lead-to-Cash Process Management on each of your environments.

3. Assign roles to Lead-to-Cash Process Management users

   Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.

4. Set up business objects for sales process records

   Create business object group and business object types. Define relationships between the business object types, and add them as members under the business object group. This enables the sales process managers to create sales process records using these entities.

5. Customizing the sales process dashboard

   Define the number of levels and tile content on the node map, and determine how tasks are consolidated on the Tasks tab, to enhance clarity and control so sales process managers can focus on relevant data and navigate through complex sales processes effectively.

6. Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

   Access and modify the default data retention and table cleanup policy to modify it to suit your needs.

7. Setting conditions for enabling email access in Lead-to-Cash Process Management

   Sales process managers can compose emails directly from the dashboard for sales entity records that are monitored within a sales process record.

Install Lead-to-Cash Process Management

You can install the Lead-to-Cash Process Management application (app-l2c-cockpit) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Lead-to-Cash Process Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Lead-to-Cash Process Management:

- Roles
- Tables
- Properties

For more information, see Components installed with Lead-to-Cash Process Management and Properties installed with Lead-to-Cash Process Management.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Lead-to-Cash Process Management application (app-l2c-cockpit) using the filter criteria and search bar.

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

   A list of the versions available to you is displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Result

The Lead-to-Cash Process Management application is installed on your instance. The Business Object Core application is auto-installed as a dependency. For more information, see Components installed with Business Object Core.

The O2C Objects business object group also becomes available. It contains entities involved in the opportunity-to-cash process, such as opportunity, quote, and order. You can use this group provided you have Opportunity Management, Quote Management, and Order Management apps installed on your ServiceNow instance.

What to do next

Assign roles to Lead-to-Cash Process Management users so that they can access features and perform tasks using this app. For more information, see Assign roles to Lead-to-Cash Process Management users.

Assign roles to Lead-to-Cash Process Management users

Assign roles to your users so that they can access features, capabilities, and data in the Lead-to-Cash Process Management application.

Before you begin

Before you can assign roles to your users and groups, make sure you have created and configured required users and groups.

Role required: admin

About this task

The following table lists the roles business object writers and sales process managers need to access the tables necessary to perform their respective tasks.

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Required roles for specific job functions

User persona	Job function	Role required	Tables accessed
Business object writer	Creates business object groups and defines relationships between the business object types.	Business object writer [sn_bo_core.business_object_writer]	• Business Object Type [sn_bo_core_obj_type] • Business Object Relationship [sn_bo_core_obj_rel] • Business Object Group [sn_bo_core_obj_group] • Business Object Group Members [sn_bo_core_obj_group_members]
Sales process manager	Creates sales process records, monitors tasks and activities on the hierarchical node map, links and delinks nodes.	Sales process manager [sn_l2c_cockpit.sales_process_manager]	• Sales Process Record [sn_l2c_cockpit_sales_process_record] • Business Process Record [sn_bo_core_process_record] • Business Process Resource [sn_bo_core_process_resource] • Business Process Task [sn_bo_core_process_task]

You can assign roles to users and groups using either guided setup or through the following user administration features:

- Assign a role to a user
- Assign a role to a group

Related topics

Creating users

Creating groups

Components installed with Lead-to-Cash Process Management

Components installed with Business Object Core

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Set up business objects for sales process records

Create the business objects necessary for sales process managers to create sales process records using these entities.

Before you begin

Role required: Business object writer [sn_bo_core.business_object_writer]

About this task

https://player.vimeo.com/video/1102610152?h=669291cfe1&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Create business object groups.

   a. Navigate to **All** > **Business Object Core** > **Business Object Group**.

   b. Select **New**.

   c. On the form, fill in the fields.

Business Object Group form

Field	Description
Name	Name for the business object group.
Applies to	Workflow or process for which you're creating the business object group. This value should be Sales Process Record [sn_l2c_cockpit_sales_process_record].
Description	A brief description of the business object group.

2. Create business object types to add as members in the business object group.

   a. Navigate to **All** > **Business Object Core** > **Business Object Types**.

   b. Select **New**.

   c. On the form, fill in the fields.

Business Object Type form

Field	Description
Name	Name for the business object type. For example, Opportunity.
Table name	Table associated with the business object. For example, if the business object type is Opportunity, you would enter the Opportunity [sn_opty_mgmt_core_opportunity] table.

   d. Select **Submit**.

3. Define relationships between the object types.

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Relationships define how two object types are related by the source and destination columns on the respective tables and govern the hierarchy of the records displayed on the node map. For example, if you add Opportunity Line and Quote as child entities for the business object type Opportunity, on the node map you would see the related Opportunity Line and Quote records under an Opportunity node.

You can add more than one child entity under a parent business object type. Ensure that you avoid circular relationships.

a. Select the business object type you created.

b. On the Business Object Type page under the Business Object Relationships related list, select **New**.

c. On the form, fill in the fields.

Business Object Relationship form

Field	Description
Source	The parent business object type for which you are creating the relationships.
Destination	The child business object type that is related to the parent.
Source table name	Table name of the parent business object type.
Destination table name	Table name of the child business object type.
Source field	(Optional) The column on the source table used for establishing the relationship.
Destination field	(Optional) The column on the destination table used for establishing the relationship.

d. Select **Submit**.

4. Add business object types as members of business object group.
   a. Navigate to **All** > **Business Object Core** > **Business Object Group**.
   b. Under the Business Object Group Members related list, select **New**.
   c. Select the business object type you want to add using the Lookup list icon ( ).
   d. Select **Submit**.

Result

Business object group and business object types are available in Business process and Business entity lists respectively in the Create new sales process record form in the CSM Configurable Workspace.

Customizing the sales process dashboard

Customizing the number of levels and tile content on the node map enhances clarity and control so sales process managers can focus on relevant data and navigate more easily through complex sales processes.

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Customize hierarchical node map levels for Lead-to-Cash Process Management

Customize the number of node levels to display in the Lead-to-Cash Process Management hierarchical node map visualization.

Before you begin
Role required: admin

About this task
By default, the Lead-to-Cash Process Management hierarchical node map shows three node levels. Although there is no upper limit on the number of node levels you can display, the node map can display a maximum of 250 nodes at a time.

Procedure
1. Select **All** and in the navigation filter, enter `sys_properties.list`.
2. In the **Name** column, search for sn_l2c_cockpit.node_default_levels and select it.
3. If a message appears about the application scope, select **here** to be able to edit the record."
4. In the **Value** field, specify an integer for the number of node levels you want to display on the hierarchical node map.
5. Select **Update**.

Customize details displayed on node map tiles using a decision table

Customize the details displayed on the node map tiles in the Lead-to-Cash Process Management using Decision Tables.

Before you begin
Role required: admin

About this task
You can add more columns to display additional lines. However, this would require you to make code changes in the UI Builder.

Procedure
1. Navigate to **All** > **System Definition** > **Decision Tables**.
2. In the **Name** field of the system properties table, search for and select the Business object type configuration decision table.
   You are redirected to the decision table in Workflow Studio.
3. Change the values in the **Field 1** and **Field 2** columns depending on the information you want to display in the node map tile.
4. **Optional:** Change the icon for the tile.
   a. Access the Icon Gallery to obtain the icon name corresponding to the icon you want to use.
   b. Enter the icon name in the **Node Icon** field.
5. **Optional:** Add decision rows for any additional business entities you created.
6. **Optional:** Verify the changes by selecting **Test**.
7. Select **Save**.

Customize Tasks tab views using EVAM

Customize the sales entities from which the tasks are displayed, icon and fields that are displayed on each task tile, and create custom options to filter and view consolidated tasks on

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the sales process dashboard in Lead-to-Cash Process Management using Entity View Action Mapping (EVAM).

Before you begin

Role required: admin or evam_admin

About this task

Note:
Use SPR task EVAM definition for customizing Tasks tab views. Custom EVAM definitions are not supported.

Procedure

1. Log in to your ServiceNow instance.
2. Select the Globe icon ( ) and set the application scope to Lead-to-Cash Process Management.
3. Navigate to **All** > **Entity View Action Mapper (EVAM)** > **EVAM Definitions**.
4. In the **Name** column, search for and select SPR task.
5. **Optional:** In the **EVAM Datasource M2Ms** tab, add or remove a data source.
   - Create and Link: Define a new data source and then link this data source to your EVAM definition. For more information, see Define a data source.

     Note:
     When specifying a condition to define how the data is filtered from the selected table, select the operator as **is not empty** for the business entity you're adding. For example, **[Quote][is not empty]**.

   - Link Existing: Add a predefined data source to your EVAM definition.
   - Unlink Selected: Unlink a data source you don't want to see on the Tasks tab in the sales process dashboard.
6. Select **Submit**.
7. In the **EVAM View Config Bundle M2Ms** tab, add or remove a configuration bundle.
   - Create and Link: Define a new configuration bundle and then link this bundle to your EVAM definition. For more information, see Defining an EVAM configuration bundle and Defining an EVAM view template.
   - Link Existing: Add a predefined configuration bundle to your EVAM definition.
   - Unlink Selected: Remove the view config bundle for entities you don't want to display.
8. **Optional:** Add more data filter options on the Tasks tab of the sales process dashboard.

   a. In the EVAM Data Filters related list, select **New**.

   b. On the form, fill in the fields.

EVAM Data Filters form

Field	Description
Label	Label name of the EVAM data filter.
Active	Option to activate the EVAM data filter.

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Field	Description
Order	Priority for the EVAM view configuration. Lower numbers indicate a higher priority.
Application	Application scope of the EVAM view configuration.
EVAM Definition	Associate an EVAM definition with the data filter.

9. Select **Submit**.

Related topics

Create an EVAM definition

Modifying data retention and table cleanup policy for Lead-to-Cash Process Management

Modify the default data retention and table cleanup policy for Lead-to-Cash Process Management to match your organizations requirements.

By default, records are deleted from the Business Process Record [sn_bo_core_process_record] and Sales Process Record [sn_l2c_cockpit_sales_process_record] tables and child records in the Business Process Task [sn_bo_core_process_task] and Business Process Resource [sn_bo_core_process_resource] tables if they meet either of the following conditions:

- In an inactive state and not updated in the past six months
- In an active state but not updated in the past year

You can modify the data retention and table cleanup policy depending on your expected load and volume.

To find out how to modify the data retention and table cleanup frequency for Lead-to-Cash Process Management, see Modify data retention policy for ATF test results.

Related topics

Table cleanup

Autoflush form

Setting conditions for enabling email access in Lead-to-Cash Process Management

Sales process managers must be granted access to compose emails for the sales entity records that are monitored within a sales process record.

Sales process managers can compose and send emails related to a sales process record by default. Enable sales process managers to compose emails for the related sales entities by setting the value of the *email_client* dictionary attribute to *true* and using either of the following methods:

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- Grant the sales process manager write access to the child entity. For more information, see Enable the email client for a table.
- Set the value of the *glide.email_client.check_write_access* system property to *false* to override checking whether the user has write access to the child entity.

Note:
The *glide.email_client.check_write_access* system property isn't supported on Xanadu and Yokohama Glide versions. If you're using these Glide versions, then you must grant your users write access to the child entity.

Related topics

Email client

View and send emails in Lead-to-Cash Process Management

Configuring Customer Engagement Sequences

Plan and configure your implementation of Customer Engagement Sequences.

Configuration overview

1. Install Customer Engagement Sequences

   You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed. Install Customer Engagement Sequences on the ServiceNow instances in all of your environments:

2. Create a customer engagement sequence

   Create a customer engagement sequence from the CSM Configurable Workspace. Specify trigger and exit conditions, and add activities to create a guided experience for your sales representatives to engage with their prospects and customers.

Install Customer Engagement Sequences

You can install the Customer Engagement Sequences application (com.sn_crm_sequence) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Customer Engagement Sequences application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Customer Engagement Sequences:

- Roles
- Tables

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For more information, see Components installed with Customer Engagement Sequences.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Engagement Sequences application (com.sn_crm_sequence) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Create a customer engagement sequence

Create a customer engagement sequence to guide your sales representatives through engaging with their prospects and customers.

Before you begin

Role required: playbook.admin or pd_author

About this task

Setting up a sequence is based on playbooks and requires you to be familiar with using Workflow Studio and Playbook Experience.

> **Important:**
> Setup and Tear Down are predefined stages in the Customer Engagement Sequences playbook. Do not remove these stages or add more activities in it. Avoid making any other changes to the Start Sequence and End Sequence activities.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. Navigate to **Sequences** > **All Sequences**.
4. Select **Create New Sequence**.
5. On the Create new Sequence window, specify a name and optionally a description for your sequence and select **Create**.
   You're redirected to Workflow Studio and a playbook of the type sequence is created with the following predefined stages:
   - Setup
   - Configure sequence activities
   - Tear Down
6. Define trigger conditions that initiate a sequence.

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a. Select the Edit icon above the Start pill.

b. On the **Schedule** tab of the Playbook properties form, indicate whether you are using an existing trigger, which includes the trigger type and the conditions that set up the sequences, or defining a new one.
   - To use an existing trigger, select **Choose an existing trigger** and then proceed to step 7.
   - To define a new trigger, select **Define your own conditions for when your process runs**.

c. In the drop-down list for the **Define your own conditions for when your process runs** choice, select the trigger type for the new trigger.
   The available trigger types are:
   - Record Create
   - Record Update
   - Record Create or Update

d. In the **Table** field, select the table whose record operations you want to use to trigger your playbook.
   For example, you might want the sequence to trigger when a record is created or updated in the Lead [sn_lead_mgmt_core_lead] table.

e. In the **Condition to run** field, add conditions that must be met to trigger your playbook.

   Example
   For example, to trigger the sequence when a new record is created in the Lead [sn_lead_mgmt_core_lead] table, you would set the condition **[Stage][is][New]**.
   For more information, see Condition builder.

f. Select the frequency for your trigger from **Run my trigger** drop-down list.
   The available options are:
   - Once
   - For each unique change
   - Only if not currently running
   - For every update

g. **Optional:** Trigger your playbook for tables that extend your selected table by selecting the **Run this trigger on extended table** check box.

h. **Optional:** Provide users with the ability to rewind the playbook from the beginning by selecting the **Details** tab and selecting the **Allow this playbook to be restarted during runtime** check box.

i. Select **Save and close**.

7. **Optional:** Change the priority with which a sequence task is created in the Start Sequence activity of the Setup stage.
   When the trigger condition is met, this activity creates a sequence task with a state of Work in progress and a priority of Moderate by default.

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Note:
Do not remove this stage or add more activities to this stage. Avoid making any other changes to the Start Sequence activity.

8. In the sequence diagram, configure sequence steps in the Configure sequence activities stage.

   Use this stage to configure activities you want to make available to the sales representative as guided sequence steps during runtime. For more information, see Add and configure an activity in a playbook.

   You can add any number of activities to this stage in your sequence.

9. **Optional:** Exit early from the sequence by selecting the **Customer Engagement Sequences** > **Update Sequence Task** activity from the activity picker.
   For more information on adding an activity, see Add and configure an activity in a playbook.
10. Review the configuration in the Tear Down stage.
    This predefined stage updates the sequence task record when the sales representative completes all the sequence steps in their sequence task. By default, the system updates the state of the sequence task record as complete (indicated by State = 3) in the Customer Engagement Sequence Task [sn_crm_sequence_task] table.

    Note:
    Do not remove this stage or add more activities to this stage. Avoid making any other changes to the End Sequence activity.

11. Verify the sequence by selecting **Test**.
12. Select **Activate** to publish the sequence.
13. **Optional:** View the sequence in the CSM/FSM Workspace by selecting the List icon and navigating to **Sequences** > **All Sequences**.

What to do next

View sequence tasks and execute sequence steps. See Using Customer Engagement Sequences.

Related topics

- Stages and activities
- Triggers
- Table extension and classes
- Restart

Activate the Return Merchandise Authorization plugin

If you have the admin role, you can activate the RMA Case Management plugin (com.sn_csm_rma_case). The plugin enables you to manage and triage return cases for customer products and services, addressing returns, replacements, and repair use cases.

Before you begin

Install the following plugins or confirm that they exist before activating the RMA Case Management plugin:

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List of plugins to be installed before the RMA Case Management plugin

Plugin	Description
Lead to Cash Core [com.snc.l2c_core]	Enables you to compose Lead to Cash flow.
Customer Service Install Base Management [com.snc.install_base]	Enables you to capture the current state of the install base and establish the relationship to any downstream entities that may impact their functioning.
Case lines and workflows [com.sn_case_line]	Enables a case to hold many line items. The line items are product instances and can be extended for various order to case operations entities.
Entitlements Verification [com.sn_ent_verify]	Provides API to verify entitlement and characteristics.

Role required: admin

About this task

The following items are installed with RMA Case Management:

- Plugin
- Tables
- Roles

For more information, see Return Merchandise Authorization Case Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the RMA Case Management plugin (sn_csm_rma_case) using the filter criteria and search bar.

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

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

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

Using Sales Customer Relationship Management applications

As agents and managers, you use the CSM Configurable Workspace to complete various tasks when using the Sales Customer Relationship Management applications. From the workspace you can access product catalogs to see the product offerings available in your organization. You

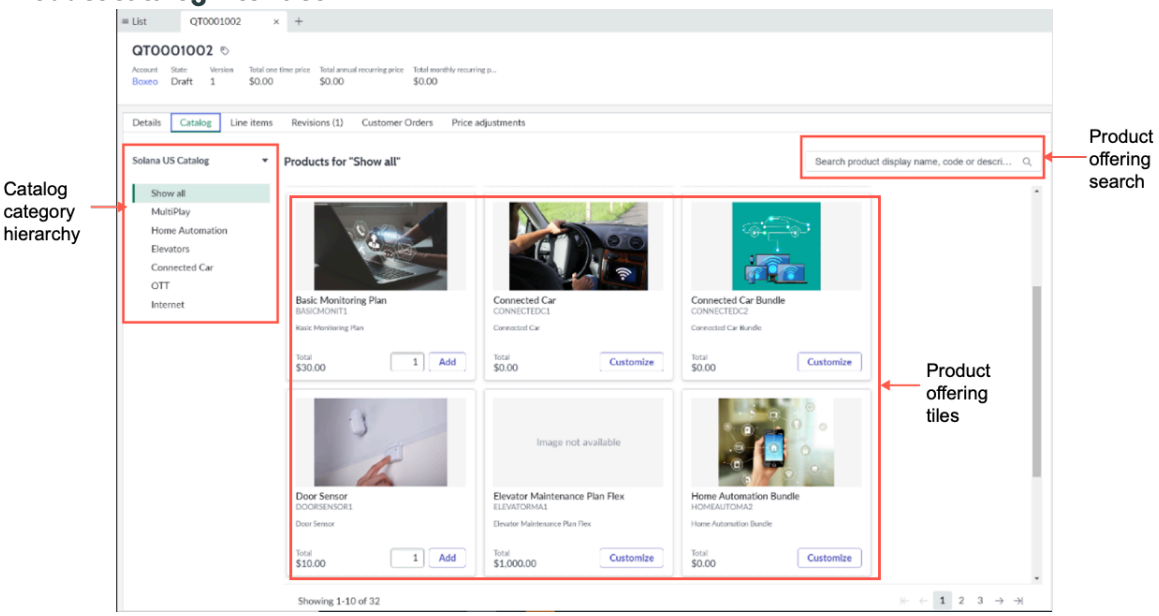
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can also use the product configurator to add configurable products to opportunities, quotes, and orders, manage sold products and product inventory, and work on MACD orders.

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 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, 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

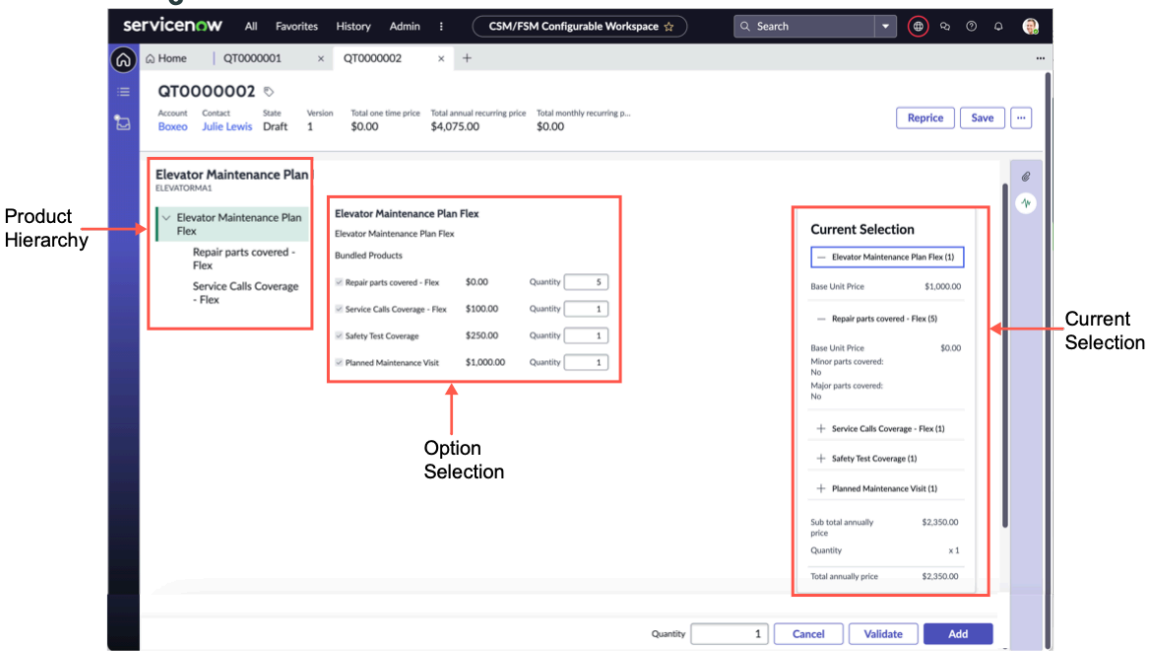
The product configurator is an interface for customizing configurable product offers. It displays the product options available and automatically calculates product pricing as you select options.

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.

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Product configurator interface



When you're adding configurable products to opportunities, quotes, and orders, you can create and manage multiple offering instances for certain types of child offerings. You can then configure the product options and characteristics for each offering instance separately, rather than use the same set of options and characteristics for the entire quantity of a particular child offering. For more information, see Create multiple configurations.

Create multiple configurations

Create multiple configurations of a child product offering when you're adding a configurable product to an opportunity, quote, or order. You can then configure the product options and characteristics separately for each offering configuration.

Before you begin

Role required:sales_agent or sn_ind_tmt_orm.order_agent

About this task

If your product catalog admin has enabled multiple configurations for child offerings in a bundled product, you can create multiple child offering configurations for selected child offerings. When creating multiple configurations of child offering, you can do the following:

- Change the quantity of a child offering that can have multiple configurations.
- Clone a child offering or split a child offering that has a quantity greater than 1.
  - The **Clone** option copies the child offering based on the number of copies that you specify and creates identical offering configurations.
  - The **Split** option divides the current child offering quantity by the number of splits that you specify and distributes the quantity evenly across all the copies.
- Customize the options and characteristics for each child offering instance created.
- Delete a child offering instance, as long as the minimum number of child offerings defined for the product is maintained.

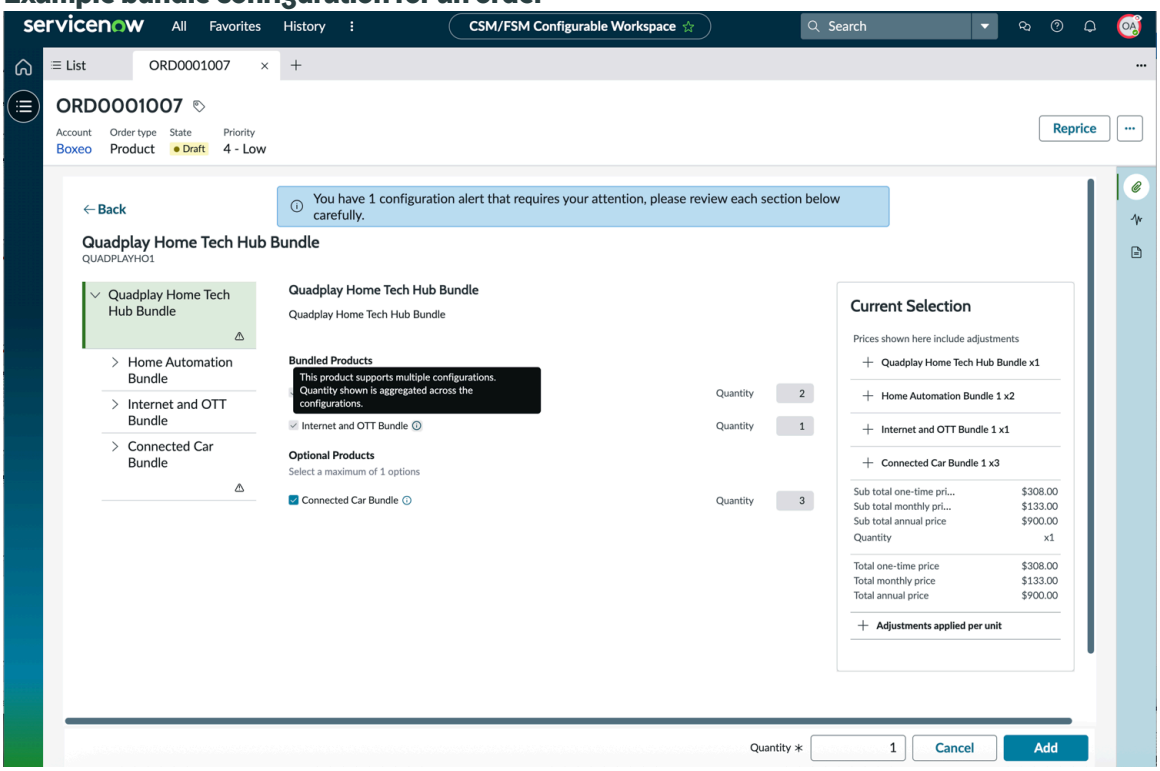
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Note:
Even when the multiple configurations feature is enabled, there are scenarios in which some configuration options might not be available. The system uses the default, minimum, and maximum quantity values from the product definition to determine valid configurations and then enables or disables the **Split** or **Delete** options for managing child offering configurations. For more information on validation, see Multiple configurations.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to the opportunity, quote, or order that you want to work with.
   For example, navigate to **Quotes** > **All** and select the quote that you want to work with.
3. Select the Catalog tab.
4. In the product catalog hierarchy, select the product catalog that you want to use.
   The product catalog displays the available products as product offering cards.
5. Select the configurable product by choosing **Customize** in the appropriate product offering card.
   The product configurator displays the product offering configuration, including the bundle product options and characteristics. Child offerings that can have multiple configurations are identified by Information icons. Select the Information icon to view a message indicating that the offering can have multiple configurations and that the offering quantity shown is aggregated across the configurations.

Example bundle configuration for an order



6. Navigate to the child offering in the product hierarchy, which displays the offering summary page.
   You can do the following:

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- To change the quantity of the child offering, enter the new value in the **Quantity** field.
- To add new configurations for the offering, select the **More options** () menu next to the **Quantity** field and select an option.

More options

Option	Description
Clone	Option for creating copies of the selected child offering. Enter the number of clones to be created. The system creates identical copies of the child product offering, and each clone has a quantity of 1. For example, if the current child offering quantity is 2, and you specify 2 clones, two identical copies of the child offering are created. Each clone has a quantity of 1 and becomes a separate line item that you can configure. **Note:** The system checks the total quantity allowed for the child offering.
Split	Option for creating child offering instances by splitting the current child offering quantity and distributing the quantities across the offering instances. Enter the number of splits to be used. For example, if the child offering quantity is 5, and you specify 3 splits, the system creates two child offering instances. After the split, you have three child offering instances, which have a quantity of 2, 2, and 1, respectively. You can then configure each line item as needed.
Delete	Removes an existing child offering instance.

New configurations resulting from the clone or split are listed in the product catalog hierarchy. The associated pricing is displayed in the Current Selection pane.

- New configurations have names that reflect the child offering name, followed by an incremental number, for example, Home Automation Hub 2, Home Automation Hub 3, and so on.
- Quantity changes for a child offering are also reflected in the Current Selection pane.

7. For each new offering configuration, select the appropriate characteristics and product options.
8. When you finish configuring the child offerings, select **Add** to add each configuration as a separate line item to your opportunity, quote, or order.

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Using Lead Management

Use the Lead Management to create your lead.

Lead Management interface

The Lead Management interface contains the following tabs:

Lead Management tabs

Tab	Description
Details tab	Add basic information for your lead.
Catalog tab	Search for and add product offerings to your lead.
Needs tab	Lists the need templates that provide product recommendations for a lead.
Tasks tab	Create lead tasks.
Appointments tab	Create appointments for your lead.
Line items tab	Add different line items to a lead.
Emails tab	Create emails to communicate with the required stakeholders.

Create a lead

Create a lead in the Lead Management application by entering the details, such as customer name, sales stage, lead type, score, and source.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select **New**.
3. On the form, fill in the fields.

Create new lead

Field	Description
First Name	First name of the lead.
Last Name	Last name of the lead.
Email	Email address of the lead.
Mobile Phone	Mobile number of the lead.
Business Phone	Business phone number of the lead.
Title	Title of the lead.
Company	Company name of the lead.
Stage	Stage of the lead.

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Field	Description
Lead Source	Source of the lead.

4. Select **Create Lead**.
   A message confirms that the lead was created. To continue working on the lead, select the link in the message.
5. Select **Refresh** to see the new lead in the list.

What to do next
Start adding more information to your lead. To learn more, see Add and view the details of a lead.

Update a lead

Edit or update a lead in Lead Management.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that is in New or Contacted or Nurturing stage.
   - On the **Leads- All** page, select **Edit** to make changes to lead information and select **Update**.
   - Open the lead record, make the changes and select **Save**.

What to do next
To learn more, see Using Lead Management.

Assign a lead

Assign a lead to a sales agent in Lead Management.

Before you begin
Role required: sales_agent or sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that you're working with.
   - On the **Leads- All** page, select **Assign to**.
   - Open the lead record, select three-dot menu ( ) at the top-right corner on the lead header and select **Assign to**.

   To Create a lead, select **New**.

   Note:

   Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

3. On the **Assign leads to** dialogue box, select **Owner** and choose a sales agent.

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You can select the box if you want to reassign all the tasks from the selected leads to this sales agent.

4. Select **Assign**.

What to do next
To learn more, see Using Lead Management.

Add and view the details of a lead

Use the Details tab to add more information about your lead.

Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select the lead that you're working with.
3. Fill in additional information on the Details tab.
   To learn more, see Create a lead.
4. Select **Save**.

What to do next
Use the Product Catalog tab to add products to your lead. To learn more, see Add products to a lead.

Add products to a lead

Use the Catalog tab in the Lead Management to add products to your lead.

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 lead.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and , select the lead that you're working 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.
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.

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Element	Description
Search field	Use the search field to search for a product in the product catalog hierarchy selected.

5. Select **Add**.
   The product offering is added to the lead as a **Line Item**.

What to do next
Add line items to a lead.

Get product recommendations for leads using needs analysis

Choose a needs template from the product selection guide in the product catalog to get product recommendations for sales leads.

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 **Leads** > **All** and select the lead that you want to work on.

   The product catalog displays in the Catalog tab of the lead.
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 lead. 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 a lead

Create a new product line item for your lead by entering the details, such as product offering and quantity.

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Before you begin
Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **LeadsAll**.
3. Select the lead you want to work with and select the **Line Items** tab.
4. Select **New** to start a new lead line item or select an existing lead line item to make changes.
5. Fill in the fields in the Lead Line Item form.

Lead Line Item form

Field	Description
Number	System-generated number of the lead line item.
Quantity	Quantity of the lead line item.
Product Offering	Product offering bundle for the lead line item.
Unit of Measure	Measuring unit of the lead line item.
Work Notes	Additional information related to the lead line item.

6. Select **Save**.
   The Lead Line Item is added to the main lead.

What to do next
.Add lead tasks.

Add lead tasks

Create lead tasks to follow-up calls, emails, or meetings with your to progress on the lead.

Before you begin
Role required: sales_agent

Procedure

1. Navigate to **List** view and select **Leads - All**.
2. From the **Leads List** window, select the lead you want to work with.
   - On the **Leads- All** page, select **Create task**.
   - Open the lead record, select the **Tasks** tab and select **New** to start a new lead task or select an existing lead task to make changes.

   To Create a lead, select **New**.

   Note:

   Immediately after you create the lead, a message confirms that the lead was created. To continue working on the lead, select the link in the message.

3. Fill in the fields in the **Create task for lead** form.

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Create task for lead

Field	Description
Short description	Description about the lead task.
State	State of the lead task.
Due date	Date by which the lead task has to complete.
Assigned to	Name of the sales agent to whom this lead task is assigned.

4. Select **Create Task**.
   This task is added to the lead.

What to do next
You can create appointments in your lead tasks. To learn more, see Create appointments.

Create appointments for lead tasks

Create appointments with your stakeholders to conduct business discussions for your lead.

Before you begin
Role required: sales_agent

About this task
You can create appointments only after creating a lead task. To create a lead task, see Add lead tasks.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Lead** > **All**.
3. Select the lead task you want to work with and select the **Appointments** tab.
4. Select **New** to start a new appointment or select an existing appointment to make changes.
5. Fill in the fields in the Create New Appointment form.

Create New Appointment form

Fields	Descriptions
From	Email id of the sender.
To	Email id of the receiver.
Activity state	State of the appointment.
Start time	Start time of your appointment.
End time	End time of your appointment.
Reminder	Time interval for a reminder.
Subject	Subject information of your appointment.
Location	Location of your appointment.

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Fields	Descriptions
Message	Additional information for your appointment.

6. Select **Save** to save the appointment and send it later or select **Send activity** to send it now.

Compose emails

Create an email to communicate the product information to your customer as per the business requirements.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select a lead that you want to work with.
3. Select the **Emails** tab.
4. Select **Compose Email** to start a new email or select an existing email to view details.
5. Fill in the details in the Email draft form.

Lead 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 discard your email, select **Discard draft**. To attach any files with your email, select **Attach File**.

6. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.

Manage leads using Kanban view

Personalize and manage the leads information that is most relevant to you and your stakeholders using the Kanban view.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All**.
3. Select the **View Kanban** button.

By default, the leads are grouped by different stages and displayed on the page.

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- To change a lead stage, drag the lead card from one state and drop it into another state.
- To view the leads by different categories, such as industry, source, and reason, select **Group by:** drop-down menu on the page.
- You can take various actions for your leads, such as creating a lead task, assigning a lead, and composing an email by selecting the three vertical dots ( ) either on a lead card or vertical leads stage header.
- To create a new lead directly from this page, select **New** button. To learn more, see Create a lead.

Convert a lead into an opportunity

Convert a lead into an opportunity in Lead Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. In the **Leads - All** list, select the lead that you're working with.
   - For a business customer, select **Convert lead** > **to an account** and fill in the fields in the form.

Convert lead form

Field	Description
Account	Name of your customer account. ▪ Create new: Select if you want to create a new account. ▪ Choose existing: Select if the customer is your existing account.
Contact	Name and email of your customer contact. ▪ Create new: Select if you want to create a new contact. ▪ Choose existing: Select if the contact already exists.
Opportunity	Details to create an opportunity. To learn more, see Create an opportunity. ▪ Create new: Select if you want to create a new opportunity. ▪ Choose existing: Select if you already have an existing opportunity. **Note:** Select the check box if you don't want to create an opportunity for the lead.

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- For a consumer account, select **Convert lead** > **to a consumer** and fill in the fields in the form.

Convert lead form

Field	Description
Consumer	Name and email of your consumer. ▪ Create new: Select if you want to create a new contact. ▪ Choose existing: Select if the contact already exists.
Opportunity	Details to create an opportunity. To learn more, see Create an opportunity. ▪ Create new: Select if you want to create a new opportunity. ▪ Choose existing: Select if you already have an existing opportunity. **Note:** Select the check box if you don't want to create an opportunity for the lead.

3. Select **Convert Lead**.
   A dialog box appears for the successful conversion of your lead into an opportunity. You can select the new opportunity record that was created.

Disqualify a lead

Disqualify a lead in Lead Management.

Before you begin

Role required: sales_agent or sales_manager

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All** and select an existing lead that you're working with.
3. Open the lead record, select three-dot menu ( ) at the top-right corner on the lead header and select **Disqualify lead**.

   Note: You can only disqualify a lead that is in New or Contacted or Nurturing stage.

4. On the **Disqualify lead** dialogue box, select a **Reason**.
5. Select **Disqualify**.

What to do next

To learn more, see Using Lead Management.

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Export leads

You can export a quote as a JSON file in Lead Management and provide it to a customer.

Before you begin
Role required: sales_agent

About this task
The export lead feature in Lead Management exports a list of all leads. Use the following steps to export leads.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Leads** > **All**.
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 leads is exported according to the parameters set.

Using Opportunity Management

Use the Opportunity Management application to create your opportunity.

The Opportunity Management interface has tabs that help you create and manage your opportunities.

Opportunity Management tabs

Opportunity Management tab	Description
Details tab	Add details of the opportunity such as account, sales cycle, and stage information.
Catalog tab	Use 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..
Competitors tab	Add competitors information to your opportunity.
Tasks tab	Create opportunity tasks.
Emails tab	Create emails to send to the required stakeholders.

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Opportunity Management tabs (continued)

Opportunity Management tab	Description
Quotes tab	Create quotes directly from the Opportunity.

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 Add and view the details of an opportunity.

Add and view the details of an opportunity

Use the Details tab to add and view information about your opportunity, including the source and competitor.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Opportunity** > **All** and select your opportunity.
3. Fill in the information on the Details tab.

Opportunity Details tab

Field	Description
Number	The system-generated number of the opportunity.
Account	Company name of the customer account.
Contact	Name of the individual in the company that you interact with.

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Field	Description
Sales Cycle Type	Type of sales, for example NEWCUST, RENEW, or UPSELL.
Stage	Phases of the opportunity. For example, Qualify, Develop Propose, Negotiate, Closed-Won or Closed-Lost.
Owner	Sales agent or sales representative assigned to this opportunity.
Short Description	Brief description of the opportunity.
Description	
Primary Quote	
Industry	Name of the industry. For example, Telecommunications or Manufacturing or Healthcare or Banking.
Estimated Deal Size	Amount of potential opportunity.
Probability %	Estimated percentage of the sales opportunity's success.
Amount	**Note:** If an opportunity doesn't have any line items, then the amount picks up the same value as the **Estimated Deal Size**. When opportunity line items are added, the amount value changes as the value is picked up from **Total TCV**.
Weighted Amount	Total revenue adjusted by the probability percentage. The **Weighted Amount** for an opportunity is calculated by multiplying the **Probability %** with the **Amount**. For example, if the probability percentage for an opportunity is 10 (0.1%) and the amount is 100$, the weighted amount is 0.1 X 100 = 10.00.
Opportunity Group	
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.

4. Fill in the following fields in the **Pricing** section of the **Details** tab.

Note:
The **Total MRR**, **Total ARR**, **Total ACV**, and **Total TCV** fields are calculated automatically based on the value of the opportunity line items associated with an opportunity.

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Opportunity Pricing section

Field	Description
Currency	Currency of the price list, for example USD for US dollars.
Price List	Default price list for the opportunity.
Term (months)	Subscription period of the opportunity line item. The default term is 12 months.
Total one-Time Price	Total price of all one-time products or services in the opportunity.
Total MRR	Total monthly recurring revenue (MRR) amount for all recurring products and services.
Total ARR	Total annual recurring revenue (ARR) amount for all recurring products and services each year.
Total ACV	Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract.
Total TCV	Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract.

5. Select the customer's preferred mode of communication.
   - Do Not Call
   - Do Not Email
   - Do not Share
6. In the **System Information** section of the Details tab, fill in the required fields with information about when the opportunity was created and by whom and enter any related **Work Notes**.
7. Select **Save**.

What to do next
Use the Product Catalog tab to add products to your opportunity.

Add products to an opportunity

Add products to your opportunity using the **Catalog** tab in Opportunity Management.

Before you begin
Role required: sales_agent

About this task
In the **Catalog** tab, you can search for and select simple or complex product offerings from catalogs and add them to your opportunity. Complex product offerings have options to customize the product by using the product configurator.

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Note:
Check your entitlements to see if the product configurator is available.

Procedure

1. Navigate to **All** > **Workspaces**.
2. In the CSM Configurable Workspace, select the List view icon ( ).
3. Navigate to **Opportunity** > **All** and select the opportunity that you want to work with.
4. Select the **Catalog** tab.
5. In the product catalog hierarchy, select the product catalog that you want to use.
   The product catalog displays the available products in product offering cards.
6. In the product offering card, select the product.
   - For a simple product that doesn't have any selectable options, select **Add**.
   - For a configurable product that has options that you can choose, select **Customize** to open the product configurator and select product options.

     As you configure the product, you can reprice, validate, and save your selections. For details on using the product configurator, see Using Sales Customer Relationship Management applications.

   The product offering is added to the opportunity as a line item.

Get product recommendations for opportunities 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** and select the opportunity that you want to work on.

   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:

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- 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 card 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 and quantity.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** view, 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.
Unit Net Price	Price per unit after adjustments, if any.
Term (months)	Subscription period of the opportunity line item. The default term is 12 months only for recurring products.
Quantity	The quantity of the opportunity line item.
Service location	Service location to which the opportunity line item applies.

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Fields	Descriptions
Price List	Default price list based on the opportunity created.
Periodicity	Periodicity is based on the pricing method selected for the product offering. ○ 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. **Note:** The **Unit Net price** and **Unit List Price** fields have the same values if the opportunity isn't in sync with the quote.
Cumulative One-Time Price	One-time price of the opportunity and opportunity child line items. Cumulative One-Time Price = Quantity * Unit Net Price.
Cumulative MRR	Cumulative monthly recurring revenue of the opportunity and any child lines. ○ If periodicity is monthly, Cumulative MRR = Unit Net Price * Quantity. ○ If periodicity is annual, Cumulative MRR = Unit Net Price/12 months * Quantity. Customer can change this formula in case of they customize their own values for periodicity. This field is populated only if the periodicity of the opportunity is recurring in nature.
Cumulative ARR	This field is populated only if the periodicity of the opportunity is recurring in nature. Cumulative ARR = Cumulative MRR * 12
Cumulative ACV	Total annual contract value (ACV), which is the yearly amount revenue for all products and services from a customer contract. Cumulative ACV = Cumulative One-Time Price + Cumulative ARR.

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Fields	Descriptions
Cumulative TCV	Total contract value (TCV), which is the total amount of revenue from a customer contract expected over the lifetime of the contract. Cumulative TCV = Cumulative One-Time Price + Term * Cumulative MRR.
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

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Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. 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.

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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.
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.

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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.

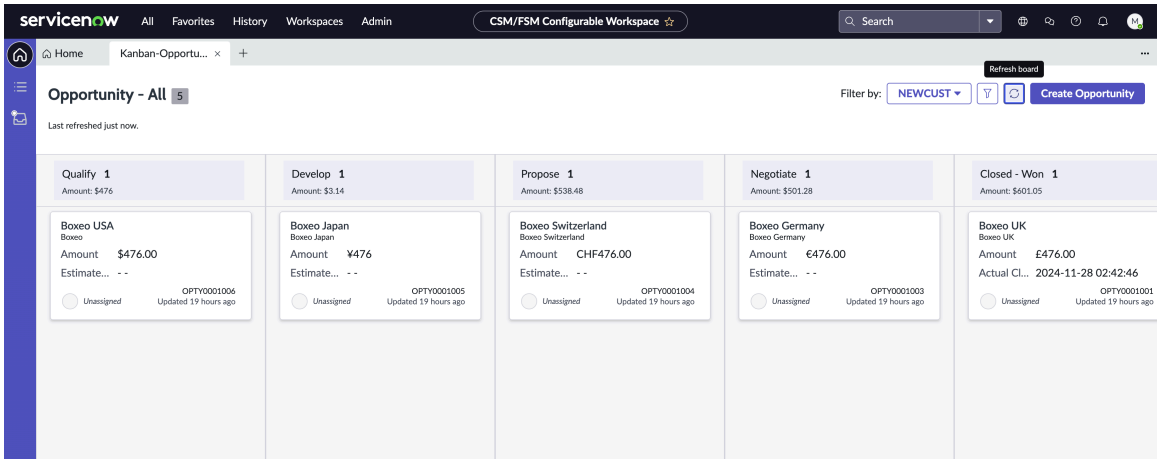
Before you begin
Role required: sales_agent

About this task
A Kanban view is a visual representation of the data that enables you to drag and drop the data records according to 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.
- Updating the state of an opportunity by navigating them in between different stages.
- Viewing the auto-calculated rollup amount (in the base currency) on the sub-header for all opportunities in Kanban lane.

The Kanban view as part of Opportunity Management in Sales Customer Relationship Management.

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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 the Filter by option on the page.
   - To create a new opportunity directly from this page, select the **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.

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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. Select the opportunity that you want to work with and select the **Quotes** tab.
3. Select **Create Quote** to create a new quote from the selected opportunity.

Create a quote from an opportunity line item

Create a quote from the selected line items in an opportunity record.

Before you begin
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 **Line Items** tab.
3. Select one or more line items and select **Create new quote** to create a quote from the selected line items.
   A dialogue box appears that indicates the creation of new quote. Select the new quote record to view it. Or you can also navigate to the Quotes tab to view the new quote record.

What to do next
To learn more about using the Quote Management workspace, see Using Quote Management.

Sync quote and opportunity

Sync quote information from the quote record to an opportunity record. This keeps the quote data consistent and accurate across both the records and enables sales agents to track revenue from opportunities accurately.

Establish a sync between quote and opportunity

As a sales agent, you can establish the sync between quote and opportunity records and ensure that a defined set of fields between opportunity-quote and opportunity line items-quote line items remain synchronized.

When a quote is created through an opportunity, the **Source Opportunity** field on the quote record is automatically populated with the details of the opportunity through which the quote is created. To create a quote through an opportunity, see Create a quote.

When a quote is created with child line items, the revenue metrics and prices for the quote are automatically calculated. To learn more about the revenue metrics and how they're calculated, see Subscription revenue metrics.

When the quote record is synchronized with the opportunity record, the prices and revenue metrics are also synced and are consistent across both forms.

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The **Synced** banner on the **Details** tab on the opportunity record displays whether the quote is in sync with its opportunity. To automatically sync the first quote with its source opportunity, set the autoEnableSyncFirstQuote system property to **true**.

To learn more about establishing a sync between quote and opportunity and automatically enable sync, see Sync a quote with an opportunity.

You can create a new version of a quote from a quote record to establish a sync between the new revised quote with the initial opportunity.

Note:
The new version of the quote is in sync with the opportunity only if the previous version was also in sync.

View the new quote revisions from the **Revisions** tab on the quote record.

On the quote record, mark the **State** as **Accepted** or **Completed** to move the synced opportunity to **Closed-won**.

Map quote and opportunity header fields and line items

As a sales agent, you can only edit and make changes on the fields on an opportunity record that aren't in sync with a quote.

The following is a list of default field mappings between opportunity line items with quote line items and opportunity header with quote header fields. To learn more about the fields and their descriptions, see Subscription revenue metrics.

Default synced fields between opportunity header and quote header

Opportunity header	Quote header
Term (months)	Term (months)
Total one-time price	Total one-time price
Total MRR	Total Monthly Recurring price
Total ARR	Total Annual Recurring price
Amount	Total Amount
Primary Quote	Quote id ref
Currency	Currency
Price list	Price list

Default synced fields between opportunity line-item and quote line-item fields

Opportunity Line items	Quote Line items
Term (months)	Term (months)
Cumulative one-time price	Cumulative one-time price
Cumulative MRR	Cumulative Monthly Recurring price
Cumulative ARR	Cumulative Annual Recurring price
Cumulative TCV	Cumulative Net price
Product offering	Product Offering

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Default synced fields between opportunity line-item and quote line-item fields (continued)

Opportunity Line items	Quote Line items
Price list	Price list
Unit of measure	Unit of measure
Unit list price	Unit list price
Quantity	Quantity
Periodicity	Periodicity
Unit net price	Unit net price

Note:
When an opportunity and quote header, and an opportunity line item and quote line item are in sync with each other, the addition and deletion of line items on the opportunity record is disabled. All the synced fields on the opportunity and opportunity line item record becomes read only.

Collaborate with stakeholders by using the sidebar

Initiate a discussion with internal and external stakeholders, such as sales agents, solution consultants, and subject matter experts using sidebar integration with Microsoft Teams.

Before you begin

Role required: sales_agent or sales_manager

Before using the sidebar integration, you must first complete configuring the sidebar integration with your opportunity. To learn more, see Configuring Sidebar.

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.
3. Select **Discuss** on the opportunity header.
4. On the form, fill in the fields.
5. Select **Start discussion**.
   A Microsoft Teams chat is created for your collaboration.

What to do next

Make your collaboration more effective by sharing emojis, messages, and attachments.

Location-based transactions for Opportunity Management

Agents can create opportunities and support product configurations and services for different locations.

Agents can use the location filter in the product catalog to select a particular customer location. The catalog only displays the products associated with that location. This enables the agents to add appropriate product lines to an opportunity. Agents can also copy products and services from one location to the other within a single transaction. This eliminates the need to create multiple opportunity line items for each location. To learn more about copying locations, see Copy opportunity line items to a location.

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Using location-based transactions

To use the location filter in Opportunity Management, complete the following steps.

Note:
As an agent, you can use the location feature if the location-based transactions property is enabled by your admin and eligibility rule filters and product eligibility rules have been configured by your product catalog admin.

Using location-based transactions

Step	Description	Role
Use location filter to add opportunity line items	Use the **Service location** filter in the **Catalog** tab to add opportunity line items to a location.	Agent
Copy opportunity line items to a location	Copy existing line items to another location in the opportunity based on the eligibility rules set up by your product catalog admin The copy line items modal is displayed when selecting **Copy** on the line items related list. If the system property is false, all the line items are copied.	Agent

Use location filter to add opportunity line items

Use the **Service location** filter in the product catalog to add products (line items) to a location.

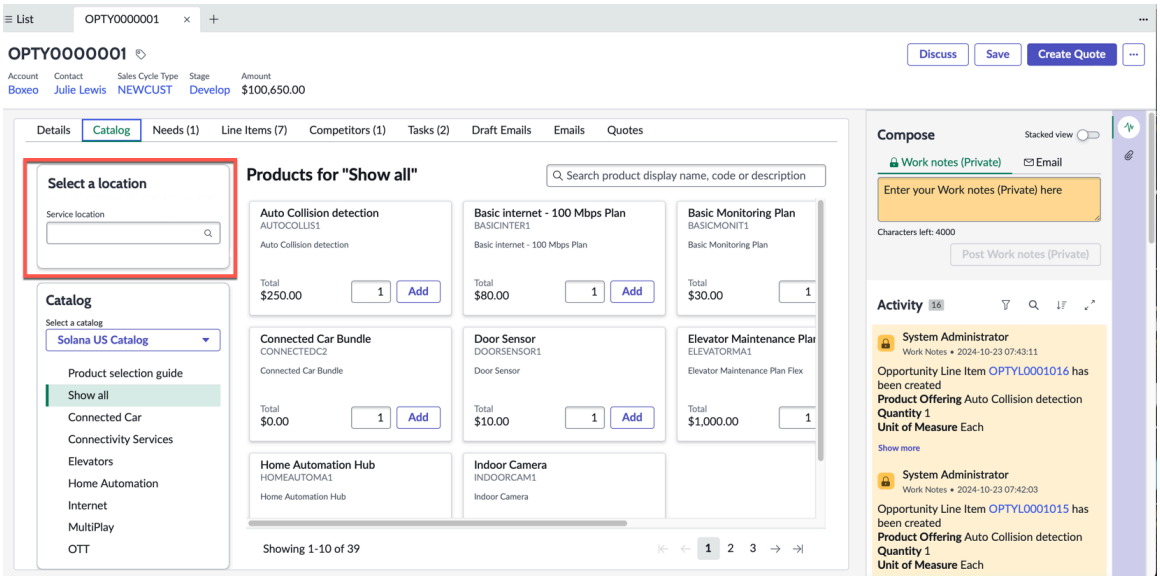
Before you begin
Role required: sales_agent

About this task
You can add opportunity lines by location if the location-based transactions property is enabled by your admin and eligibility rule filters and product eligibility rules have been configured by your product catalog admin for location-based transactions.

Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and navigate to the **Catalog** tab.
3. In the **Select a location** filter, pick a location to which you want to add the line items.
   After you select a location, only the opportunity line items that are eligible for the selected location are displayed.

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4. Select **Add** to create an opportunity line item.
5. Navigate to the **Line Items** tab to view the details of the newly added opportunity line item.

Copy opportunity line items to a location

Duplicate existing line items to another location using **Copy** on the Line items tab.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity-All**.
2. From the **Opportunity List** view, select the opportunity you want to work with and select the **Line Items** tab.
3. Select one or more opportunity line items that you want to copy to another location.
4. Select **Copy**.
5. In the **Copy line items** dialog box, choose one of the options.

> **Note:**
> Select the **Continue to copy only eligible lines for this location (exclude ineligible)** option in the **Copy line items** dialog box.
>
> This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If this option isn't selected, no opportunity line items are copied.

6. Select **Copy**.

Using Sales Forecasting

Sales Forecasting uses the current opportunities in the system to predict future opportunity amounts. The Opportunity Management application contains the list of opportunities created for the customers and each of these opportunities are in different stages of the sales cycles.

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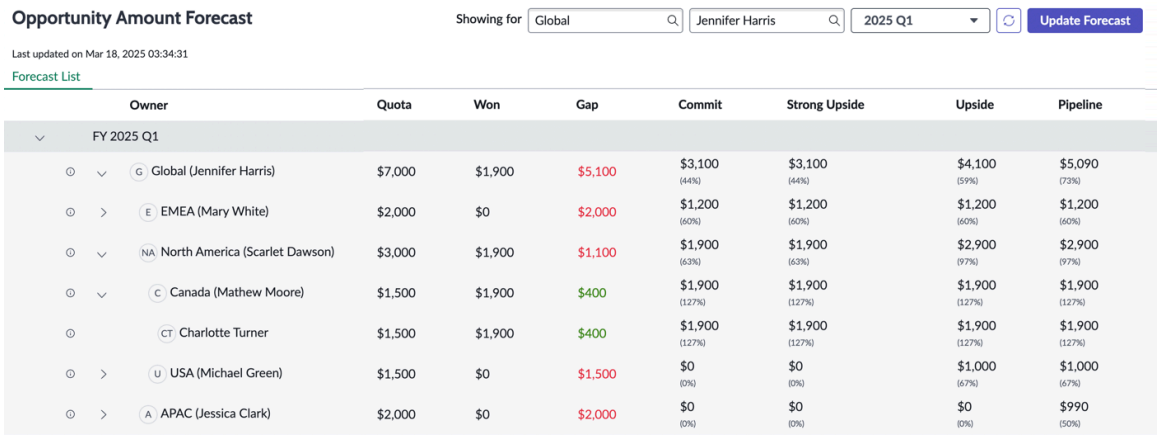
Once an opportunity is created, the Forecast Category field displays Pipeline by default. The sales agent working on that opportunity updates this field once the sales process starts. When the agents update the forecast category, the dashboard keeps displaying the latest data. The forecast scheduler keeps updating the data on the Sales Forecast dashboard. After the users, groups and opportunity data are added, along with selection of category, select Update Forecast on Sales Forecast dashboard to view the latest forecast information.

Viewing the Sales Forecast dashboard

You can view the Sales Forecast dashboard to see the current sales status and targets achieved for your teams. Only Forecast Admin, Forecast Analyst, and the owner of the highest group can see the data and sales forecast for all the groups and the team. Other personas can only view the sales forecast and related information for their own hierarchy or for the hierarchies below them.

Using the Sales Forecast dashboard

To access the Sales Forecast dashboard, navigate to **CSM/FSM Configurable Workspace** and select the **Sales Forecast** view. Select the refresh icon to see the latest sales forecast data. Select **Update Forecast** on the dashboard to fetch the data to generate the latest forecast information.



Owner	Quota	Won	Gap	Commit	Strong Upside	Upside	Pipeline
FY 2025 Q1							
Global (Jennifer Harris)	$7,000	$1,900	$5,100	$3,100 (44%)	$3,100 (44%)	$4,100 (59%)	$5,090 (73%)
EMEA (Mary White)	$2,000	$0	$2,000	$1,200 (60%)	$1,200 (60%)	$1,200 (60%)	$1,200 (60%)
North America (Scarlet Dawson)	$3,000	$1,900	$1,100	$1,900 (63%)	$1,900 (63%)	$2,900 (97%)	$2,900 (97%)
Canada (Mathew Moore)	$1,500	$1,900	$400	$1,900 (127%)	$1,900 (127%)	$1,900 (127%)	$1,900 (127%)
Charlotte Turner	$1,500	$1,900	$400	$1,900 (127%)	$1,900 (127%)	$1,900 (127%)	$1,900 (127%)
USA (Michael Green)	$1,500	$0	$1,500	$0 (0%)	$0 (0%)	$1,000 (67%)	$1,000 (67%)
APAC (Jessica Clark)	$2,000	$0	$2,000	$0 (0%)	$0 (0%)	$0 (0%)	$990 (50%)

Select the options from these three filters to view the data for your group or manager for a selected time-period.

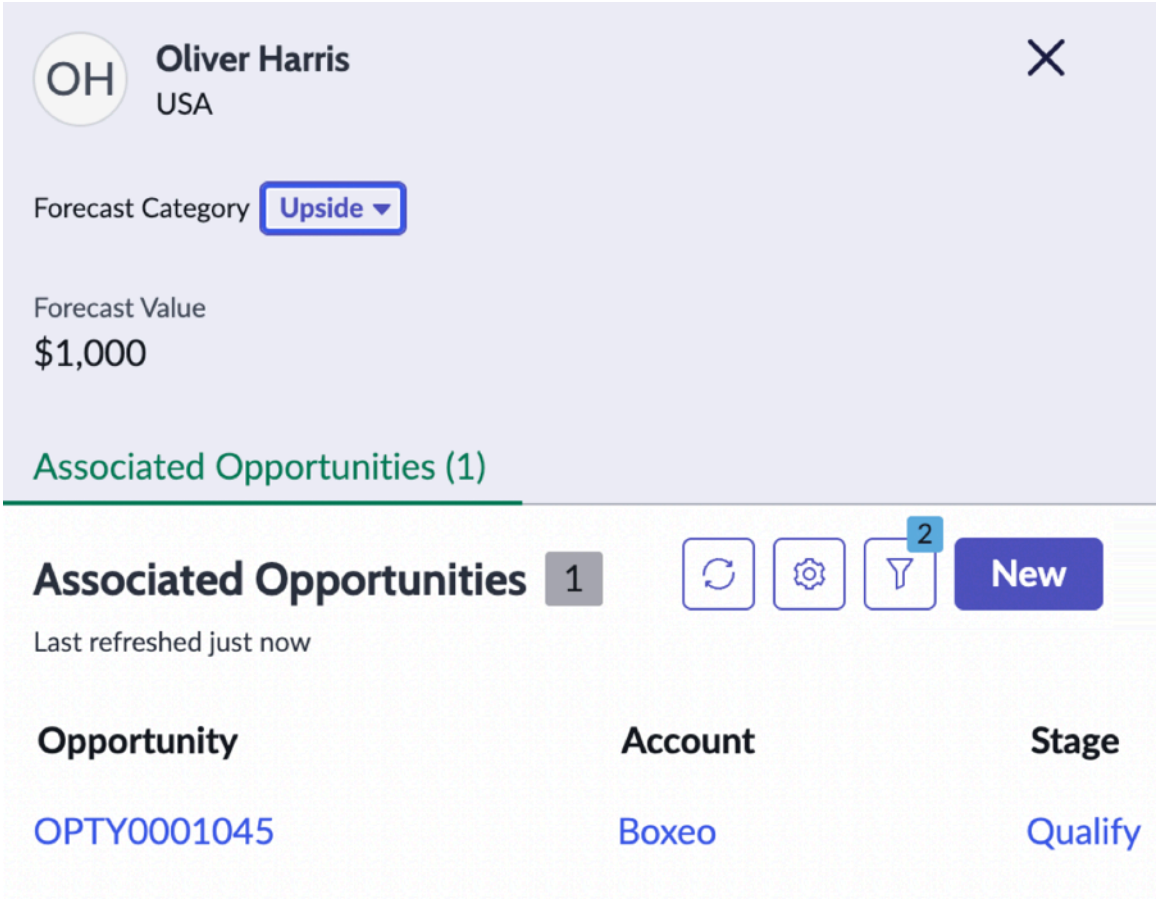
- Group: Select the group for which you want to view the forecast, the manager of the group is automatically updated in the third filter.
- Manager: Select the manager to see the field.
- Period: Select the period (quarter) for which you want to view the forecast.

For the above screenshot, the forecast data is being shown for the Global region. The owner of the forecast is Jennifer Harris. The forecast period selected is FY 2025 Q1. Global has a total quota of $7,000 assigned to it. Gap is the difference between the Quota and Won sales. For Global, the gap is $5,100, meaning they need to achieve an additional $5,100 to meet the quota. As the owner of this group, Jennifer Harris can track the quota achieved for each team and specific agent if required.

Commit, Strong Upside, Upside, and Pipeline represent different stages of certainty in the sales pipeline, helping to estimate the likelihood of achieving the overall target. As a manager, you can expand and see the total amount of opportunity in each stage for your team and agents. you can see the roll up amount for all the agents under that manager. The Canada group with the owner as Mathew Moore in FY 2025 Q1 displays that team's quota has been set at $1,500. The agent

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working under the owner is Charlotte Turner who has already closed (Won column) $1,900 in sales. You can click the “i” icon for an agent and view all the opportunities for that agent and the total value in each forecast category.



As a sales representative, you can view the status of each opportunity that you own. As the sale progresses, you can update the Forecast Category field of the opportunity, and the new data will be updated on the dashboard. You can view the total amount in each sales stage and track the status of the quota target assigned to you.

Using Quote Management

Use the Quote Management application to build your quote. Quotes can be used for quote generation or sales agreement generation. The interface includes the following tabs to help you create and manage product quotes.

Quote Management tabs

Quote Management tab	Description
Details tab	Add details of the quote, such as address and contact information.
Line Items tab	View the line items of the quote.
Catalog tab	Use product catalogs to add products to your quote.
Revisions tab	View the revisions of the quote.
Customer Orders tab	View the orders generated from the quote.
Pricing adjustment tab	View the price adjustments applied to the order lines.

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Building quotes

Use these basic steps to create, build, and manage your quotes.

Building and managing quotes

Step	Description
Create a quote	Start a quote, then add and view quote details.
Add products to a quote	Build your quote by adding products from the product catalogs.
Create a quote PDF document	Sales agents can create a PDF document from a quote to send to customers.
View and update products in your quote-	Use the Line items tab to see and update products in your quote.
View and update manual pricing adjustments in quotes	Add pricing adjustments to quotes.
Get additional product offering recommendations for quotes	Use product offering recommendations to find other products that you can upsell or cross-sell to your customers based on the line items in your quote.
Create quote versions	Use the Revisions tab to create and view versions of a quote.
Convert quotes into orders	Use the Customer Orders tab to convert quotes to orders.

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 dialog box prompts you for quote information. You can choose to create a quote for a customer account or consumer. The dialog box 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 **Quotes** > **All** and select **New**.
3. In the Create new quote window, fill in the fields.
4. You can either:

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a. Select **Add Line Items** to save the quote and continue adding products to the quote; or

b. Select **Save and close** to add products at a later time.
The quote is saved and you return to the **Quotes** list view.

5. Select refresh to see the new quote in the list.

What to do next
Add and view details of a quote.

The follow scenarios are possible when a user starts a quote:

- The system defaults sales agreement on the quote to the latest active sales agreement available for the customer, if one exists.
- The sales agreement can be changed or cleared when appropriate.

Add and view details of a quote

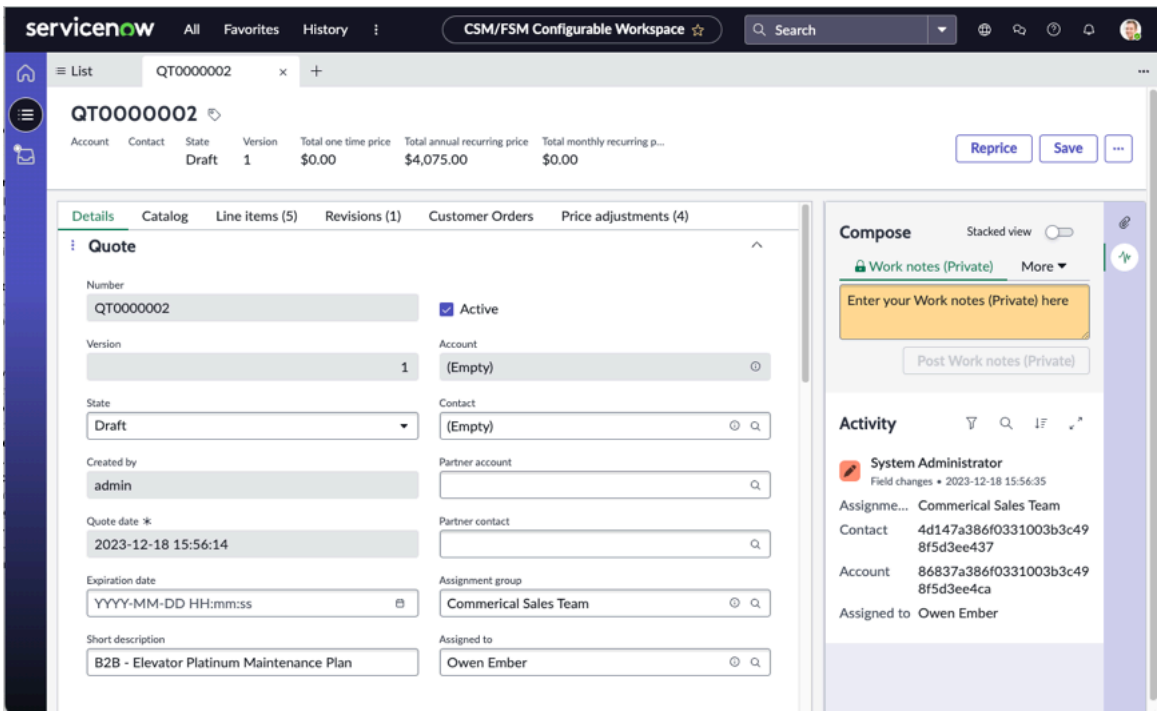
Use the Details tab to add and view basic information for a quote.

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 CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select your quote.
3. In the Details tab, fill in the basic information.



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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	Options that reflect 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.
Pricing fields	The fields are: ○ 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.

4. Select **Save**.

What to do next
Add products to a quote vb.

Add products to a quote

Use the Catalog tab in 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 have options for customizing the product by using the product configurator.

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Note:
Check your entitlements to see if the product configurator is available.

Procedure

1. In the CSM Configurable Workspace, select the **List** view .
2. Navigate to **Quotes** > **All** and select the quote that you want to work with.
3. Select the **Catalog** tab.
4. In the product catalog hierarchy, select the product catalog that you want to use.
   The product catalog displays the available products in product offering cards.
5. In the product offering card, select the product.
   - For a simple product that doesn't have any selectable options, select **Add**.
   - For a configurable product that has options that you can choose, select **Customize** to open the product configurator for selecting product options.

     As you configure the product, you can reprice, validate, and then save your selections. For details on using the product configurator, see Using Sales Customer Relationship Management applications.

   The product offering is added to the quote as a line item.

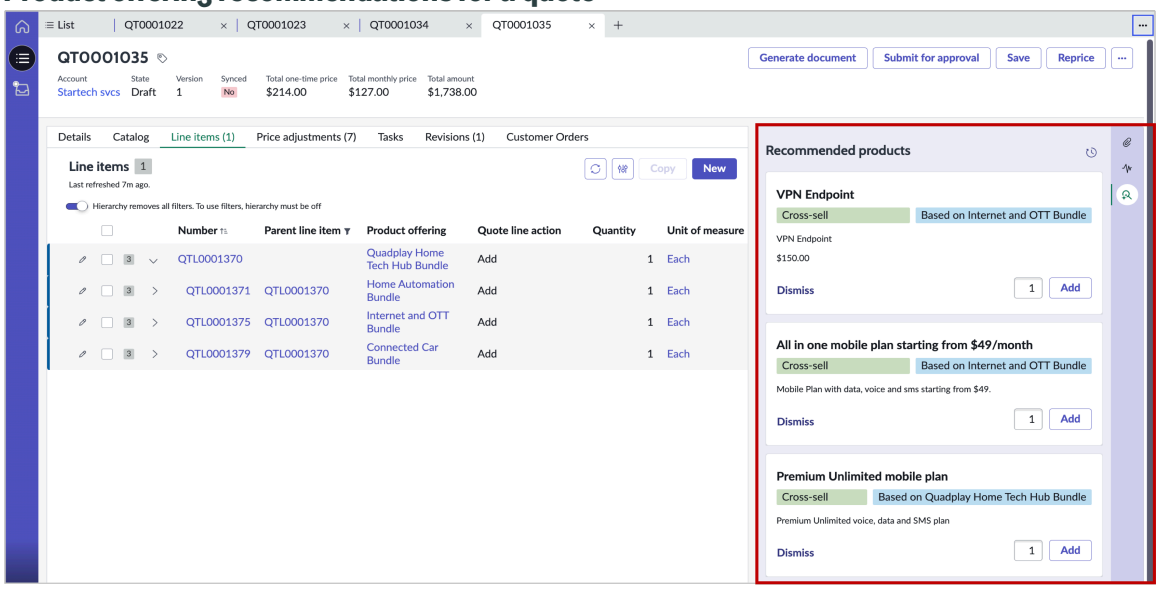
Using product offering recommendations in quotes

As a sales agent, you can use recommended product offerings to upsell or cross-sell additional products in your quotes.

Product offering recommendations

Product recommendations appear as cards in the contextual side panel in the CSM Configurable Workspace when you're adding, updating, or viewing quote line items using the Catalog or Line items tab. Each card provides a recommendation to either upsell or cross-sell a product.

Product offering recommendations for a quote



Product recommendation cards display the following information:

- Name and brief description of the recommended product offering.
- Type of recommendation:

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  - Upsell: Sales strategy for upgrading customers to a better or enhanced version of a product that they're buying.
  - Cross-sell: Sales strategy for selling additional products that are related to but different from the items that customers are buying.
- Source product offering to which the recommendation applies.
- Product pricing
- Options to accept the recommendation and set the product quantity or dismiss the product offering recommendation.

When multiple cards are displayed, they're arranged in the order value that was set when the recommendation was created by your product catalog admin.

Recommendation process

When you add a product recommendation, the recommended product offering is added as a line item to your quote. For more information, see Get additional product offering recommendations for quotes. After you add or dismiss recommendations, they’re moved to the recommendation history. Use the History ( ) icon in the Recommended products panel to view the recommendation history.

Get additional product offering recommendations for quotes

Get product offering recommendations to upsell or cross-sell additional products in quotes.

Before you begin

Your quote must have at least one or more line items and be in the draft state.

Role required: sales_agent

About this task

When you're working on a draft quote and adding or updating products, product offering recommendations are displayed as recommendation cards in the contextual side panel of your workspace. These cards identify the products that you can upsell or cross-sell, to complement or supplement existing products in your quote. When you accept a product offering recommendation, the product is added as a line item to your quote.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All** and select the quote that you want to work on.
3. Select the Catalog or Line Items tab.
   If the quote doesn't have at least one line item, add a line item.

   The contextual side panel displays any relevant recommended products for the quote.
4. Review the recommended product offering cards and do one of the following:
   - To accept a recommendation, change the quantity if needed and select **Add** in the card.

     The product is added as a line item to the quote. When a configurable product is added from the recommendations panel, quote line items are created with default selections configured as set in the product offering definition. The product offering card is moved to the recommendation history.

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- To remove a recommendation from the side panel, select **Dismiss**.

  The product offering card is moved to the recommendation history.

You can review the recommendation history by selecting the History ( ) icon in the Recommended products panel.

5. **Optional:** Continue reviewing the recommended offering cards and add or dismiss them as needed.

Related topics

Configuring product offering recommendations

Create a product offering recommendation

Add tasks to a quote

Create a single or multiple tasks for a quote and assign those to different agents. Tasks are the various actions that agents perform to create a quote.

Before you begin

Role required: sales_manager

Procedure

1. In the CSM Configurable Workspace, navigate to the **List** view and select **Quotes** > **All**.
2. Select the quote that you want to work with and select the **Tasks** tab.
3. Select **New** to start a new quote task or select an existing quote task to make changes.
4. Fill in the fields in the Quote Task form.

Quote Task form

Field	Description
Number	System-generated number of the quote task.
Quote	Number of the quote.
Due date	Date by which the quote task has to be completed.
Short description	Information about the quote task.
State	State of the quote task.
Assigned to	Name of the sales agent to whom the sales manager has assigned this quote task.
Work notes	Additional information about the quote task.

5. Select **Save**.
   The quote task is added to the main quote.

Create quote versions

Use the Revisions tab to create and view the versions of your quote.

Before you begin

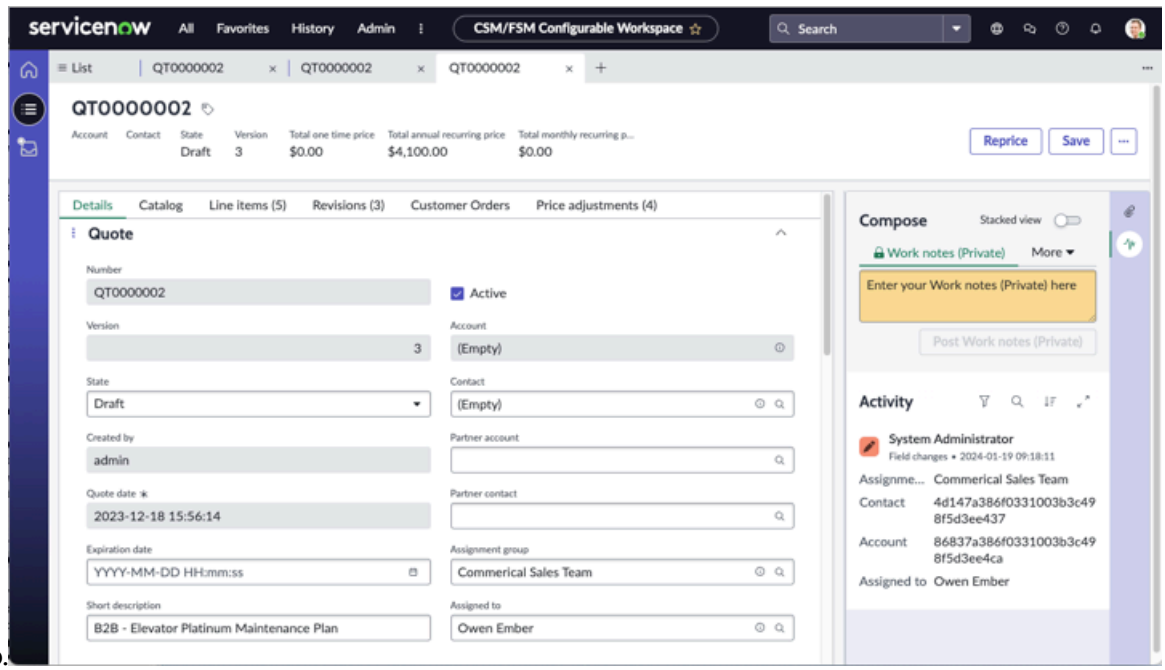
Role required: sales_agent

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About this task
The Revisions tab shows all the versions of a quote. Version numbers are sequential. If the quote is active, the **Active** field is selected.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Select **QuotesAll**.
3. Select the quote that you're working with.
4. Select the **Revisions** tab.



5. Select the **More Actions** icon and select **Create new version**.
   A new version of the quote is created. Select the quote in the message to open the new version. The **Active** option, if selected indicates the **Active** version of the quote. Use the Revisions tab to view a list of all the current quote versions. Version numbers are sequential.
6. Return to the **Quote** list view and refresh the view to see the latest version created.
7. Select the **Active** option 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 for more information.

Convert quotes into orders

Use the Customer Order tab to convert a quote into a customer order in Quote Management.

Before you begin
Role required: sales_agent

About this task
The quote must be in an Active state and the quote state must be set to Completed. Then the Customer Orders tab becomes active.

Note:
Verify your entitlements to see if you have access to this feature.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view  .
2. Navigate to **Quotes** > **All**.
3. Select the quote that you want to convert to a customer order from the **Quote List** view.
4. In the Details tab, change the quote State to **Completed** and select **Save**.
5. Select **Create Order**.
   When the order is created, a message appears with the order number.
6. Select the Order number in the message to open the order.
   The **Order Line Item** view displays the order line items, pricing adjustments, and order tasks.

View price adjustment breakdown on a quote line item

Sales agents can view the price adjustments that were applied to the base price in the price list to reflect discounts, surcharges, or other pricing strategies, and see how the net price was calculated while processing a quote.

Where to find the price adjustment details

The unit base price, unit list price, and unit adjustment details are listed on the **Pricing** section of the Quote Line Item Details page.

The Price Adjustments tab on the quote line item provides the following information.

Price Adjustments tab for a quote line

Field	Description
Number	ID of the price adjustment record.
Short description	Description of the price adjustment.
Sequence	Number of the pricing plan step used to generate the adjustment.
Adjustment source	Origin of the price adjustment. • Auto: Adjustment applied automatically by pricing plan, and can be defined using standard adjustment matrices or via extension points, such as PricingAdjustmentExtensionPoint. • Manual: Adjustment made by agent.
Adjustment type	• Markdown % • Markdown amount • Markup % • Markup amount • Price override
Price point	Price that is calculated after the adjustment is applied. This could be the List Price or Net Price.
Adjustment value	Percentage or absolute amount of adjustment that is applied to the price.

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Price Adjustments tab for a quote line (continued)

Field	Description
Quantity	Quantity of items in the quote line.
Amount	Adjustment applied to the original price in currency format.
Total amount	Quantity multiplied by the amount.
Unit running price	Unit price after applying the adjustment to the quote line.

Price adjustment example

To understand price adjustment and the terms used, let's consider a scenario where a customer is purchasing an API Edition license from a provider.

- Unit Base Price: The price defined in the Price List, say $1000.
- Attribute Adjustment: The customer opts for the "Professional Plus Edition" version of the product with Price Point as List Price which costs them additional $200.
- Volume adjustment: The customer receives a discount of $50 when they purchase 100 licenses. Here as well, the Price Point is the List Price.
- Price Point: The Price point is the entity on which the price adjustments were applied. It could be the List Price or Net Price.
- Unit List Price: The Unit List Price is calculated as $1000 + $200 - $50 = $1150.
- Customer also receives a premier account discount of $100 with Price Point as Net Price.
- Unit Net Price: The Unit Net Price is the final price after all adjustments have been applied. This is calculated as $1150 - $100 = $1050.

Related topics

Configurable pricing plans

Add pricing adjustment to a quote line item

Add pricing adjustments to quote line items after the line item is created.

Before you begin

Role required: sales_agent

About this task

You can make the following types of pricing adjustments for quote line items as a way to incentivize customers during the quote process.

Types of pricing adjustments

Adjustment type	Description
Markdown %	Percentage for a markdown in price.
Markdown amount	A dollar amount of a markdown in price.
Markup %	Percentage for the markup in price.

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Types of pricing adjustments (continued)

Adjustment type	Description
Markup amount	A dollar amount for a markup in price.
Price Override	Overrides the product price with a new price.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All**.
3. In the Line items tab, select the quote line item for a pricing adjustment.
4. In the adjustment dialog, use the Adjustment type menu to select an adjustment type.
5. Enter an adjustment value in the Adjustment value.
6. Add a description of the price adjustment.
7. Select **Save**.

Set contract dates and term

You can set contract pricing to a quote or quote line items including start and end dates in Quote Management. After the dates are set on the quote header, the new line items will be defaulted to those dates.

Before you begin
Role required: sales_agent

About this task
Contract pricing is a pricing model where customers pay a recurring fee for products or services, typically at regular intervals such as monthly or annually.

In a quote, you can set the contract pricing start date and end date, or you can enter a term and the contract end date is automatically calculated.

Contract pricing can be added at the quote header level or at the quote line item level.

See Subscription revenue metrics for more information about how subscription pricing works.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**
3. Select the quote that you're working with.
4. In the **Quote Details** tab, add a **Contract pricing start date** and a **Contract pricing end date**. When the dates are entered, the following information automatically updates.

Field	Description
Total monthly recurring price	Shows the monthly recurring price based on the dates entered in contract pricing.
Total annual recurring price	Shows the total annual recurring contract pricing based on the dates entered.

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Field	Description
Total amount	Shows the total amount of the contract pricing according to the subscription pricing start and end dates.
Term	Shows the number of months the subscription is valid based in the start and end dates.

5. Select **Save**.

Create an order from a quote line item

Create orders from quote line items by using the **Create new order** UI action.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select **List** view and select **Quotes** > **All**
2. Select the quote, which must be in the Completed state, and select the Line items tab.
3. Select a quote line item and select **Create new order**.
   A dialog box indicates the creation of a new order. Select the new order record to view it. Or you can also navigate to the Customer Orders tab to view the new order record.

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.

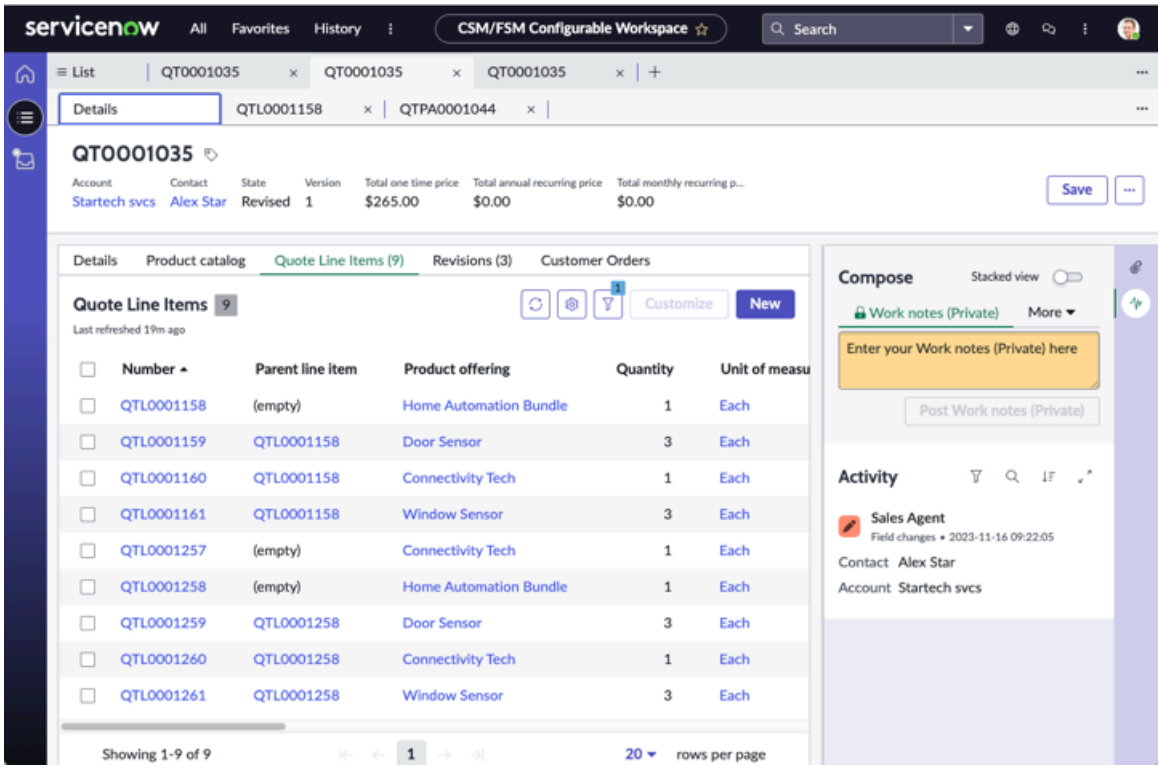
Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view and select **Quotes** > **All**.
2. Select the quote that you're working with and select the **Quote Line Items** tab.

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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.

Quote line item fields

Field	Description
Quote	Automatically generated field.
Number	Automatically generated field.
Parent line item	Automatically generated field.
Price list	Price lists are added to the product line item. Price lists show pricing that is already configured.
Term (months)	Monthly terms for the price list selected. Monthly terms reflect the cost monthly of the product or service.
Contract start date	Contract state date is the date a service contract or entitlement contracts start.
Contract end date	Contract end date is the date when a service contract or entitlement contract ends.
Product offering	Product offering let agents select the product or service for the quote.
Quantity	Quantity is the number of a product that is selected for the quote.
Unit of measure	Agents can select a unit of measure for products that come in quantities.

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Field	Description
Service location	Service location allows agents to select a location for the service that is added to the quote.
Short description	The description field for the service location, which provides information about the location such as address and phone number.

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 and update manual pricing adjustments in quotes for more information.

View and update manual pricing adjustments in quotes

Use the Pricing Adjustments tab in 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. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All** and select the quote that want to work with.
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.

Initiate a contract request

Initiate a contract request from the Quote Management application.

Before you begin
Role required: sales_agent

About this task
You can create a legal sales contract to finalize a deal and formalist the agreements with your customer.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All**.
3. Select the quote in the Completed state for which you want to create a contract.
4. Select the **More Actions** menu and select **Initiate contract**.
5. On the form, fill in the fields.

Field	Description
Type of paper	Type of paper to be used in the contract. Select Own paper.
Contract type	Type of contract to be generated. Select Sales Contract. If you want to generate a different type of document, select Other types of contract.
Signature type	Type of signature to do to complete the contract. ○ Electronic signature: You sign the document through electronic medium. ○ Wet signature: You download the document and sign it manually.
Start date	Date that the contract begins.
End date	Date that the contract ends. **Note:** The End date must be later than the Start date.

6. Select **Initiate**.
   A contract management request is generated in the Contract documents tab. Select the record to view the document.

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. In the CSM Configurable Workspace, select the **List** view.
2. Select **Quotes** > **All**.
   - All Quote- shows all the quotes in the instance.
   - My Quotes- shows your quotes.
   - My Teams Quote- shows the team quotes.
3. Select the quote that you're working with.

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4. Make updates to the quote as needed.
5. Select **Save**.

Export quotes

Export a list of all 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 quotes to generate sales agreements

Agents can use quotes to generate sales agreements that show the product and service lines and other relevant details for the quote.

Before you begin

Role required: pricelist_manager and sales_manager

About this task

A sales agreement is a document that outlines the terms and conditions of a sale between a seller and a buyer.

The agreement specifies the details of the transaction including the goods or services being sold, the price, the quantities, delivery terms, and any other relevant conditions, for a specific period.

Sales agreements filter the product catalog according to the agreement.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select **New**.
3. Add quote details to the quote and select **Enable sales agreement quote**.
   When the **Enable sales agreement quote** is selected, the quote is set on a sales agreement workflow. See Using Sales Agreement Management for more information.

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4. Fill in the **Sales agreement start date** and **Sales agreement end date**.
5. Select **Save**.
6. Use the **Catalog** tab to add quote line items to the quote.
   See Add products to a quote for more information.
7. Make other updates to the quote.
8. Once the quote is ready, select **Submit for approval**.
9. When the quote is at an **Approved** state, change the quote to **Completed** by either updating the **State** field or selecting the context menu and choosing **Mark as complete**.
   The quote is saved to a **Completed** state and the **Create sales agreement** button appears in the quote details form.
10. Select **Create sales agreement**.
    A sales agreement is created. The message displays the sales agreement number.
11. Select the sales agreement message to open the sales agreement.

Apply a sales agreement to a quote in Quote Management

Agents can add a sales agreement to a quote while they are building the quote. The sales agreements conditions are then applied to the quote.

Before you begin

Role required: sales_agent and sales_manager

About this task

A sales agreement is a contract to order a set of products and services for a set price. Sales agreements let agents move quickly through the quote process because the sales agreements establish the products and pricing for the quote.

- Sales agreement terms are defaulted for the quote.
- Price lists are defaulted based on the pricing terms in the sales agreement.
- The quote catalog is filtered for products and options by the terms of the sales agreement.
- Agents can configure product bundles for quotes with sales agreements.
- When a new revision of a quote is created, sales agreement references on quote header and quote line items are carried over to the revised quote.
- When an order is created from a quote, the sales agreement references on quote header and quote line items is carried over to the order.

Note:
Consumer quotes do not have sales agreement references present on quote header or quote line items.

See Using Sales Agreement Management and Create a sales agreement to learn more about creating a sales agreement.

Procedure

1. Navigate to **Quote** > **All-Quotes** and select the quote you're working with.
2. In the **Quote** form, find the **Sales Agreement** field and select the sales agreement you want.
3. Select **Save**.

   The sales agreement with its product offerings and price lists is added to the quote.

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Related topics

Sales Agreement Management

Configure Sales Agreement Management

Sync a quote with an opportunity

Agents can sync quote information with an opportunity to ensure that information is consistent between both applications in Quote Management.

Before you begin

Role required: sales_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quote** > **All-Quotes** and select a quote that you want to sync with an opportunity.
3. In the **Details** tab of the quote, go to the **Source Opportunity** option and choose the opportunity you want to sync with.
4. Select **Save**.
   The **Enable sync** button is enabled.
5. Select the **Enable Sync** option.
   Current Information and future changes to the quote are automatically synced. The following areas show the sync status.
   - The **Sync** check box shows that the quote is synced.
   - The **Sync** flag on the secondary header changes to **Yes**.
   - The **Synced** column in the Quotes related list on the Opportunity record shows **Yes** when sync is activated and **No** when the quote isn't synced.
6. Turn off automatic sync by selecting the **Disable sync** button.

Note:
When sync is enabled, the following conditions occur:

- No changes can be made to that opportunity (for example, adding line items, changing quantities).
- Additional changes should be made to the quote record.
- The opportunity record is updated asynchronously with the latest product offerings and prices that are added to the quote.
- The synced opportunity state changes to closed when the quote is marked as complete

Add covered products to a quote

Add a covered product to line items in a quote in Quote Management.

Before you begin

Role required: sales_agent or sales_manager

About this task

Covered products are products that are added to a warranty or entitlement. Once you add a warranty or entitlement to your quote line items, the covered product option becomes available.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quote** > **All** and select a quote to which a covered product is to be added.
3. From the **Quote line items** tab, select the quote line item.
4. Select **More** > **Covered product**.
5. In the **Covered Product** tab, select **New**.
6. In the **Create New Covered Product** form, select the covered product line item you want to add.
   There are three types of covered products types that you can add to a line item:
7. Select **Save**.
8. On the quote line item page, select the contract start date and the contract end date.
9. Change the state to **Complete**.
   A contract is created with the contract details for the order line.

Filter catalogs by location in a quote

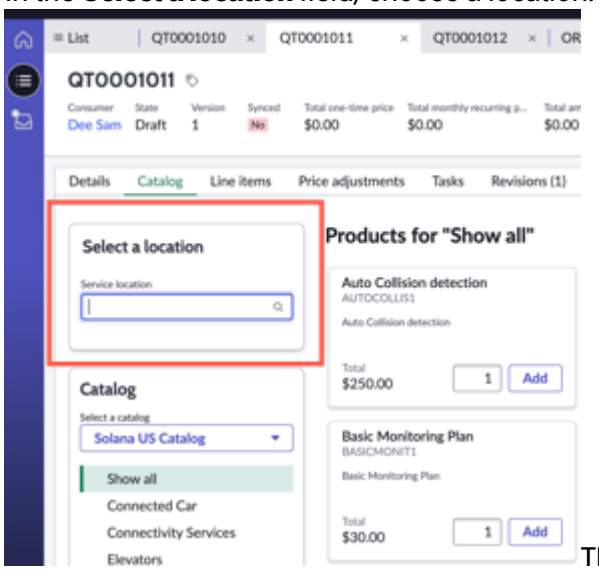
Use the location filter on the Catalog tab to filter products by location in Quote Management.

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 the quote that you're working with.
4. Select the **Catalog** tab.
5. In the **Select a location** field, choose a location.



The products in the catalog are filtered according to the selected location.

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Copy locations for quote line items

Use the copy location function to change the location of multiple quote line items in Quote Management.

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 the quote to work on and select the Line Items tab.
4. Select one or more quote line items that you want to copy to another location.
5. Select **Copy**.
6. In the **Copy line items** dialog box, choose one of the options.

> **Note:**
> Be sure to select **Continue to copy only eligible lines for this location (exclude ineligible)** within the **Copy line items** dialog box.
>
> This selection copies the eligible line items to your preferred location and skips the line items that aren't eligible. If the option isn't selected, no quote line items are copied if any line item is ineligible.

7. Select **Copy**.

Create a quote PDF document

In Quote Management, sales agents can create a PDF of a quote that can be sent to customers for review and signatures.

Before you begin

Role required: sales_agent

About this task

https://player.vimeo.com/video/1098616753?h=1be5725ef1&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

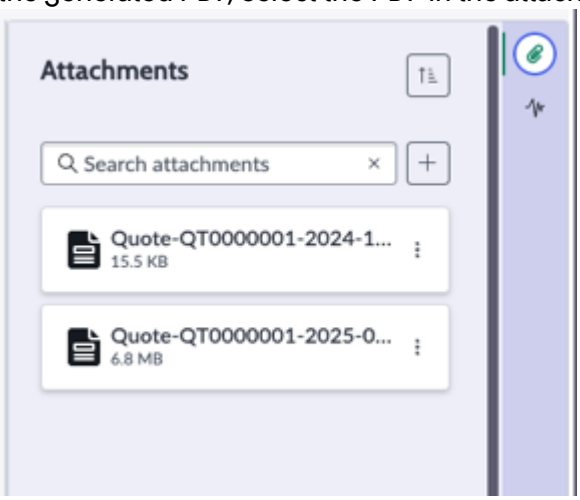
1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Quotes** > **All**.
3. Select the quote that you're working with.
4. On the **Details** tab, go to **Quote Document Details** and fill in the fields.

Option	Description
Document template	A document template is required to create a quote document PDF. A standardized tem plate is included with the base system. Select the template that you want. See Set up PDF

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Option	Description
	document templates for more information about how to create customized templates.
External signer	Option that enables you to have the quote document signed by someone outside the or ganization. See Set up PDF document sign ers for more details on how to set up external signers. When you select **Send for signature**, the ex ternal signer's email address is used to send an email through Docusign for review and electronic signature.
Internal signer	Option that lets you select an internal signer for the quote. When you select **Send for signature**, the in ternal signer's email address is used to send an email using Docusign for review and signa ture. See Set up PDF document signers for more details about how to set up an internal signer.

5. Select **Save**.
6. In the Quote form, select **Generate Document**.
   The PDF document is generated and appears in the **Attachment** side window.
7. Select the attachment icon to open the attachments window.
8. Select the actions icon and choose an action for your PDF document.
   A message appears indicating that the PDF document was generated.
9. To view the generated PDF, select the PDF in the attachments window.



View a quote PDF document

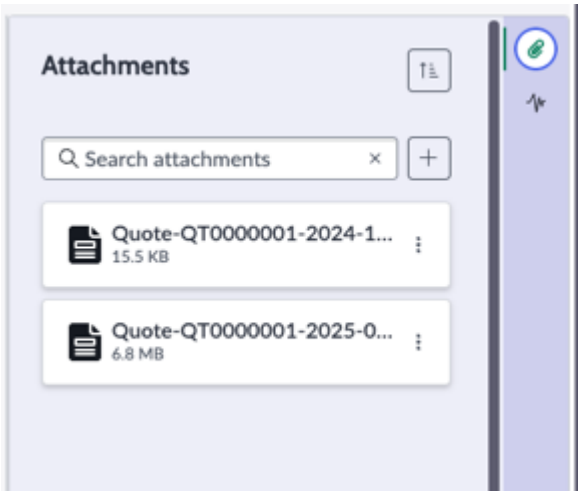
Agents can view quote documents in the PDF viewer window. The PDF viewer window has controls that enable agents to manage the PDF.

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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 the quote that you're working with.
4. In the **Attachments** window, select the PDF document to open it.



   The PDF document opens in the PDF viewer.
5. Use the PDF viewer controls to manage the PDF.

Use hierarchical list view for quote line items

Sales agents can view quote line items as a hierarchical list, which helps to view the parent and child relationship between line items.

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 the quote that you're working with and open the **Line items** tab.
4. Use the control to manage the line items.

Control	Description
Caret	Opens the hierarchical list view showing the child line items.
Pencil	Make additional configuration changes to the products in the line item.
Number 5	Shows the number of child line items contained in the parent line item.

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Control	Description
Filter	Filters line items.
Toggle	Toggles between hierarchical view and standard view.

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 enable a new sales agreement.
3. Select **Enable sales agreement quote**.

   After the sales agreement is created, a message displays the sales agreement number. The request tracker enables agents to monitor the progress of sales agreements creation. All the information on the sales agreement is captured from the selected quote.

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For more information, see Using quotes to generate sales agreements.

4. 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 a sales agreement. For more info, see Add a sales agreement to an order in Order Management.

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.

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.

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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.
   
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. In **Order action**, select **Add**.
   The **Order action** menu contains the following options.

Order Action	Description
Add	Creates an order.
Move	TBD
Change	Creates a change order. See Start a move order for more information.

5. 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 order lines for products or services using the product catalog and product configurator in Order Management.

Before you begin

Note:
Check your entitlements to see if the product configurator is available.

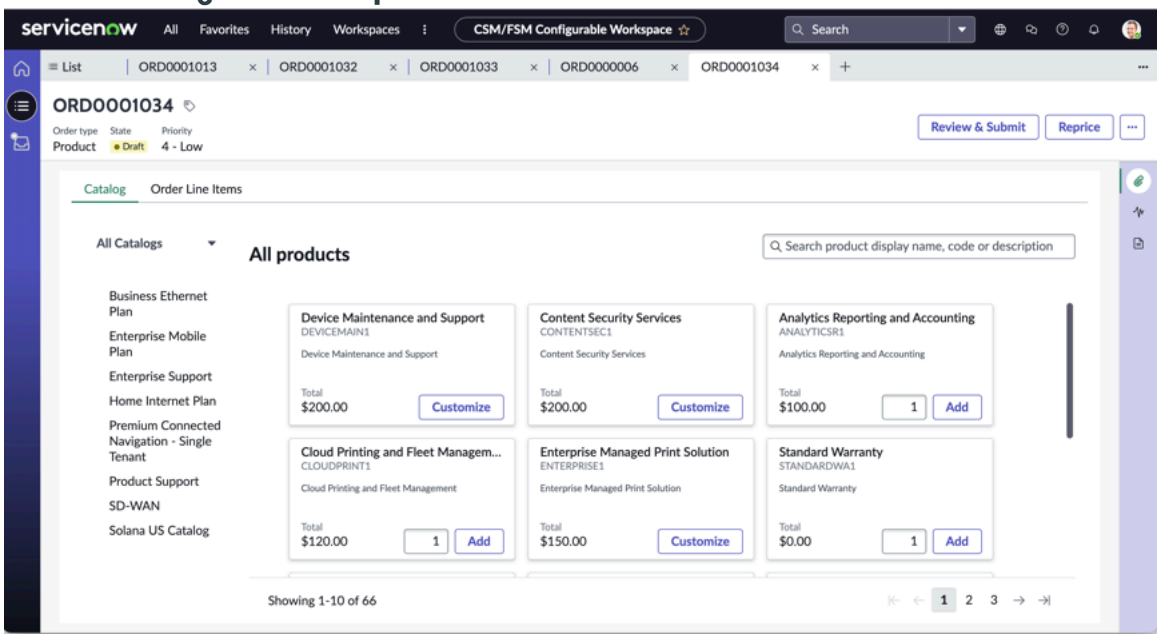
Role required: sn_ind_tmt_orm.order_agent

About this task

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.

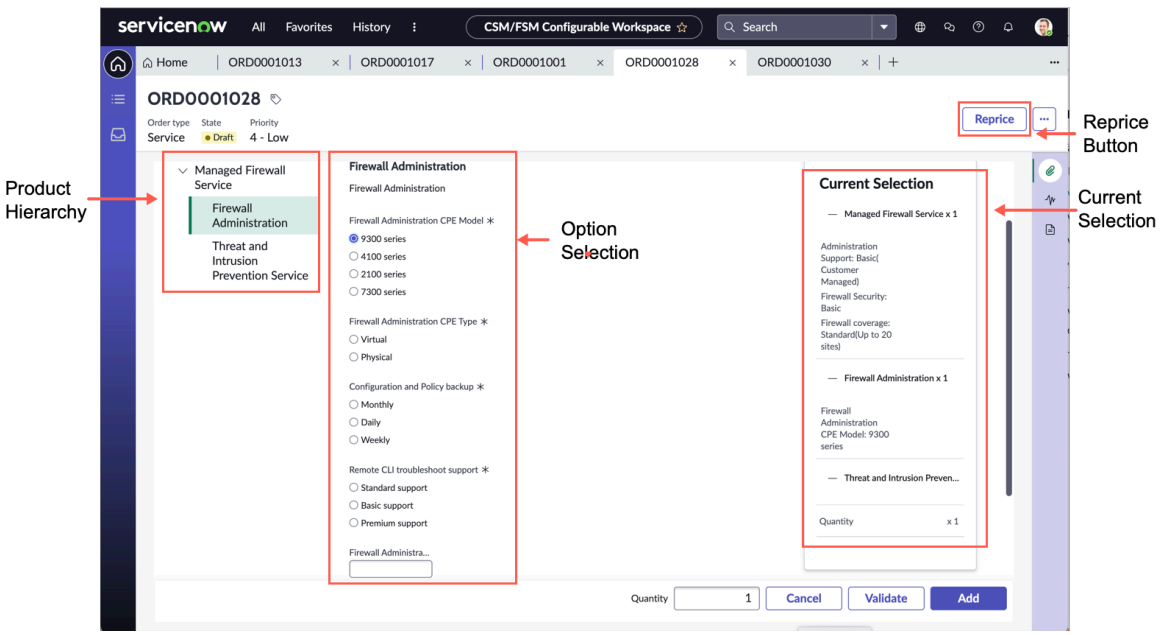
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Product Catalog used to add products to orders



Products with options have a **Customize** button that opens the product configurator, which lets you select product options.

Product configurator for selecting 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.

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4. Add products to your order.
   - Select **Add** to add a simple product (product with no options) to your order.
   - Select **Customize** to add products that have configurable options.

   The product configurator opens for choosing available options for the product or service. For details on the configurator interface, see Using Sales Customer Relationship Management applications. As you are configuring your product, you use the following options:

Product configurator options

Option	Description
Reprice	Resets the pricing and updates the total price when changes are made. If cascading pricing is enabled, pricing information is cascaded from parent to child line items. See Control cascading quantity values in child product offerings for more information.
Validate	Validates the product and prices when changes are made.
Add	Adds the product to the order after you've configured it.

   The product or service is added to the order as an order line item.
5. 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

Add a sales agreement to an order in Order Management

Add a sales agreement to your order. A sales agreement is a contract to order a pre-identified set of products and services for a set price.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task

A sales agreement is a contract to order a set of products and services for a set price. Sales agreements let agents move quickly through the order process because the sales agreements establish the products and pricing for the order.

- Sales agreement terms are defaulted for the order.
- Price lists are defaulted based on the pricing terms in the sales agreement.
- The order catalog is filtered for products and options by the terms of the sales agreement.
- Agents can configure product bundles for orders with sales agreements.

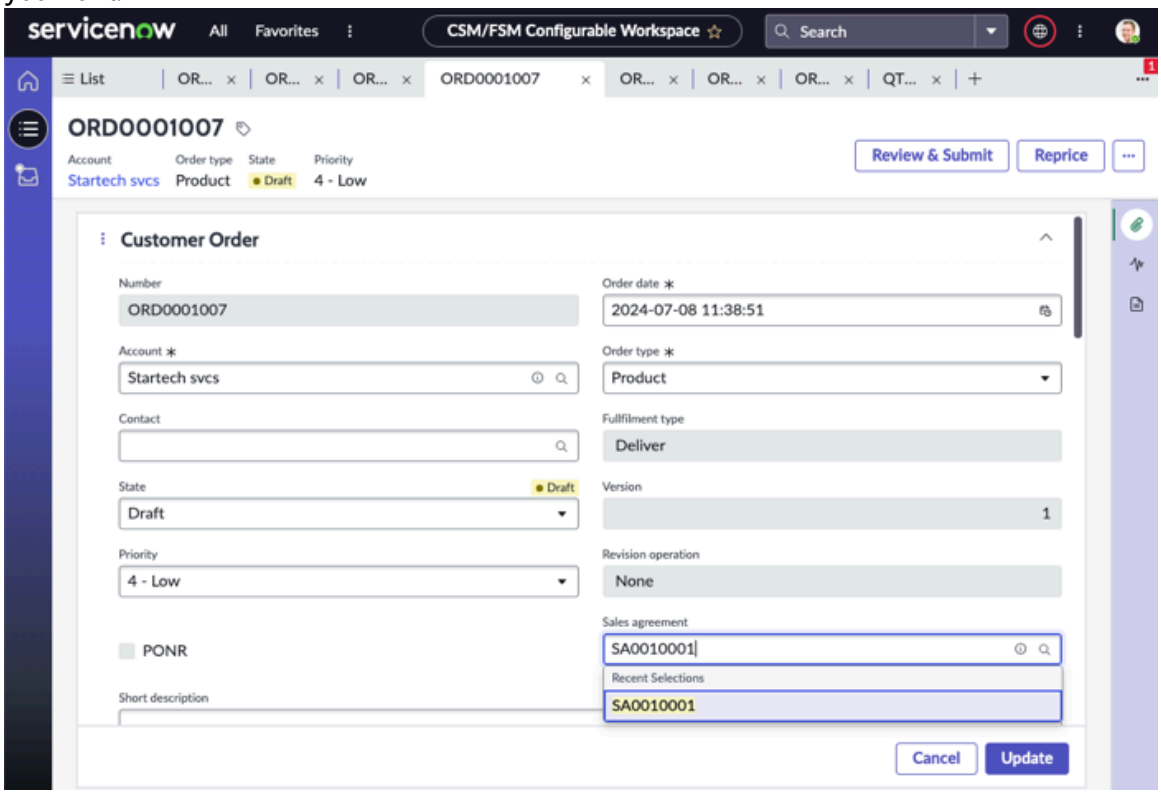
See Using Sales Agreement Management and Create a sales agreement to learn more about creating a sales agreement.

Procedure

1. Navigate to **All** > **Customer orders** > **All** and select the order you're working with.
2. Navigate to the Order Details tab by selecting the more icon  and choosing **Order Details**.

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3. In the **Customer Order** form, find the **Sales Agreement** field and select the sales agreement you want.



4. Select **Update**.
   The sales agreement with its product offerings and price lists is added to the order.

Related topics

Sales Agreement Management

Configure Sales Agreement Management

Add subscription pricing to an order

Add contract pricing to an order or order line items including start and end dates in Order Management.

Before you begin

Role required: sn_ind_tmt_orm.order_agent

About this task

Subscription pricing is a pricing model where customers pay a recurring fee for products or services, typically at regular intervals such as monthly or annually.

In an order, you can set the contract start date and end date, or you can enter a term and the contract end date is automatically calculated.

Subscription pricing can be added at the order header level or at the order line item level.

See Subscription revenue metrics for more information about how contract pricing works.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Orders** > **All**

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3. Select the order that you're working with.
4. In the **Order Details** tab, add a **Contract start date** and a **Contract end date**.
   When the dates are entered, the following information automatically updates.

Field	Description
Total monthly recurring price	Shows the monthly recurring price based on the dates entered in subscription pricing.
Total annual recurring price	Shows the total annual recurring subscription pricing based on the dates entered.
Total amount	Shows the total amount of the subscription pricing according to the contract start and end dates.
Term	Shows the number of months the subscription is valid based on the start and end dates.

5. Select **Save**.

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.

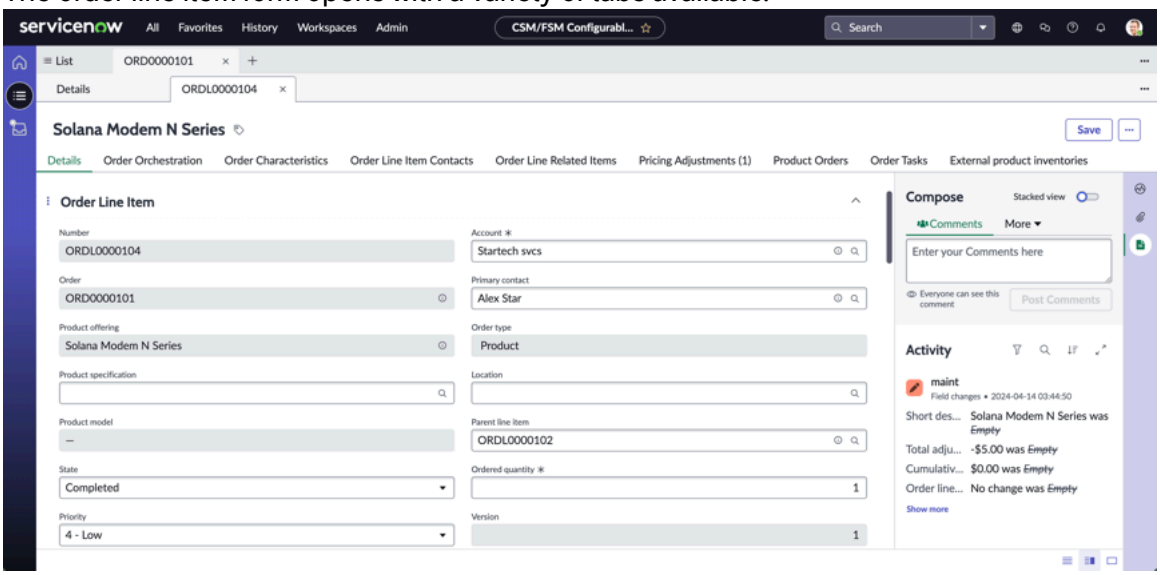
- Details - shows the details of the order including the name and address fields for the order.
- Order Orchestration
- Order Characteristics - add characteristics to a product and service orders.
- Order Line Item Contacts - add a contact for each product order line item.
- Order Line Related Items - 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.

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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.
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.

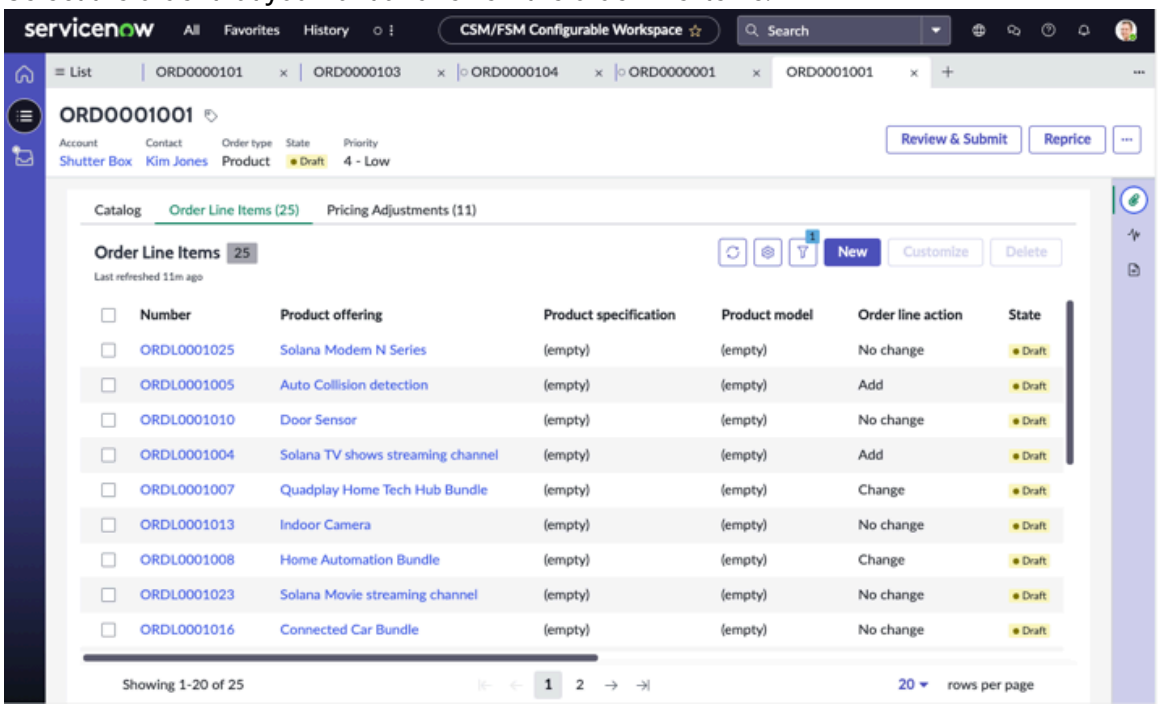
Before you begin

Role required: sn_ind_tmt_orm.order_agent

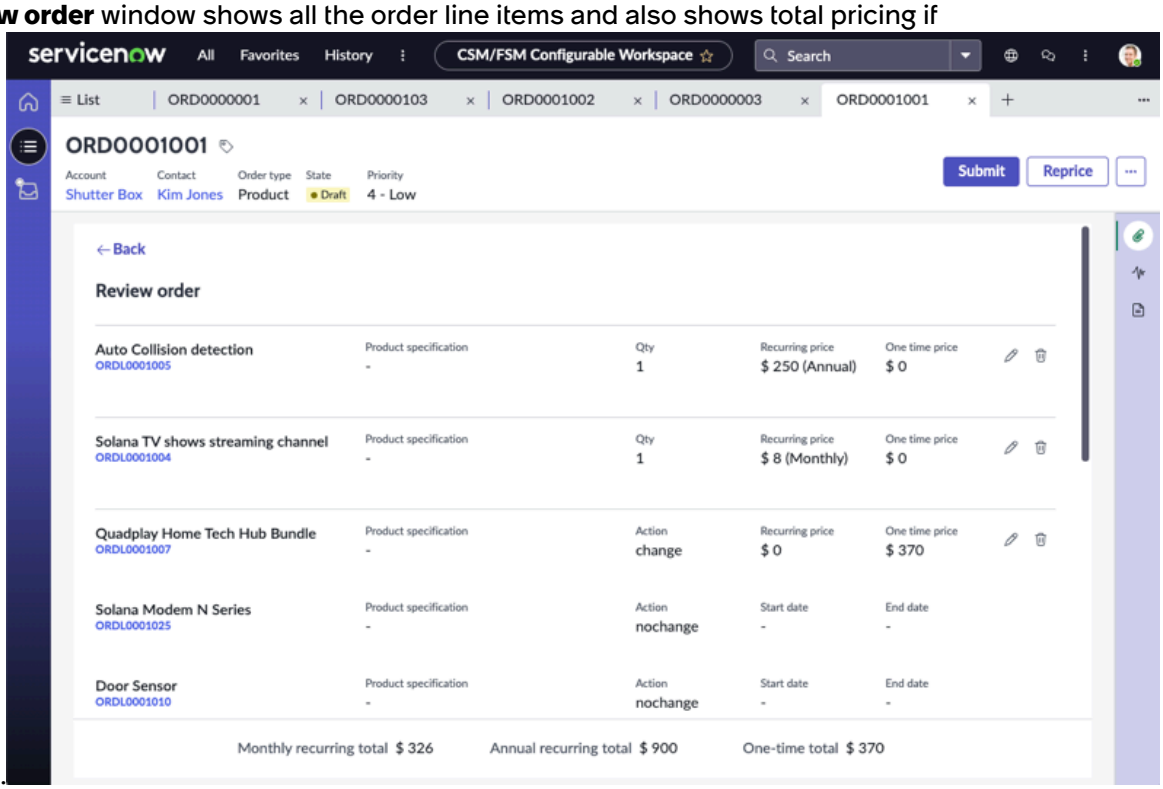
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Procedure

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.



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 applicable.



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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

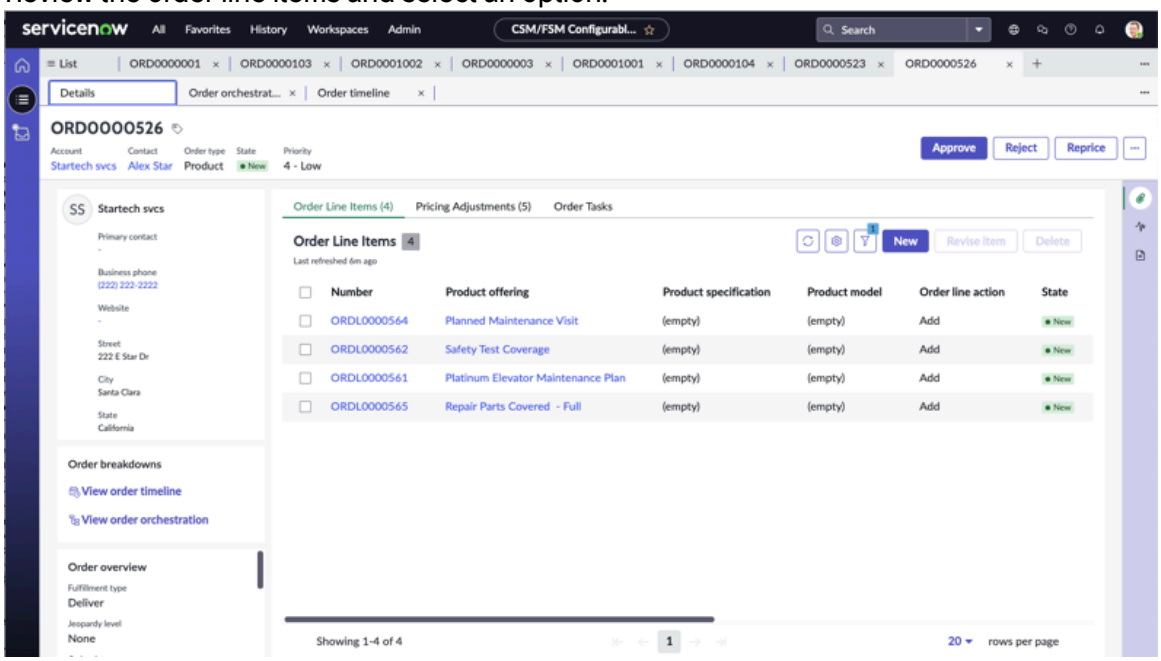
When an order is submitted, the next step is to review the order and approve it. Approved orders are ready to begin the fulfillment process in Order Management.

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 want to review and approve.
   Orders ready for approval are in a **Submitted** state.
4. Review the order line items and select an option.



Options in Order Line Items page

Options	Description
Approve	Approve the order. The order is updated to **In progress** state while it is being validated, before it enters fulfillment.
Reject	Reject the order. The order state changes to **Rejected**. Rejected orders are made available to order agents to make changes and updates.
Reprice	Recalculate prices when updates are made to the order line items.

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Options	Description
New	Add a new order line to the existing order.
Revise item	Make changes to selected order line items.
Delete	Delete selected order line items. The line items are deleted and the prices are recalculated.

5. Select **Approve**.
   The order is approved and the order state changes to **In progress**.

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 can 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

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

Batch specification version update

A set of specification versions can be updated using the batch specification utility in Sales Customer Relationship Management. The specification can also be scheduled.

What to do next

Configure update specification versions

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Configure update specification versions

Configure specification version updates so that product specification versions can be updated to reflect changes and updates.

Before you begin
Role required: system_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.
   If the system property record is 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.

Batch update for product specification versions

Use the inventory batch update job to update product specifications when changes occur from one version to another.

Before you begin
Role required: product_catalog_admin and product_catalog_manager

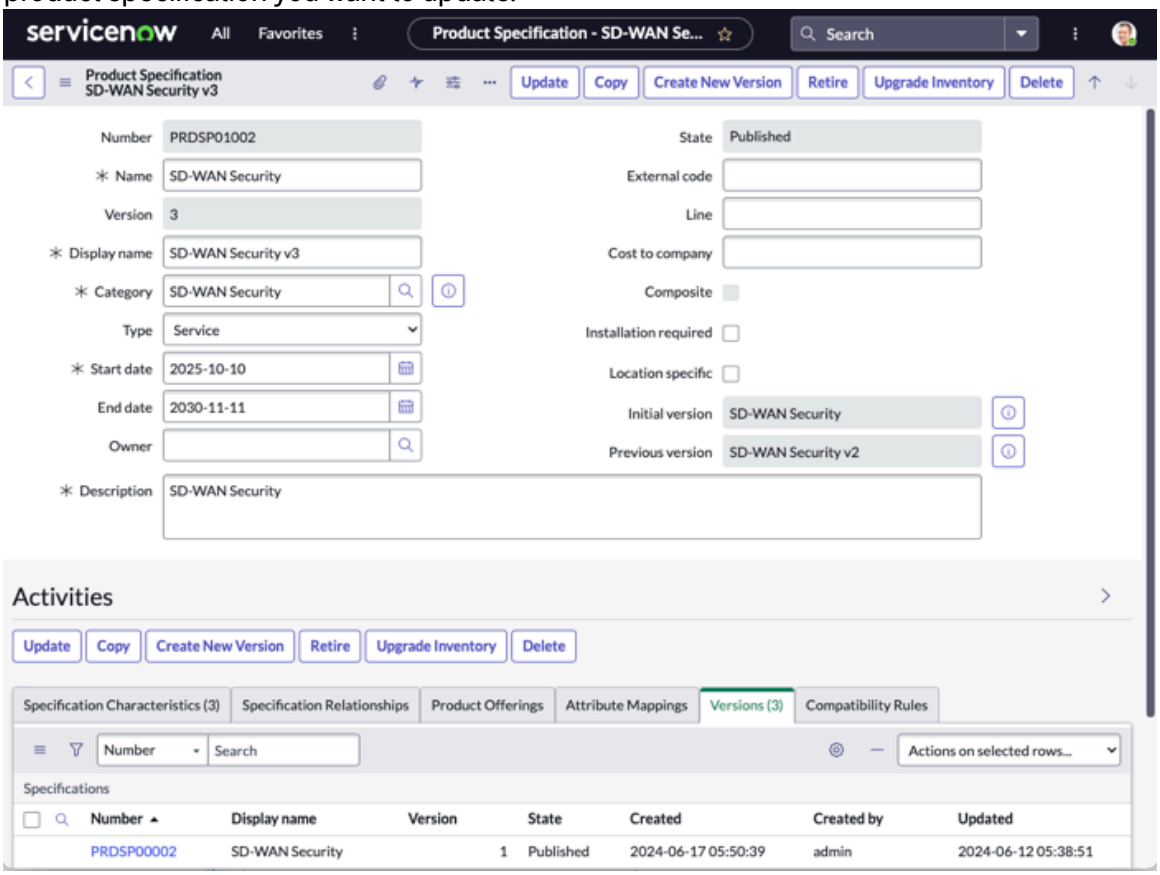
About this task
Batch inventory specification update lets catalog admins and product managers create an on-demand job that triggers a batch specification version update. The update doesn't create change orders but directly updates product inventory in orders. Batch updates also create a log that including errors.

There are two steps to perform this process. The first is to update the specification version from the source version to the target version. The second step is to run an inventory upgrade job.

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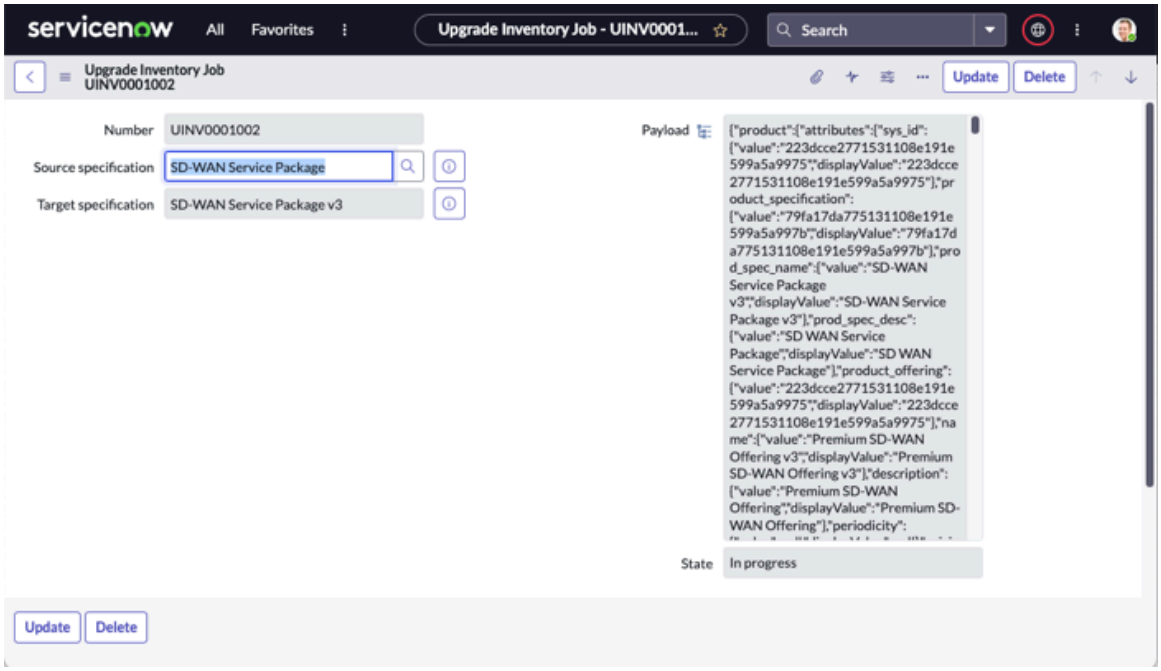
Procedure

1. Navigate to **All** > **Product Catalog Management** > **Product Specifications** and select the product specification you want to update.



2. Select the **Create New Version** button to create a version of the specification.
3. Select **Publish** to publish the specification version, then select **Update** to update the specifications to add the new version.
   Now there are two published versions of the specification. The initial version is considered the source version and the v2 version is considered the target version.
4. To start the version update on existing product inventories, select **Upgrade Inventory** and select **Yes** at the prompt.
   The job is created for the source specification as v1 and the target is automatically populated as the latest published version of the source specification. The inventory upgrade job starts and runs a series of validation steps to confirm the job runs successfully. When the validation is complete, the job enters an **In progress** state. If an error occurs, the job status turns to **Error**.
5. Navigate to **All** > **Inventory upgrade job** and select the job you're working with to view the status of the job and address any errors.

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6. Navigate to **All** > **Inbound queue** > **Inbound requests** and select the record id you're working with to view the status.
   The number of inbound queue requests indicates the number of product inventories that matched the source specification. Once all the inbound queue records are processed, the request creates a change order for each of the inbound queue records processed successfully.

View upgrade inventory job status

View the status of a specification upgrade job using the upgrade inventory Job status list form.

Before you begin

Role required: sn_ind_tmt_orm.order_agentadmin

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Upgrade Inventory Jobs** and select **All**.
2. Select the inventory job that you're working with.

Entry	Description
Number	A system-generated number identifying the inventory job.
Target specification	The target specification that is going to be updated.
Payload	Payload is the specification data that is being added to the target specification.
State	Shows the state of the job.

3. Select **Update** to save any changes.

Start a move order

Start a move order to update product inventory location.

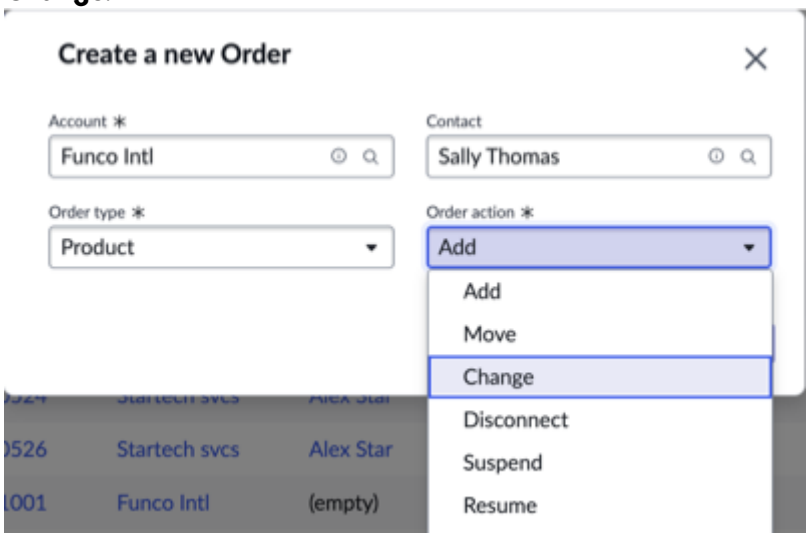
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Before you begin
Role required: sn_ind_tmt_orm.order_agent

About this task
A move order enables agents to change the location for product inventory at the order line level. The move order is executed using the change order function in Order Management.

Once the move order is started, the updated location is propagated to the selected inventory.

Procedure
1. In the **Configurable Workspace**, select the **List** view.
2. Open the order line item that requires an inventory location change and update the location field, then select **Save**.
3. Return to the **Customer Orders** form and select **New**.
4. In the **Create a new Order** dialog box, select an **Account** and then under **Order action**, select **Change**.



5. From the **Catalog**, select **Manage** to open the order line for the location change.
6. Navigate to the **location** field in the order line and update to the location.
7. Select **Update**.
8. Review the changes that you made and select **Review & Submit**.
   The change order is propagated through all affected order lines and order tasks.

Add covered products to order line items

Enhance orders by adding covered products such as contracts or entitlements at the order line level.

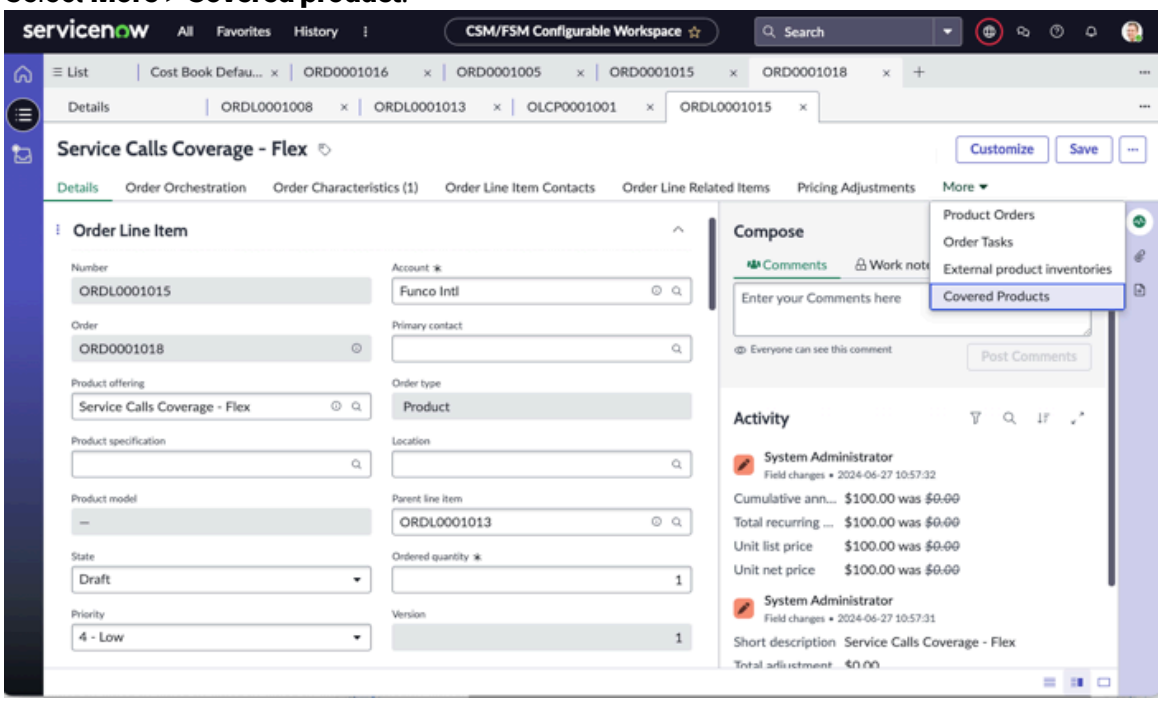
Before you begin
Role required: sn_ind_tmt_orm.order_agent or sn_ind_tmt_orm.order_manager

About this task
Order agents can add covered products like entitlements or contracts to an order line during the order capture process.

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Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Navigate to **Customer orders** > **All** and select the order that you're working with.
3. From the **Order line items** tab, select the entitlement or contract type of order line.
4. Select **More** > **Covered product**.



5. In the Covered Product form, select **New**.
6. In the Create New Covered Product form, select the covered product line item you want to add.
   There are three types of covered products types that you can add to a line item:
7. Select **Save**.
8. On the order line item page, select the contract start date and the contract end date.
9. Change the state to **Complete**.
   A contract is created with the contract details for the order line.

Filter product catalog by location

Agents can filter products in the catalog by using the location function in Order Management. The location filter helps agents be more efficient when creating orders.

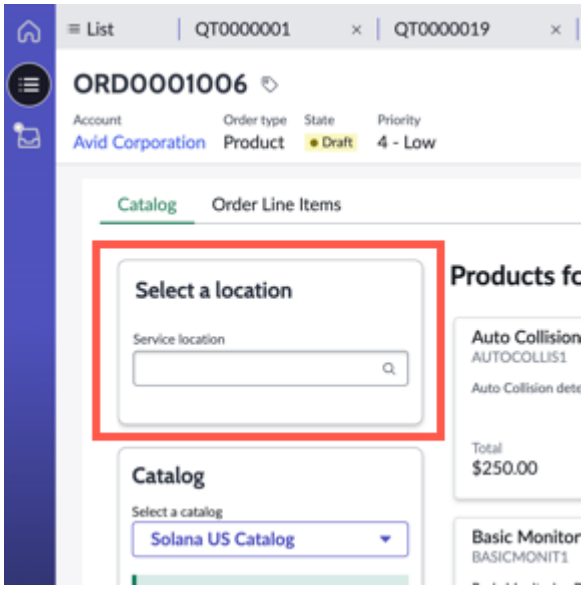
Before you begin

Role required: sn_ind_tmt_orm.order_agent

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. Select **Customer Orders** > **All**, then choose the order you want to work with.
   The order opens in the **Catalog** tab with the **Select a location** field available.
3. Select a location.

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The products in the catalog are filtered according to the selected location.

Update product locations at the order line level

Agents can use the copy function to update product locations at the order line level Order Management.

Before you begin

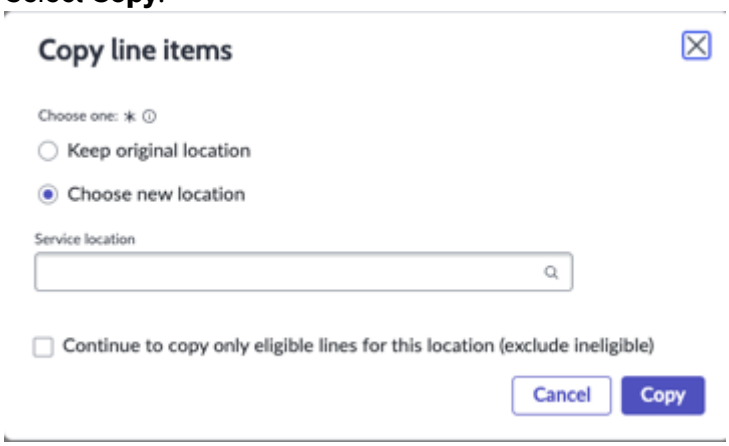
Role required: sn_ind_tmt_orm.order_agent

About this task

Agents can change the location of products at the order line level by using the copy function. When an order line item is copied, a dialog box opens allowing the agent to select a location. Agents can select one line item to update or multiple line items.

Procedure

1. In the CSM Configurable Workspace, select the **List** view.
2. From the **Customer Orders** > **All**, select the order you want to work with and select the **Line Items** tab.
3. Select one or more order line items that you want to change to another location.
4. Select **Copy**.



5. In the **Copy line items** window, choose any one of the options.

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Note:
Be sure to select **Continue to copy only eligible lines for this location (exclude ineligible)** within the **Copy line items** window.

This selection copies the eligible line items to your new location and skips the line items that aren't eligible. If the option isn't selected, no quote line items are copied.

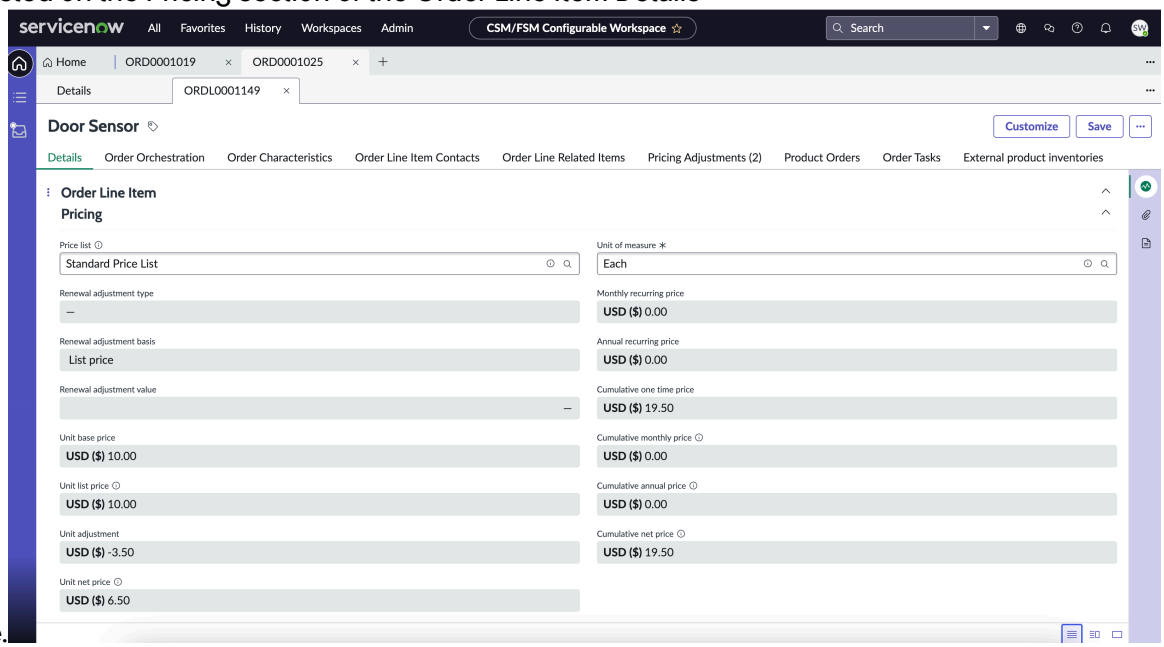
6. Select **Copy**.
   The order lines are copied and added to the order line items list with a new location.

Price adjustment breakdown on order lines

Order agents can view the price adjustments that were applied to the base price in the price list to reflect attribute adjustments and any custom adjustments that you added through the pricing plan, and see how the net price was calculated while processing orders.

Where to find the price adjustment details

The unit base price, unit list price, and unit adjustment details are listed on the Pricing section of the Order Line Item Details page.



The Price Adjustments tab on the order line item provides the following information.

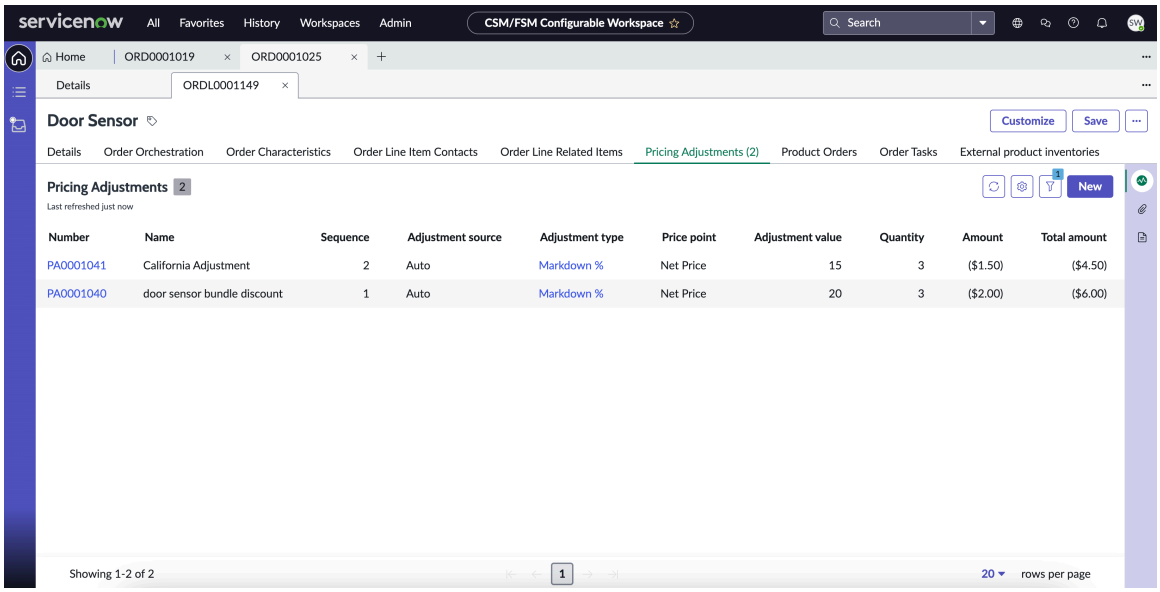
Price Adjustments tab for order lines

Field	Description
Number	ID of the price adjustment record.
Name	Name specified while creating the price adjustment.
Sequence	The number of the pricing plan step used to generate the adjustment. It helps the agent identify the order of operations for the pricing adjustments.
Adjustment source	Origin of the price adjustment.

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Price Adjustments tab for order lines (continued)

Field	Description
	• Auto: Adjustment applied automatically by pricing plan, and can be defined using standard adjustment matrices or via extension points, such as, PricingAdjustmentExtensionPoint. • Manual: Manual adjustment made by agent.
Adjustment type	• Markdown % • Markdown amount • Markup % • Markup amount • Price override
Price point	Setup by the admin in the Pricing Plan for the adjustment step. This could be the List Price or Net Price.
Adjustment value	Percentage or absolute amount of adjustment that is applied to the price.
Quantity	Quantity of items in the order line.
Amount	Price adjustment amount.
Total amount	Quantity multiplied by the amount.
Unit running price	Price calculated with the adjustment amount from the specific pricing plan step.



Price adjustment example

To understand price adjustment and the terms used, let's consider a scenario where a customer is purchasing an API Edition license from a provider.

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- Unit Base Price: The price defined in the Price List, say $1000.
- Attribute Adjustment: The customer opts for the "Professional Plus Edition" version of the product with Price Point as List Price which costs them additional $200.
- Volume adjustment: The customer receives a discount of $50 when they purchase 100 licenses. Here as well, the Price Point is the List Price.
- Price Point: The Price point is the entity on which the price adjustments were applied. It could be the List Price or Net Price.
- Unit List Price: The Unit List Price is calculated as $1000 + $200 - $50 = $1150.
- Customer also receives a premier account discount of $100 with Price Point as Net Price.
- Unit Net Price: The Unit Net Price is the final price after all adjustments have been applied. This is calculated as $1150 - $100 = $1050.

Related topics

Configurable pricing plans

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

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.

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.

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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.
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.

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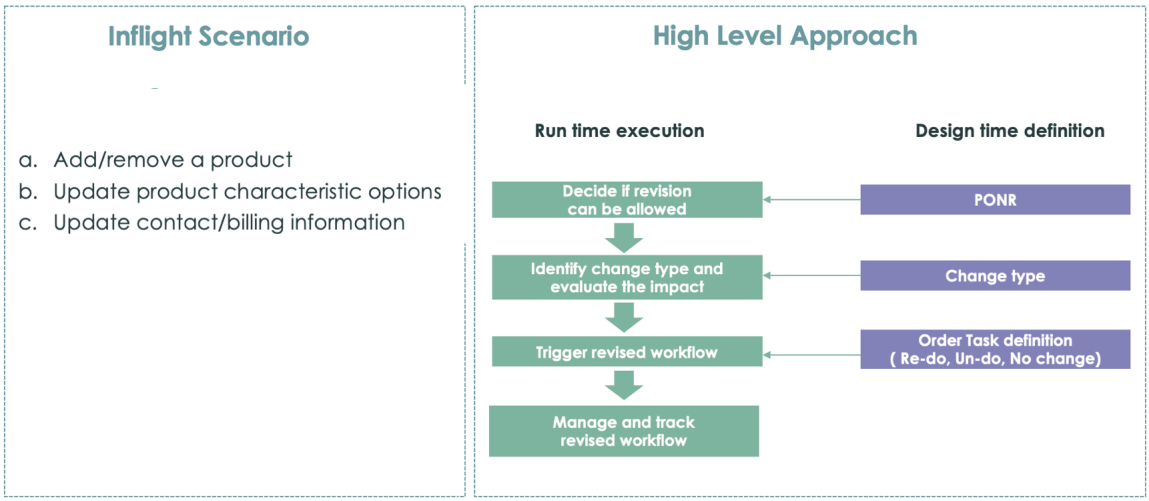
Fulfillment-driven order changes (continued)

Type of change	Example
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. To learn more, see and .	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.

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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:

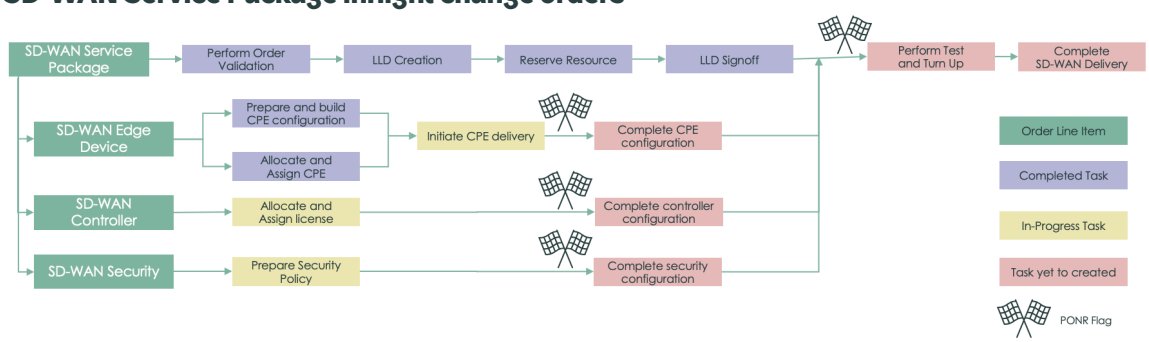
- and
-

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



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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.

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 Workflow Studio, 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

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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.	Contact
Changes any price field.	Price
Changes made to the order line item quantity for a product or service order. To learn more, see Order quantity support in Order Management.	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.

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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. **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

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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.

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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.

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.

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.

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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.

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.

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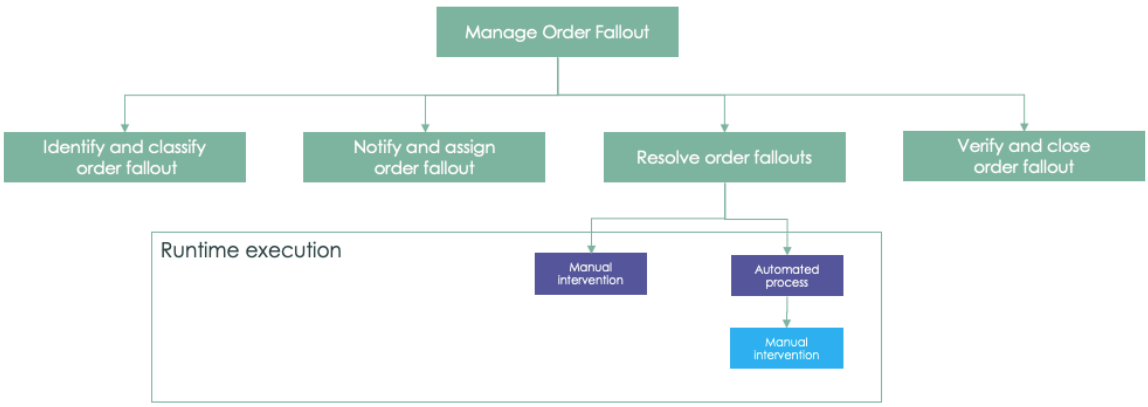
Fallout errors and exceptions (continued)

Type of failure	Description
Failure to complete system interaction in a timely manner	Timeouts that occur during system interactions.
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 Workflow Studio to process order fulfillment exceptions in an automated manner. To learn more, see Create automated and manual fallout records.

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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 Workflow Studio.

- 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 requeue the task to be sent to the downstream system for processing, up to a pre-defined 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:

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- 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:

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- 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 FOnnnn has been created` also appears.

Related topics

Fallout Management data model

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.

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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 .

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 .
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

Learn how your order entry and fulfillment agents, managers, and fulfillers can use the 360 View in the Order Management 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:
To learn how to create new customer accounts, see Configure accounts and contacts in Customer Service Management (CSM).

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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**.

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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. To learn more, see these two topics: ○ ○ .

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.

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Field	Description
Contact	Name of the customer contact that is associated with the customer service case. 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. *(empty)* denotes that the product inventory item hasn't yet been installed at the customer site.
State	State of the product inventory item. *Installation Pending* 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:

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Field	Description
	○ 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**.
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. In the CSM Configurable Workspace, select the **List**  view.
2. Navigate to **Customer Orders** > **All**.
3. Select the order that you want to view.
4. 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.
5. To change the information or elements displayed in the timeline view, use these options.

Monitoring Jeopardy Management

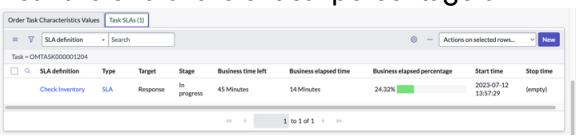
Order managers and agents can monitor jeopardy-enabled fulfillment tasks. When a task enters jeopardy, managers can take action to ensure the fulfillment workflow isn't delayed.

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.

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Jeopardy status alerts

Jeopardy status	Description
In Jeopardy enabled order forms, look for the **Jeopardy Level** column	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.
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: tTask is near the end of the critical percentage of allotted time. 

Using Lead-to-Cash Process Management

Sales process managers can use Lead-to-Cash Process Management to create sales process records and monitor and track sales processes through a consolidated dashboard.

Overview of creating and monitoring sales processes

Access the Lead-to-Cash Process Management application from the CSM Configurable Workspace to create sales process records and monitor the sales process using the sales process dashboard.

- Create a sales process record

  Create a sales process record to monitor and track sales activities for a customer account.

- Navigating the sales process dashboard

  Become familiar with the sales process dashboard so you can navigate and use the dashboard to monitor the sales process.

- Monitoring and tracking sales activities

  Monitor and track sales activities for a customer account after you have created a sales process record.

- Create and manage task checklists

  Create checklists to ensure thoroughness, consistency, and prevent errors while completing routine tasks and processes such as fulfilling orders.

- Add attachments for a sales process record

  Attach files, documents, images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

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- View and send emails in Lead-to-Cash Process Management

  View consolidated emails for all hard-linked entities monitored within a sales process record and compose emails from the sales process dashboard.

- Linking, delinking, and link conversion conditions

  Become aware of the conditions for linking, delinking, and hard or soft-linking records on the node map.

- Create business process tasks

  Create business process tasks to track miscellaneous tasks at the sales process record-level.

Create a sales process record

Monitor and track sales activities for a customer account by creating a sales process record in Lead-to-Cash Process Management.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. Navigate to **Lead to Cash Process Management** > **Sales Process Records**.
4. Select **New**.
5. On the form, fill in the fields.

Create new sales process record form

Field	Description
Short description	A brief summary of the business process record used for quick identification in lists and notifications.
Business process	A business process that you want to monitor such as order-to-cash.
Account	Customer account for which you want to monitor the sales activities.
Assigned to	(Optional) Person responsible for managing and monitoring the sales process record.
Business entity	The top-level sales entity that you want to monitor, for example, opportunity. Quotes and orders related to that entity are automatically included in the node map.

When you select a business entity, all similar entities related to the selected account are displayed.

6. Select the records you want to monitor directly under the sales process record.
7. Select **Save and Open**.
   A dashboard containing a hierarchical node map and details section related to the selected records is displayed.

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What to do next

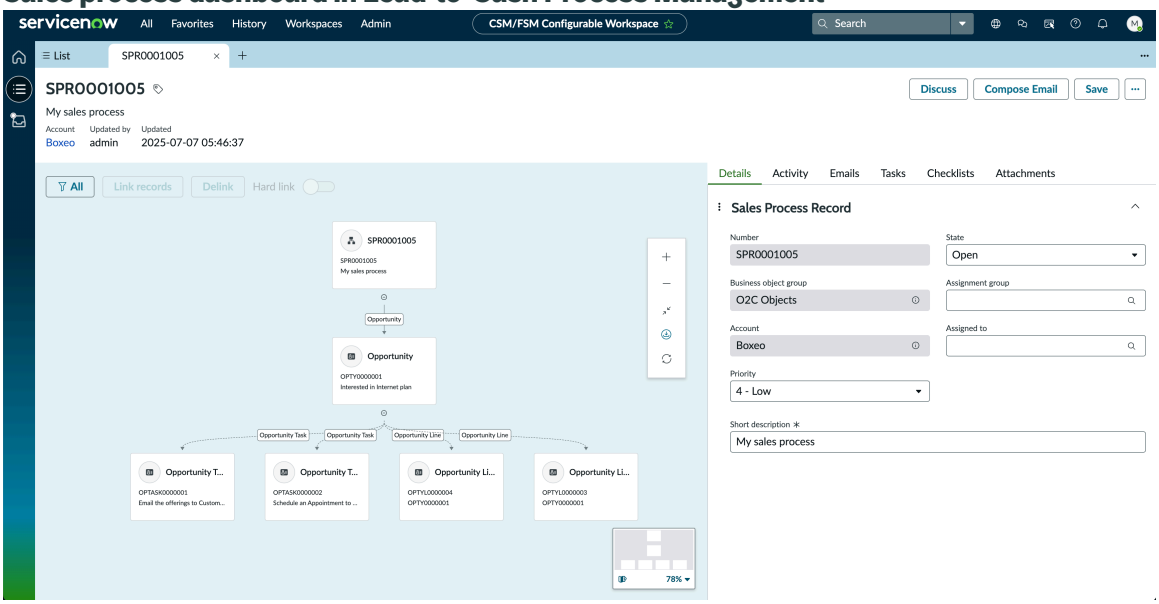
Track and manage sales process using the sales process dashboard. For more information, see Navigating the sales process dashboard and Monitoring and tracking sales activities.

Navigating the sales process dashboard

Become familiar with the various elements that make up the sales process dashboard in the Lead-to-Cash Process Management application.

The sales process dashboard in the Lead-to-Cash Process Management application offers a consolidated view of sales activities across entities such as opportunities, quotes, and orders.

Sales process dashboard in Lead-to-Cash Process Management



Node map elements

The hierarchical node map visually represents the relationships of sales entities. Sales process managers and contract admins can dynamically manage this map by linking or delinking records, converting soft links to hard links for active monitoring. The following table describes the function of node map elements.

Node map elements

Element	Function
Filter icon	Filter link by types to view associated nodes. You can filter to view all nodes or hard-linked nodes.
Link records	Link more sales records to the selected node. To add more records, select **Link records**, then select a **Business entity** on the Link records pop-up window. Select specific records that you want to link and select **Link selected**.
Delink	Delete child record and its hierarchy. To delink a record, select a link connecting a parent node and its child nodes you no longer want to monitor, and select **Delink**.
Hard link	Enables you to convert soft links to hard links and vice versa. To convert a link, select it and select the **Hard link** toggle switch.

By default, only three levels are displayed on the node map when you open a sales process record in the CSM Configurable Workspace. Admins can increase or decrease the number of

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levels displayed. For more information, see Customize hierarchical node map levels for Lead-to-Cash Process Management.

Only 250 nodes can be displayed on the node map at a time. If you have more than 250 nodes, collapse some nodes and then expand and view the other nodes.

Details pane

A details section consolidates all relevant operational elements—tasks, emails, checklists, and attachments—into a single pane.

Note:

Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard.

Related topics

- Monitoring and tracking sales activities
- Create and manage task checklists
- Add attachments for a sales process record
- Manage attachments for a sales process record
- View and send emails in Lead-to-Cash Process Management
- Linking, delinking, and link conversion conditions
- Using Sidebar

Monitoring and tracking sales activities

Monitor and track sales activities for a customer account after you have created a sales process record.

The **Details**, **Activity**, and **Tasks** tabs provide the following information when you select a node on the Lead-to-Cash Process Management sales process node map:

Sales entity details for an account

Access key information about a sales process record such as the record number, state, the agent assigned to the record, account, and priority, and additional details for related sales entities such as the product offering, quote date, pricing information, and so on to expedite decision making and issue resolution.

Activities

View a running history of updates such as field changes or the availability of new file attachments, enabling you to stay informed about the sales process record without having to switch contexts. Activities can only be viewed for a sales process record.

Filter, search, and sort activities using the Filter , Search and Sort icons respectively.

Task assignment and status

View a consolidated list of tasks that provides information about hard-linked entity records that are monitored using the sales process record, including business process tasks. The information includes the task's status, description and the agent assigned to it. You can also search and filter tasks using the task ID, short description, or state through the search box and Filter icon .

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Related lists configured in the Sales cockpit view in Next Experience UI govern the tabs that are displayed for a sales entity on the sales dashboard. For example, you can display tabs such as **Line Items for an Opportunity** and **Line Characteristics for Opportunity Line** containing the respective record details.

By accessing the sales data and using integrated communication channels such as sidebar discussions and emails, you can promote record completeness and accuracy, and support downstream processes such as order fulfillment, revenue recognition, and reporting.

Related topics

- Create and manage task checklists
- Add attachments for a sales process record
- View and send emails in Lead-to-Cash Process Management
- Linking, delinking, and link conversion conditions
- Using Sidebar

Create and manage task checklists

Create and manage checklists to track progress on completing routine or repetitive tasks and processes such as fulfilling orders.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Checklists** tab.
6. Select **Add item**.
7. Enter a task in the **Checkbox** field.
8. Repeat the steps to add more tasks to your checklist.

   To remove a task while creating the checklist, select the Delete icon next to the task entry.
9. Select **Save**.

   You can add more tasks to your checklist by selecting **Edit**.
10. **Optional:** Modify a saved checklist by adding or deleting items.

    a. In the sales process record on the dashboard, select **Checklists**.

    b. Select **Edit**.

    c. Add or delete an item.

    - To delete an item, select the Delete icon next to the task entry.
    - To add an item, select **Add item** and provide the task name.

    d. Select **Save**.

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Add attachments for a sales process record

Attach files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

About this task

You can attach files only to a sales process record. To add attachments to child records, you must navigate to the respective entity's record page.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Attachments** tab.
6. Upload files.

> **Note:**
> The default maximum file size is 1 GB, but this may vary based on the size limit set by your admin on your ServiceNow instance.

7. Select **Upload**.
8. **Optional:** Attach more files by selecting the Add icon .

What to do next

Download, rename, or delete attachments. For more information, see Manage attachments for a sales process record.

Manage attachments for a sales process record

Rename, download, or delete files, documents, or images such as implementation plans, customer-provided specifications, or finalized quotes related to a customer account you're monitoring with a sales process record.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Under **Lead to Cash Process Management**, select **Sales Process Records**.
4. Select the sales process record.
5. Select the **Attachments** tab.
6. Select the attachment.

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7. Select the More actions icon ⋮ for the attachment entry.
8. Select the desired action.
   - Download
   - Delete
   - Rename

   Tip:
   For bulk deletions or downloads, select the files or select **All Files** and then select the action.

9. **Optional:** Select an attachment to preview it.

View and send emails in Lead-to-Cash Process Management

View consolidated emails for all hard-linked entities monitored within a sales process record and compose emails from the sales process dashboard.

Before you begin

You can compose and send emails related to a sales process record by default. To compose emails for child entities such as an opportunity or quote, you must be granted access to those entities. For more information, see Setting conditions for enabling email access in Lead-to-Cash Process Management.

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Lead to Cash Process Management** > **Sales Process Records**.
4. Select the sales process record.
5. View emails from all hard-linked entities tied to the sales process record by selecting the **Emails** tab.
6. Compose and send the email.
   a. Select **Compose Email**.
   b. Enter the list of recipients.
   c. Draft your email.
   d. Select **Send email**.

Linking, delinking, and link conversion conditions

Several conditions can enable or disable you from linking, delinking, and hard or soft-linking records in Lead-to-Cash Process Management.

Difference between hard and soft-linked nodes

Links can be toggled between hard and soft types based on whether they need to be actively monitored.

Hard-linked nodes

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A hard link is an active monitoring connection established by the sales process manager. When a record is hard linked, it's actively tracked, and its emails and tasks are consolidated and visible in the sales process record. Hard links are represented by solid lines in the node map.

Soft-linked nodes

A soft link is a passive connection based on database relationships. Records that are soft linked aren't actively monitored by the sales process manager, and their emails and tasks aren't consolidated in the sales process record. Soft links are represented by dotted lines in the node map.

Conditions for linking and delinking records

Linking records: You can link records to all hard-linked nodes, including those records that are converted from soft links to hard links.

Delinking records: You can delink only hard-linked records and they must meet either of the following conditions:

- The target node was added using the Link Records flow
- The target node is a top-level entity

Conditions for converting link types

Hard links cannot be converted to soft links if they meet the following conditions:

- The target node was added using the Link Record flow.
- The target node has immediate hard-linked child nodes but only one hard-linked source node.

Soft links can be converted to hard links only if the source node has at least one hard-linked record.

Create business process tasks

Track tasks for sales process records in Lead-to-Cash Process Management such as the closure of all linked opportunities or generating orders.

Before you begin

Role required: sales process manager [sn_l2c_cockpit.sales_process_manager]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon .
3. Navigate to **Lead to Cash Process Management** > **Business Process Tasks**.
4. Select **New**.
5. On the form, fill in the fields.

Business Process Task form

Field	Description
Number	Unique ID of the business process task record.
Business process record	The sales process record.

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Field	Description
Parent	(Optional) Parent record of the selected object. In this case, another business process task.
Priority	The order in which the task should be addressed. The available options are: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low ○ 5 - Planning
State	State of the task record. The available options are: ○ Open ○ Work in Progress ○ Closed Complete ○ Closed Incomplete ○ Closed Skipped
Assignment group	User group to assign to the task.
Assigned to	The sales process manager to assign to the task.
Short description	(Optional) A brief description summarizing the task.
Work notes	(Optional) Records activities by internal users.

6. Select **Save**.

What to do next

Monitor the business process task from the sales process dashboard. For more information, see Monitoring and tracking sales activities.

Using Customer Engagement Sequences

Sales representatives view and work on sequence tasks assigned to them using the Customer Engagement Sequences application.

Overview of using Customer Engagement Sequences

Access the Customer Engagement Sequences app from the CSM Configurable Workspace to view your sequence tasks and complete predefined activities listed within it.

View sequence tasks

View sequence tasks assigned to you from the CSM Configurable Workspace.

Before you begin

Role required: sequence viewer [sn_crm_sequence.viewer]

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Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. View your in-progress sequence tasks by selecting **My Active Sequence Tasks**.
   The following table describes the details displayed on the list view.

My Sequence Task list view

Column	Description
Number	ID of the sequence task record.
Sequence entity record	Sales entity record that triggered the sequence. For example, lead.
Sequence	Sequence that created the sequence task record.
Description	Description of the sequence.
State	Current state of the sequence task. The available options are: ○ Work in progress ○ Completed
Priority	Priority of the sequence task.
Due date	Date by which the sequence task must be completed.
Added at	Timestamp when the sequence task was created.

5. View the sequence steps for a record by selecting it.

What to do next

Engage with your prospective customers by following the activities in the sequence steps. For more information, see Complete predefined customer engagement tasks.

Complete predefined customer engagement tasks

Execute predefined sequence steps in your sequence tasks in the CSM Configurable Workspace to engage with your prospective customers.

Before you begin

Role required: sequence viewer [sn_crm_sequence.viewer]

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ☰.
3. Navigate to **Sequences** > **My Sequence Tasks**.
4. Select a sequence task record.
5. When the record opens, select the **Sequence Steps** tab.
   The navigation pane lists the activities or steps you need to complete. The activity details and actions are displayed in the work area.
6. After completing an activity, select an appropriate option to move to the next activity.
   The sequence is marked as Completed when you finish all activities within the sequence task.

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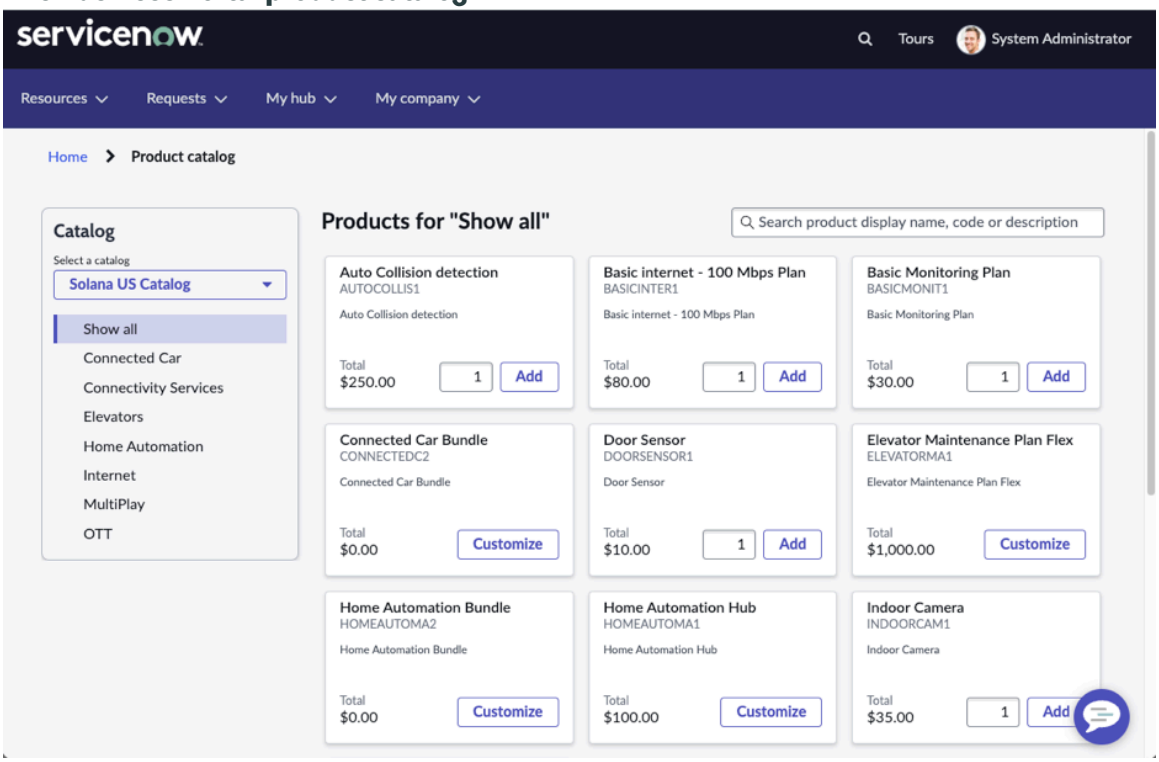
Customer self-service using the Business Portal

Customers can use the Business Portal to browse product catalogs, create product orders, create and view order cases in Order Management.

Creating orders using the Business Portal

The Business Portal uses the product catalog to let customers browse and configure products. Customers can also build orders and submit them for fulfillment.

The Business Portal product catalog

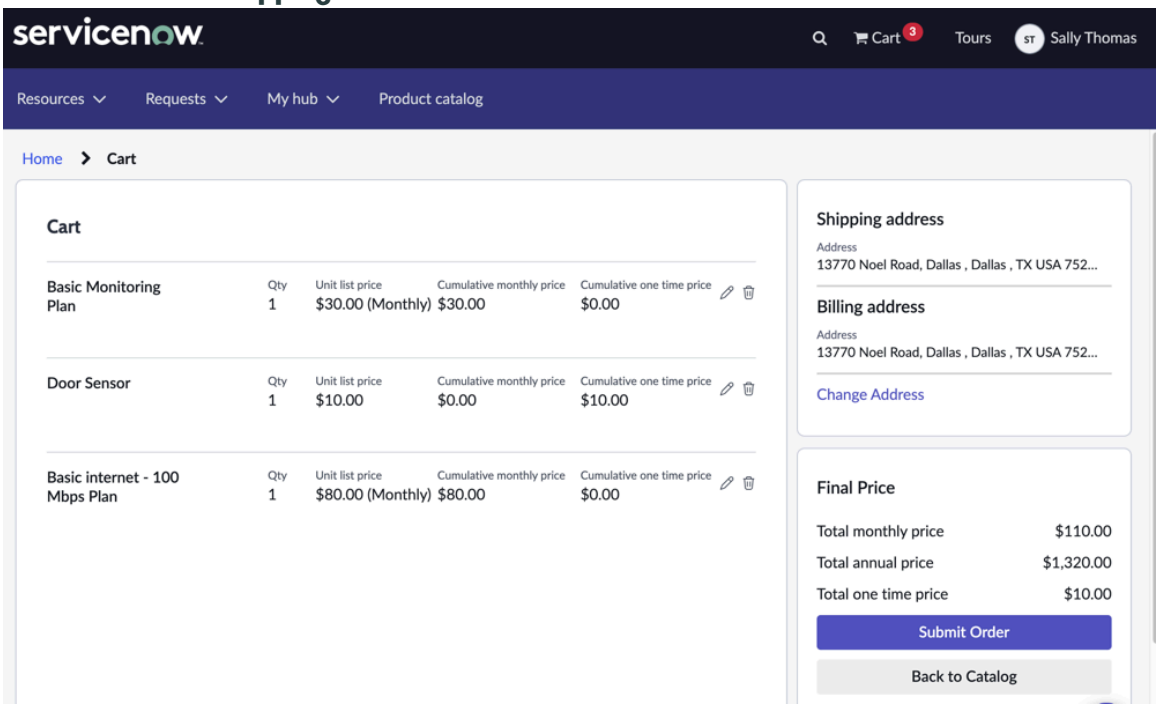


Viewing products in the shopping cart in the Business Portal

Customers can view products in their shopping cart using the Business Portal. Customers are also submit orders to start the fulfillment process.

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Business Portal shopping cart



Creating and viewing order cases

Customers can create and view order cases for orders or order line items using the Business Portal.

Access the Business Portal

Customers can access the Business Portal from their instance to browse products and create orders.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Go to your instance and select the URL.
2. Edit the instance URL and append **/business_portal** to the end after the com.
   The Business Portals opens.

Create orders with the Business Portal

Customers can use the Business Portal to browse products and create orders in Order Management.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Navigate to your Business portal.
   See for more information about navigating to the Business Portal.
2. Select **Product Catalog**.
3. Use the catalog to browse and configure products.

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4. Select **Add** to add products to the cart.
5. Select **Customize** to open the product configurator to select product options and then add the product to the shopping cart.
6. Select the shopping cart to view the products in your cart.
7. In the shopping cart, select **View cart** to open detailed information about the products in the cart.
8. Select **Submit Order** to create an order or **Return to Catalog** to return to the catalog view. When the order is submitted, **Order Details** opens and shows the order number and order details.

Related topics

View an order with the Business Portal

View an order with the Business Portal

View orders using the Business Portal in Order Management.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Navigate to your Business Portal.
2. In the Business Portal, select **Requests** > **View submitted request** > **View orders**. The View order window has the following controls.
   - To search for orders - use the search option.
   - To sort, and filter orders - use the filter.
   - To export as a PDF, Excel, or CSV - use the Action icon .
   - To open and order - select the order number.
   - To navigate back to the main window - use the breadcrumbs.

Related topics

Create orders with the Business Portal

Request updates for one or more orders

Request changes to the expected order fulfillment date and shipping location for one or more orders or to draw attention to an issue by creating an order case from the Business Portal.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Log in to the Business Portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an order case**.
3. Create a new order case.

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a. On the form, fill in the fields.

Create New Order Case form

Field	Description
Account	The account for which you're creating the case.
Contact	The name of the customer contact for this case.
Scope of request	This option should be set to **Order header details, multiple orders** to create a case for one or more orders.
Priority	The available assigned priorities are: ▪ 1 - Critical ▪ 2 - High ▪ 3 - Moderate ▪ 4 - Low (default)
Short description	Optional brief description.

b. Select **Next**.
An order case is created with its State as Draft.

4. Select the orders that you want to add to the order case.

a. On the Add and specify changes form on the order case page, select **Add**.

b. On the Add orders to case window, select one or more orders and select **Add**.
Order case lines are created corresponding to the order records.

c. Select the order case lines you want to edit and select **Edit**.

Select a single order case line to make specific changes to a specific order. Select multiple order case lines to make the same changes for all orders.

Note:

If you no longer want to make changes to an order case line item, select it, select the drop-down button next to **Edit**, and select **Delete** to remove it from the list of items to be modified.

d. Modify any or all of the values in the Edit item dialog box.

Field	Description
Requested expected date	The date you want your order to be fulfilled.
Requested shipping location	The location to which you want your order to be shipped.

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e. Select **Update**.

f. Select **Next** on the Add and specify changes form.

5. Verify the requested changes and submit the order case on the Review and submit page.
   - If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
   - If the changes are accurate, select **Submit**.

Result
The order case is created with the order case lines corresponding to the orders you updated, and the state of the order case changes to New.

Request updates for items within a single order

Request changes for the expected order fulfillment date, shipping location, or quantity for specific items within an order by creating an order case from the Business Portal.

Before you begin
Role required: sn_customerservice.customer

Procedure
1. Log in to the Business Portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an order case**.
3. Create a new order case.

a. On the form, fill in the fields.

Create New Order Case form

Field	Description
Account	The account for which you're creating the case.
Contact	The name of the customer contact for this case.
Scope of request	This option should be set to **Specific order lines, single order** to create a case for specific order line items within a single order.
Order number	The order for which you want to create the case.
Priority	The available assigned priorities are: ▪ 1 - Critical ▪ 2 - High ▪ 3 - Moderate ▪ 4 - Low (default)
Short description	Optional brief description.

b. Select **Next**.
An order case is created with its State as Draft.

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4. Select specific order items that you want to add to the order case.

   a. Select **Add** on the Add and specify changes form on the order case page.

   b. On the Add orders line items to case window, select the order items for which you want to create a case and select **Add**.
   Order case lines are created corresponding to the order items you selected.

   c. Select the order case lines you want to edit and select **Edit**.

   If you no longer want to make changes to an order case line item, select it, select the drop-down button next to **Edit** and select **Delete** to remove it from the list of items to be modified.

   d. Modify one or more of the values on the Edit item dialog box.

Field	Description
Requested expected date	The date you want your order to be fulfilled.
Requested shipping location	The location to which you want your order to be shipped.
Requested quantity	The quantity of the item you want to purchase.

   e. Select **Update**.

   f. Select **Next** on the Add and specify changes form.

5. Verify the requested changes and submit the order case on the Review and submit page.
   - If you need to make more changes, navigate to the required page from the Activities section and repeat the modification process.
   - If the changes are accurate, select **Submit**.

Result
The order case is created with the order case line items corresponding to the order line items you updated, and the state of the order case changes to New.

View order case details

View the list of order cases and their state from the Business Portal.

Before you begin
Role required: sn_customerservice.customer

Procedure
1. Log in to the Business Portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks**.
3. Select **My Order Cases** from the Categories menu to view order cases.
4. Select a case to view its state and other details.

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Order case states

State	Description
New	A new order case that is submitted.
Draft	The order case that has not yet been submitted. Order case lines in the Draft state can still be modified.
Work in Progress	The order case is being handled by the sales agent.

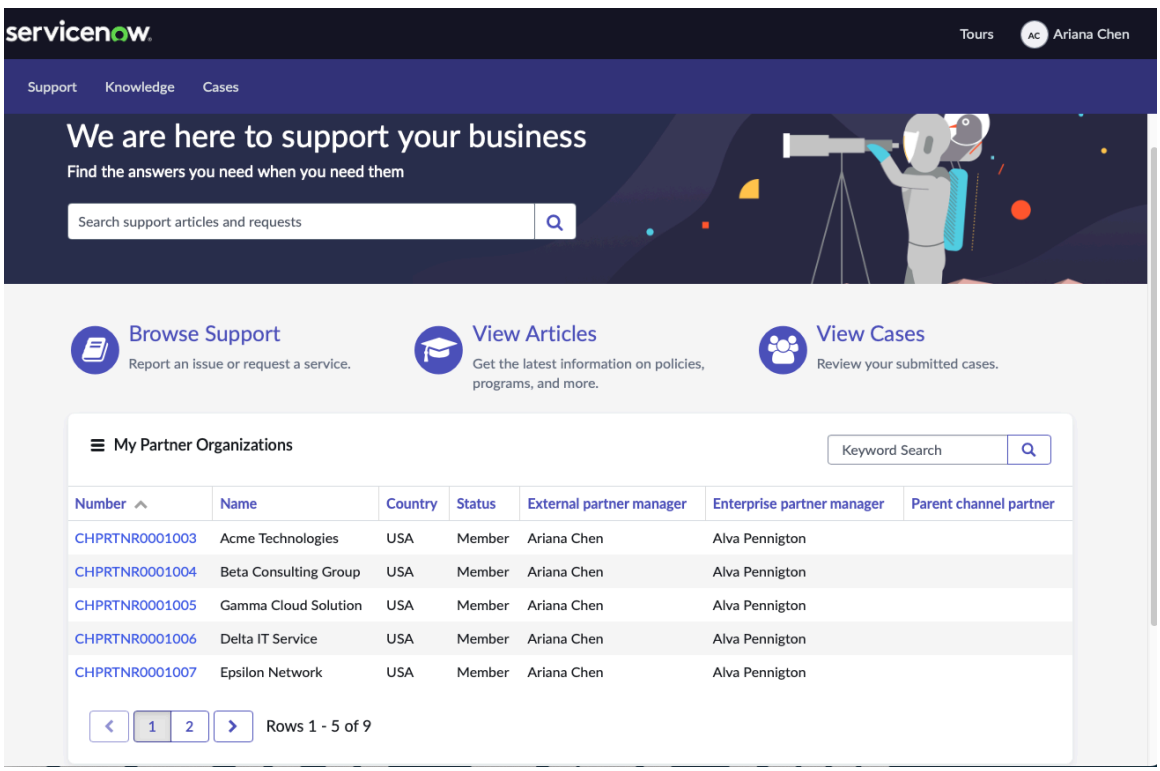
Using Partner Relationship Management

Install the Partner Relationship Management plugin (com.snc.partner_relationship_management) to enable admins and channel partners to use the self-service Partner portal.

As an Enterprise Partner Relationship manager or a channel partner you can use the Partner Portal to do any of the following tasks.

- Get a 360° view of the Partner portal.
- Add and manage staff members.
- Submit an inquiry to connect with the enterprise.
- Access knowledge base articles and engage with the community.

Partner Portal



From the Partner Portal, you can use and access the following features.

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Partner portal home page for logged-in users

Task	Description
Support	Channel partners can perform the following actions through the **Support** feature. • View and track cases. • Raise an inquiry and connect with the enterprise. • Register external staff members into a partner organization. • Move internal staff members within different partner organizations. To learn more about registering a case, see Raise an inquiry on Partner Portal. To learn more about registering staff members, see Register a member on Partner portal.
Knowledge	Select **Knowledge** on the header to view the kb_home page. You can search the knowledge base or view a list of top-rated or most viewed knowledge base articles.
Cases	Provides access to all cases and quick links to open cases that require action.
Tours	View a tour for additional guidance on how the Partner Portal works. Your administrator determines whether tours appear on pages.
Profile menu	Select your profile picture to view your profile or log out of the Partner portal.
Search	Search for support articles and other requests. Enter a search word or term and select **Search** to view the results.
Browse Support	Report an issue or request a service.
View Articles	Explore the knowledge base to access information that you require.
My Partner Organizations	View a list of all the partner organizations associated with the channel partner. You can export the partner details into PDF, Excel, or CSV formats. To learn more about partner organizations, see Channel partner table fields.

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Partner portal home page for logged-in users (continued)

Task	Description
Featured Articles	View featured community content.
Most Viewed Articles	View a list of the most viewed articles on the community.

Related topics

Raise an inquiry on Partner Portal

Register a member on Partner portal

Raise an inquiry on Partner Portal

Raise a query or concern with the enterprise on the Partner Portal.

Before you begin

Role required: sn_prm.enterprise_partner_rel_manager, sn_prm.external_partner_manager or sn_prm.external_partner_ associate

Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **Support**.
3. From the **Categories** list view, select **Support**.
4. Select **General Inquiry**.
5. On the form, fill in the fields.
   To learn more about the fields on the inquiry form and their descriptions, see General Inquiry form.
6. Select **Submit**.

Related topics

Using Partner Relationship Management

Register a member on Partner portal

Register a member on Partner portal

Register a new partner member or transfer existing staff within a partner organization.

Before you begin

Role required: sn_prm.enterprise_partner_rel_manager, sn_prm.external_partner_manager, sn_prm.enterprise_partner_admin

About this task

Assign each member of staff certain responsibilities and accesses to perform daily operations and tasks.

Procedure

1. Navigate to the Partner portal.
2. From the portal header, select **Support**.
3. From the **Categories** list view, select **Service**.

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4. Select **Register Member**.
5. On the form, fill in the fields.
   To learn more about the fields on the member registration form and their descriptions, see Member registration form.
6. Select **Submit**.

Related topics

Using Partner Relationship Management

Raise an inquiry on Partner Portal

Extending Order Management with ServiceNow applications and integrations

You can use various ServiceNow store applications and integrations to further extend the capabilities of Order Management.

Applications and integrations for extending Order Management

Application or integration	Description
Order Management for providers with Service Exchange	Enable service providers and their customers to use Order Management to place and fulfill complex orders, including certain types of MACD orders, over Service Exchange.
Order Management integration with Field Service Management	Create field service work order requests automatically with Order Management, and track them in Field Service Management.
Order 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 for providers with Service Exchange

The Service Exchange Order Management for Providers application enables service providers to use Order Management to create product offerings and service specifications that Service Exchange consumers can order from service catalogs in their ServiceNow instances. Order agents and fulfillers can then complete the orders and requests on the provider instance.

Overview of Service Exchange Order Management for Providers

The Service Exchange Order Management for Providers application supports the sales order and fulfillment process over Service Exchange. Published product offers and service specifications generate remote record producers (RRPs). These remote record producers create the remote catalog items that your consumers can order from the Service Portal on their instance.

The workflow for generating these remote record producers involves these basic steps:

- Product catalog admin or manager creates the product offerings and service specifications on a provider instance, specifying the distribution channel as Service Exchange and indicating that product offers are sellable items. When the offerings and service specifications are

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published, remote record producers (RRPs) are generated automatically to create the remote catalog items.

- Service Exchange admin associates consumer criteria to the remote record producers.
- Service Exchange admin reviews and activates the remote record producers on the provider instance. These remote record producers publish the remote catalog items to the service catalog on a consumer instance.
- Consumers request services using the remote catalog items on the service portal in their consumer instance. The requests automatically create a provider task for fulfilling the requests on the provider instance.
- On the provider instance, the order and order lines are created for order managers to approve and agents to fulfill.
- On the consumer instance, consumers receive updates on the order state and worknote comments from order agents.

Features

- Support simple and bundled product offerings with composite specifications.
- Support service specifications.
- Support quantity orders for order line items and selection of optional products and services.
- Synchronize product and service inventory records, which can be viewed by consumers in their instance.
- Allow consumers to:
  - Suspend, resume, and disconnect orders
  - Cancel an order from the consumer instance if the order hasn't reached the point of no return (PONR).

Benefits

- Automates the generation of remote record producers that publish offerings and service specifications to a remote catalog.
- Enables faster order fulfillment on the provider instance and improves order accuracy.
- Facilitates communication by updating comments between the provider and customer instance as well as sharing frequent order status updates.

Order state mapping

During order processing, note that order status states correspond to certain provider task states.

Order and provider task states

Order state	Provider task state
Draft	Received
Submitted	Received
Enrichment in progress	Received
Enrichment on hold	Received
New	Received

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Order and provider task states (continued)

Order state	Provider task state
Acknowledged	Work in Progress
Scheduled	Work in Progress
Rejected	Awaiting info
In progress	Work in progress
Revision in progress	Received
Awaiting information	Awaiting info
On hold	Awaiting info
Assessing cancellation	Cancelled
Cancellation in progress	Work in Progress
Cancelled	Cancelled
Completed	Closed

Next step

As a Service Exchange admin, review the setup tasks in Configuring Service Exchange Order Management for Providers.

Configuring Service Exchange Order Management for Providers

Configure the Service Exchange Order Management for Providers application, which enables providers to use Order Management to create and fulfill product orders over Service Exchange. Providers publish the product offerings and service specifications as remote catalog items so that consumers can order from the Service Catalog on their own instance.

Configuration overview

Follow these tasks to set up the Service Exchange Order Management for Providers application, which uses Order Management to create product offerings and service specification and publish them ServiceNow in your provider instance as remote record producers. Service Exchange admins can then activate these remote record producers to make the products and services available from the Service Catalog on consumer instances.

Setting up the Service Exchange Order Management for Providers application

Configuration step	Description	Role
Install Service Exchange for Providers	Install the Service Exchange for Providers application from the ServiceNow Store. For more information on configuring this application, see Installing and configuring Service Exchange for Providers.	Admin
Install Service Exchange for Consumers	Install the Service Exchange for Consumers application	Admin

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Setting up the Service Exchange Order Management for Providers application (continued)

Configuration step	Description	Role
	from theServiceNow Store. For details on configuring this application, seeInstall Service Exchange for Consumers .	
Install Service Exchange Order Management for Providers	Install the Service Exchange Order Management for Providers application from the ServiceNow Store.	Admin
Create a product offering for a remote catalog item	In the provider instance, create the product offerings to be added as remote catalog item to the service catalog for your consumers.	Product catalog admin or manager
Create a service specification for a remote catalog item	In the provider instance, create the service specification for a service to be added as a remote catalog item to the service catalog for your consumers.	Product catalog admin or manager
Associate consumer criteria to a remote record producer	In the provider instance, review the remote record producer and associate the customer criteria that entitles the catalog item for eligible Service Exchange consumers.	Service Exchange provider admin
Associate consumer criteria to the remote record producer for manage inventory.	Review the remote record producer for manage inventory and associate the customer criteria.	
Activate the remote record producer	In the consumer instance, activate entitlements for the remote record producers.	Service Exchange consumer admin
Retire a remote catalog item	Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer and removes the item from the service catalog on the consumer instance.	Product catalog admin or manager

Install Service Exchange Order Management for Providers

You can install the Service Exchange Order Management for Providers application (sn_sb_pro) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they're not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Service Exchange Order Management for Providers application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Service Exchange Order Management for Providers:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Find components installed with an application..

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Exchange Order Management for Providers application ((sn_sb_pro)) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Create a product offering for a remote catalog item

Create a product offering in a Service Exchange provider instance. When you publish the product offering, a remote record producer is created for the remote catalog item.

Before you begin

Role required: sn_prd_pm.product_catalog_admin and sn_prd_pm.product_catalog_manager

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About this task

When you're creating the product offering, use the **Distribution channel** field to set the channel to Service Exchange.

Procedure

1. In the CSM Configurable Workspace on the provider instance, select the **List** view.
2. Navigate to **Offerings** > **Product Offerings**.
3. Select **New**.
   On the Details tab, fill in the fields.

Create New Product Offering form

Field	Description
Number	System-assigned number for the product offering.
Name	Alternative name for the product offering to help differentiate it from similar product names.
Display name	Name of the product offering that is added.
Offering type	Offering entity. Select one of the following types: ○ 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
Sellable	Option indicating that 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. **Note:** If you're using the Service Exchange Order Management for Providers application, select this option for a product offering. Only sellable product offers create remote catalog items. Offers with bundled configurations are not supported.
Description	Short description of the product offering. The description helps the order agent understand the product when placing an order.
Start date	Date and time that the product offering is available for Sales Customer Relationship 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 Customer Relationship Management applications. Select the

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Field	Description
	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. For example, you can specify web as a channel. You can specify multiple channels. **Note:** If you're using the Service Exchange Order Management for Providers application, enter Service Exchange as the channel.
Owner	Person responsible for the product offering.
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.
Product specification	Product specification to associate with the product offering. It provides a functional view of a product offering that drives order fulfillment. **Note:** Only published specifications appear.
Product model	Name of the product model.
Copy child specification characteristics	Option that when selected copies all child specification characteristics in a specification hierarchy. For example, if the product offer has an associated product specification, selecting this option indicates that the characteristics are inherited from the child specifications in addition to the parent specification.
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. **Note:** Pricing information is not visible on the consumer instance. If a default or other price list is configured for an offer, the price is calculated and updated only on the provider instance.
Periodicity	Recurring pricing: Monthly or annually.
Monthly recurring charges	Charges that recur every month. Monthly recurring charges are supported for backward compatibility. Use price lists to define prices.

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Field	Description
Non recurring charges	Charges that are applied once. Supported for backward compatibility. Use price lists to define prices.
Create contract	Option that indicates to agents that entitlement contracts can be added to the product order. If selected, service contracts are created after order fulfillment. Used when entitlements are managed as contracts.
Contract term	Length of the contract: ○ 12 months ○ 24 months ○ 36 months ○ 48 months ○ 60 months
Version	Version number that is assigned to this product offering version.
Initial version	Name of the product offering at the time you created the initial version.
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. You can't change this field.

4. Select **Save**.
5. Add additional characteristics to your product offering, if needed.
6. **Optional:** Add product visuals to your product offering.

   a. In the Product Visuals tab, 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.

7. When you finish creating the product offering version, select one of the following actions.

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What to do next

Associate consumer criteria to a remote record producer for this remote catalog item.

Create a service specification for a remote catalog item

Create a service specification on a Service Exchange provider instance. When you publish the service specification, a remote record producer creates the remote catalog item for the service specification.

Before you begin

Define the characteristics, characteristic options, and specification categories before you create a service specification.

Role required: sn_prd_pm.product_catalog_admin or sn_prd_pm.product_catalog_manager

About this task

When you create a customer facing service specification for a service request and you're using, use the **Distribution channel** field to set the channel to Service Exchange. When the service specification is published, a remote record producer is created for the specification.

Procedure

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

Service Specification

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

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Field	Description
	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 templates, the system checks for existing templates. ○ If the selected category has multiple templates mapped to it, the systems chooses the latest published template to the specification.
Type	Type of service specification: **Customer Facing** Customers can create a ticket or a case for the service. When you select this type, the **Distribution channel** field is displayed to specify how the service is provided, for example web. **Note:** If you're using Service Exchange Order Management for Providers, only Customer Facing Service specifications are eligible for remote catalog creation. Service Exchange must be specified as the Distribution channel so that remote record producers can be created. **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.

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Field	Description
	Note: ○ When you select Slice as the sub type, the templates are automatically selected based on the mapping of templates with the specification categories of service specifications in the decision table. ○ If you select None as the sub type, you can manually specify a template.
Start date	Date that the specification is valid from. Use this field when you create a version to indicate when it takes effect. It's informational only and isn't used for actual processing.
End date	Date up until which the specification is valid. Use this field when you create a version to indicate when it's no longer in effect. It is informational only and isn't used for actual processing.
Template	Templates that you've defined if you're using 5G services. **Note:** When you change a template, it deletes all the specification characteristics that are marked as true and are associated with the old template and re-associates the specification characteristics as per the new template that you've selected.
Description	Description for the service specification.
State	State of the service specification. **Draft** Unpublished draft service specification that is assigned when you first create the specification record. **Published** Published service specification that is assigned when you formally publish it for use in a product offering. **Retired** Service specification that is retired and can no longer be used to create another specification version. **Archived**

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Field	Description
	Service specification is no longer used in the ordering or fulfillment process.
Distribution channel	Option to set and lock in a distribution channel. For example, you can specify web as a channel. You can specify multiple channels. **Note:** If you're using the Service Exchange Order Management for Providers application and have a customer facing specification, enter Service Exchange as the distribution channel so that remote record producers can be created for remote catalog creation.
External code	Service code of the specification.
Line	Service line of the specification.
Cost to company	Cost to the company for this service specification. This field is for profit-calculation purposes only.
Composite	Option indicating that the service specification is a parent specification composed of multiple child specifications.
Installation required	Option indicating that someone must install the service on site.
Location specific	Option indicating that this service specification requires the location details for fulfillment and installation.
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.

3. Select **Save** and then **Publish**.
   A remote record producer creates the remote catalog item for the specification.

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What to do next

Associate consumer criteria to a remote record producer for this remote catalog item.

Associate consumer criteria to a remote record producer

In the provider instance, associate the appropriate consumer criteria to the remote record producer created for a remote catalog item. The consumer criteria determines which consumers are entitled to the catalog item. Service Exchange automatically generates the entitlement records that are replicated to eligible consumer instances.

Before you begin

By default remote record producers are available to all consumers. If you have specific criteria for certain users, define the consumer criteria for Service Exchange those users. For more information, see Creating entitlements in Service Exchange for Providers.

Role required: sn_sb.admin or admin

Procedure

1. In your provider instance, navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Catalog Items**.
2. Select the remote record producer for the product offering or service specification that your product catalog admin or manager created.
   Review the record to validate that it was created as expected.

   Note:
   A remote record producer, Manage Inventory, is created automatically when a product offering or service specification for a remote catalog item is published. You must associate the consumer criteria to this remote record producer and publish it so that your consumers can manage the product or service inventory from the service catalog on a consumer instance.

3. Navigate to the **Consumer Criteria** tab.
4. In the record for the Active criteria, under the **Remote consumer criteria** column, select and save the criteria to be associated to the catalog item.
5. Select **Publish**.
   Service Exchange automatically generates the entitlement records that are replicated to eligible consumer instances.

What to do next

Activate the entitlements for the remote record producer.

Activate the remote record producer

Activate the remote record producer in a Service Exchange consumer instance.

Before you begin

Role required: sn_sb.admin or admin

Procedure

1. In the consumer instance, navigate to **All** > **Service Bridge Consumer** > **Provider Connections**.
2. Select the Number link to navigate to the Provider connection record.
3. In the Remote record producers tab (related list), select the remote record producer to be activated.

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4. In the Remote record producer page, select **Activate**.
   The product offering or service specification is now available in the Service Catalog in remote record producer format.

Retire a remote catalog item

Retire a product offering or service specification used in a remote catalog, which automatically retires the corresponding remote record producer. When the remote record producer is retired, the remote catalog item is removed automatically from the service catalog on the consumer instance.

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 on the provider instance, select the **List** view.
2. Navigate to the published product offering or service specification to be retired.
   - To retire a product offering, navigate to **Offerings** > **Product Offerings** and select the product offering to be retired.
   - To retire a service specification, navigate to **Specifications** > **Service specifications** and select the service specification to be retired.
3. Select **Retire**.
   The product offering or service specification is set to the Retired state. The state of the associated record producer for the item changes from Published to Retired, and the product catalog item is deleted automatically from the service catalog.

Creating orders from Service Portal catalog items

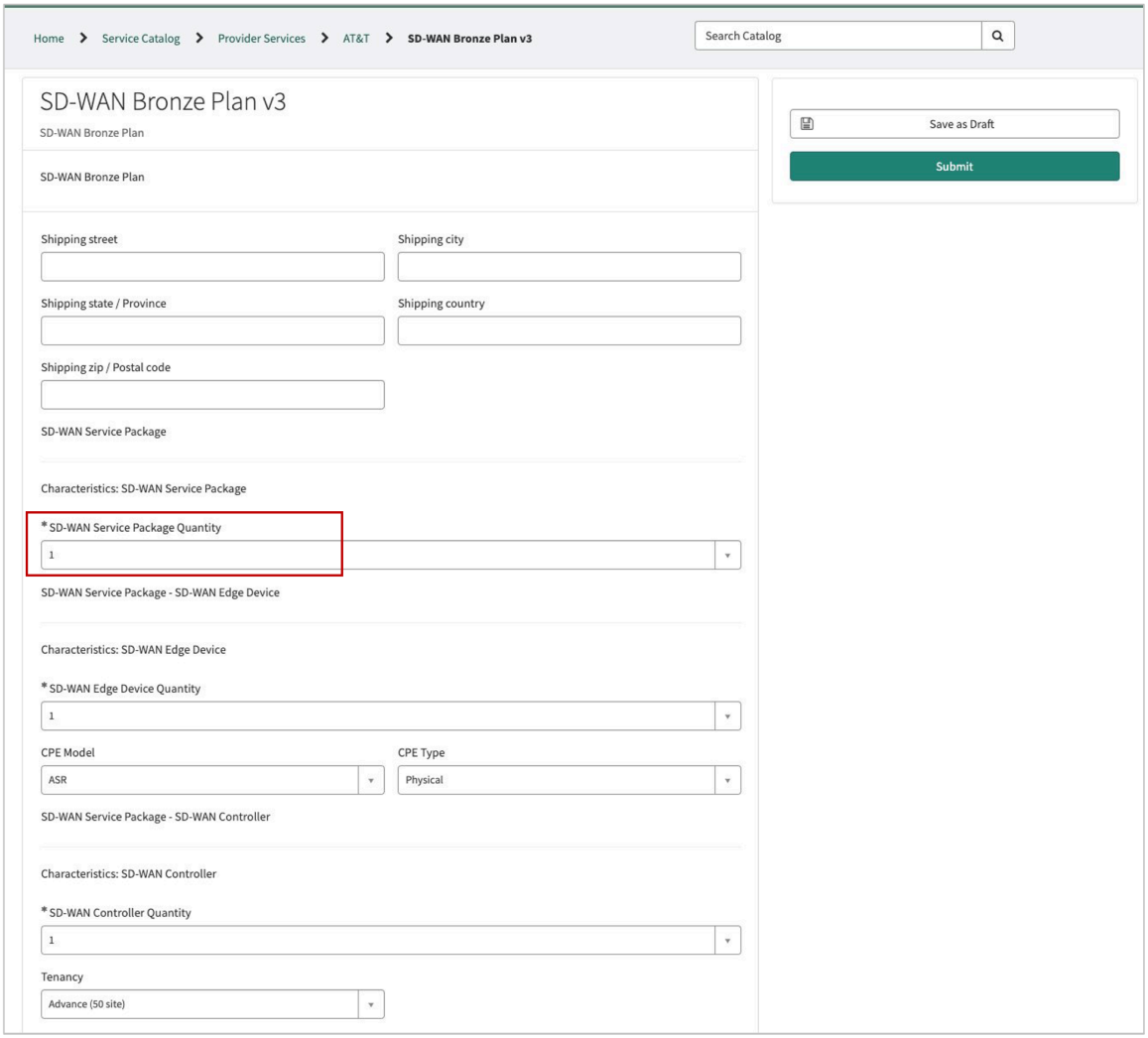
When consumers use the Service Portal on their instance, they can place orders for catalog items that have bundled product specifications. They can also cancel an order, and review and manage product and service inventory.

Orders for bundled products

Service Exchange remote catalog items can include bundled products that have composite components with different characteristic options that can be selected, including quantity.

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Example bundled product in service catalog



Cancelling an order

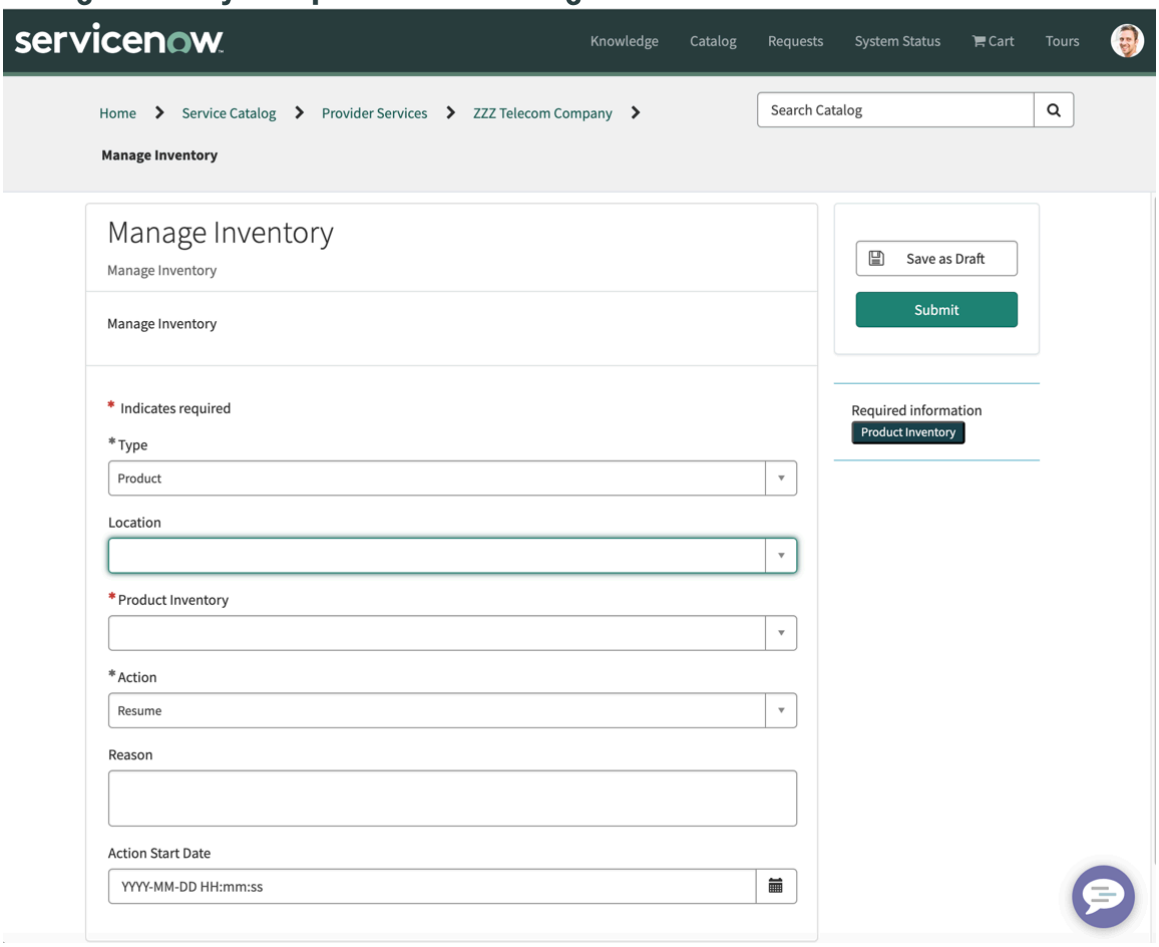
Consumers can cancel an order, if the order hasn't reached the point of not return (PONR). If the PONR has been reached, the consumer receives a status message indicating that the order can't be cancelled.

Managing product or service inventory

Consumers can view and manage the product or service inventory for products and services. They can use the **Location** field to filter the **Inventory** view by particular location. Consumers can also perform disconnect, suspend, or resume actions.

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Manage inventory example in service catalog



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.

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- 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 Use decision tables.

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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 information, see Decision Builder user interface.

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.

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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.

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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.

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- 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.

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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. • 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.	• it_project_user • sn_customerservice.projectmanager (if using Customer Project 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:	sn_ind_tmt_orm.order_creator

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SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles
	○ 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.	
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. • Read access to the Order task to Project Task related list in Order Management. • Read access to the Project Template Creation table.	sn_ind_tmt_orm.order_viewer
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	

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SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles
	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.

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Configuration step	Description
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.

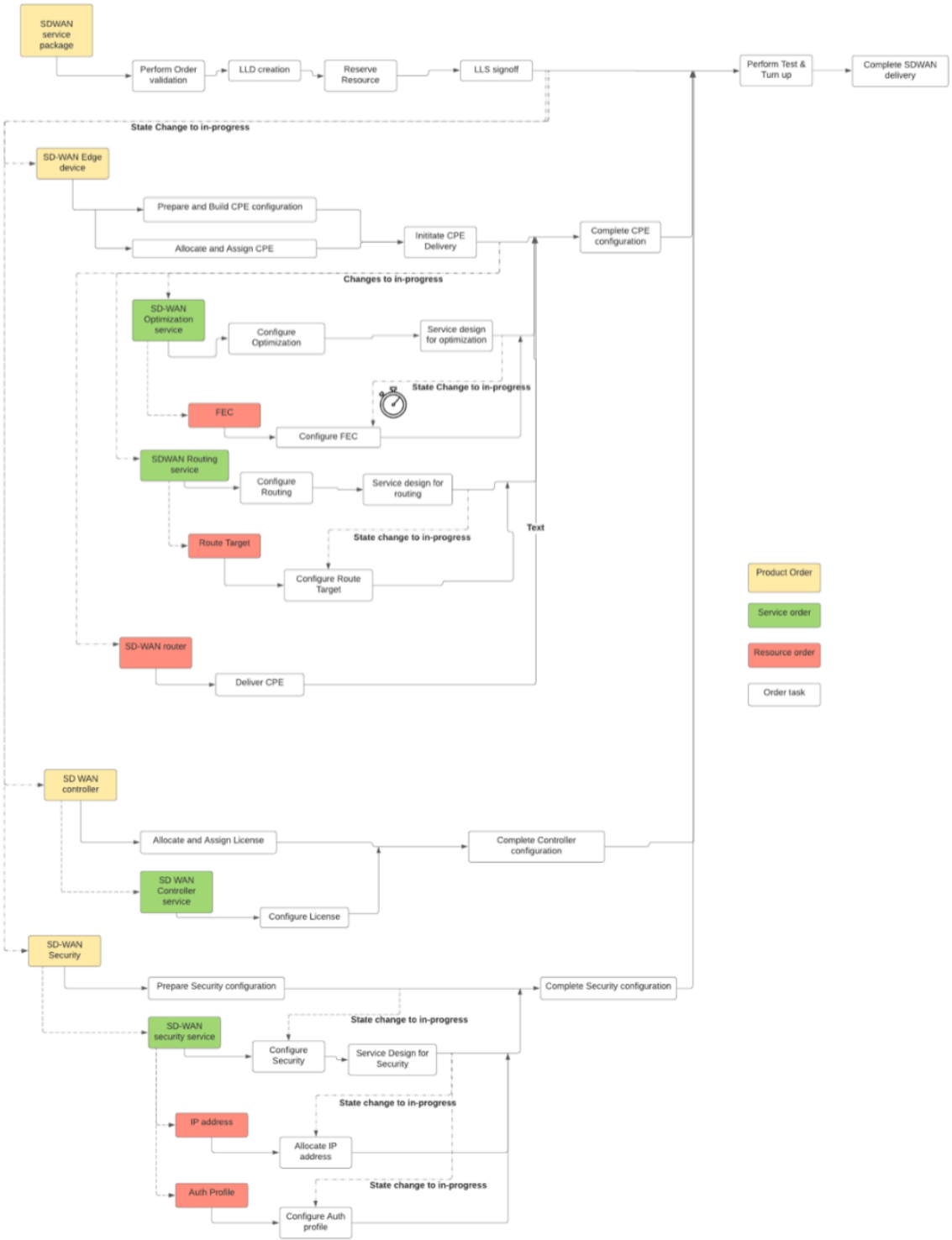
Note:
When you create project template tasks for domain orders and order tasks, be sure to anticipate inflight changes that may require additional planned tasks. Define those potential planned tasks in the template tasks so that the system can synchronize the planned tasks with the additional order tasks resulting from inflight changes in Order Management.

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.

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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.

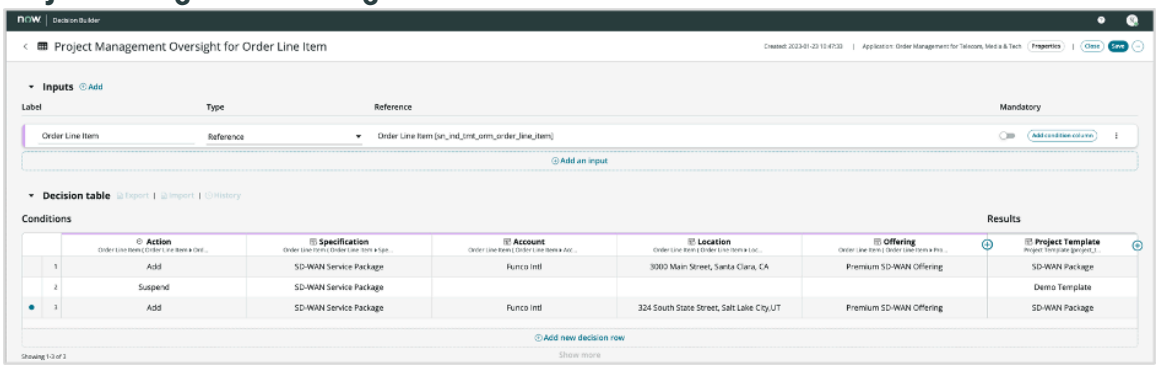
Set the conditions and decision rules for project oversight of order lines and associated domain orders and order tasks by using Decision Builder forms for order lines, domain orders, and order

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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



For more information on adding or changing conditions in decision tables, see Decision Builder user interface.

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.

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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.

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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.

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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.

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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.

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b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

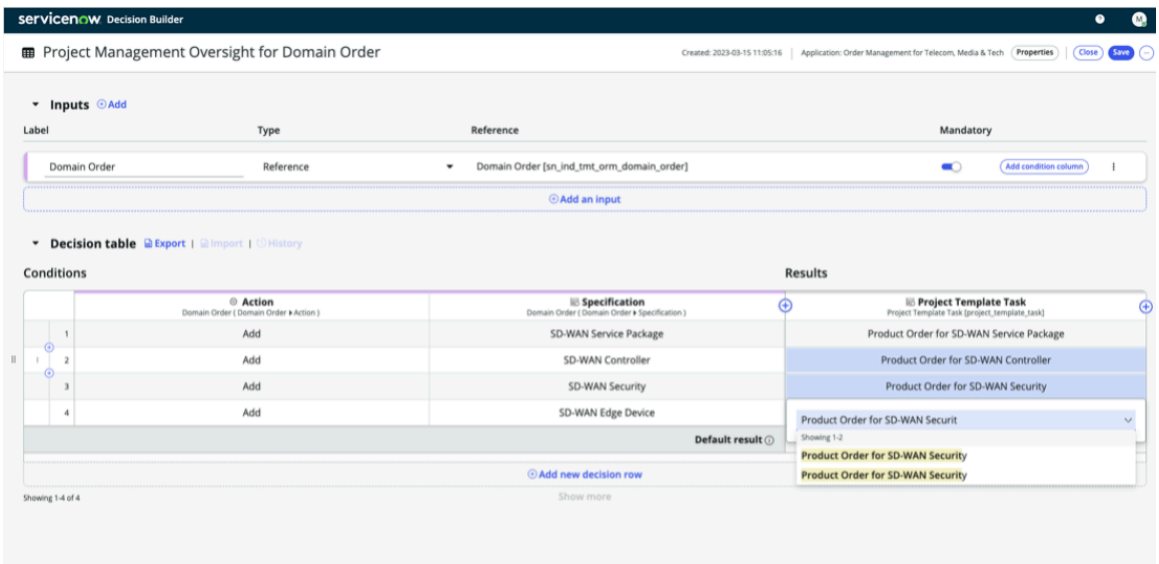
The system uses the specified project template task to create projects for order tasks that match the conditions and decisions rules defined in the Project Oversight for Order Task decision table.

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



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.

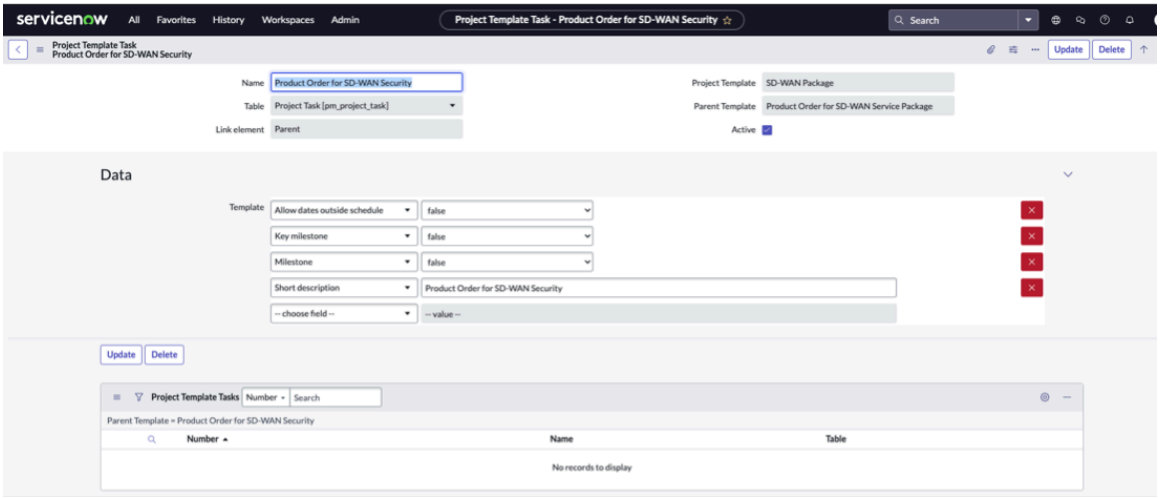
Before you begin

Role required: admin

Procedure

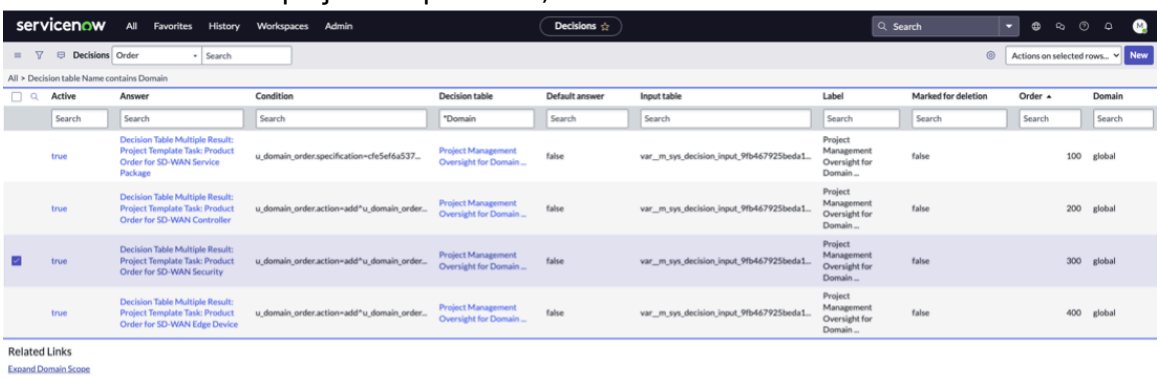
1. Navigate to **All**, and in the filter enter `project_template_task.list`.
2. Select the record for the project template task to be verified.

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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.

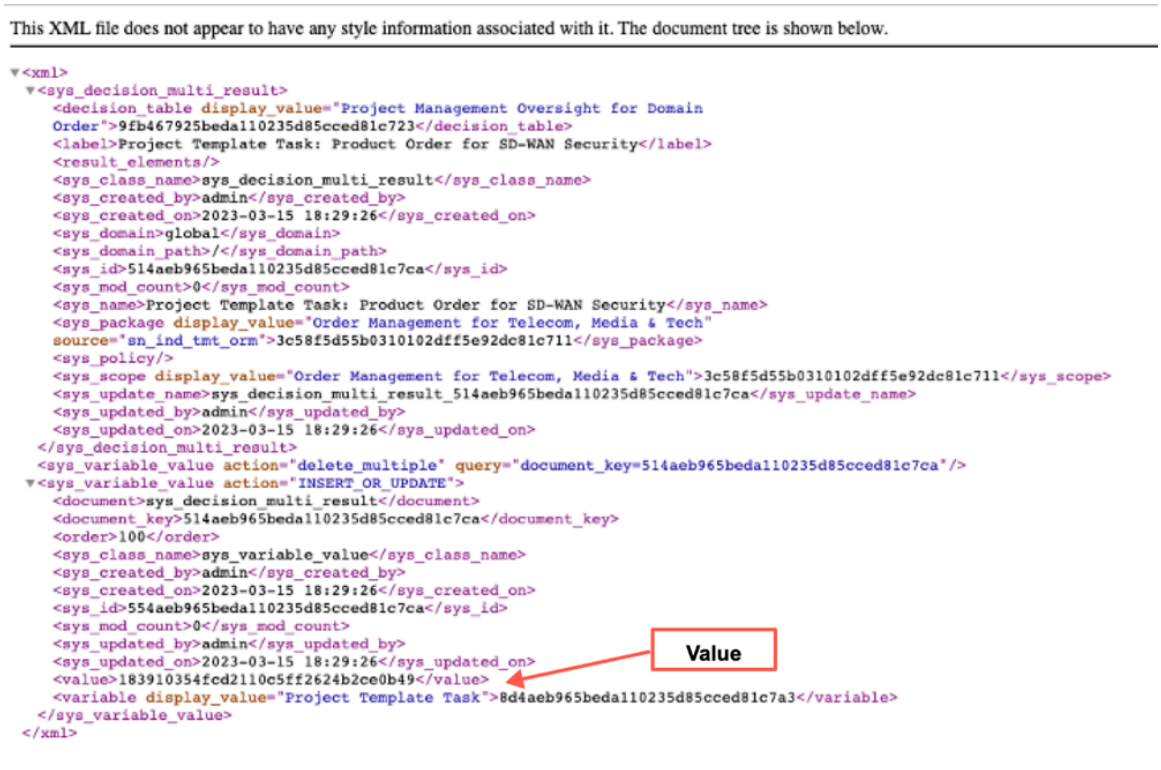
3. Check the value of the sys_id in the associated Decisions table entry.
   a. Navigate to **All** and in the filter, enter `sys_decision_question.list`.
   b. In the Decisions [sys_decision_question] table, locate the record of the corresponding decision table entry, for example Project Management Oversight for Domain Order.
   c. In the record for the project template task, select the **Answer** column.



The resulting record for the **Answer** field opens.

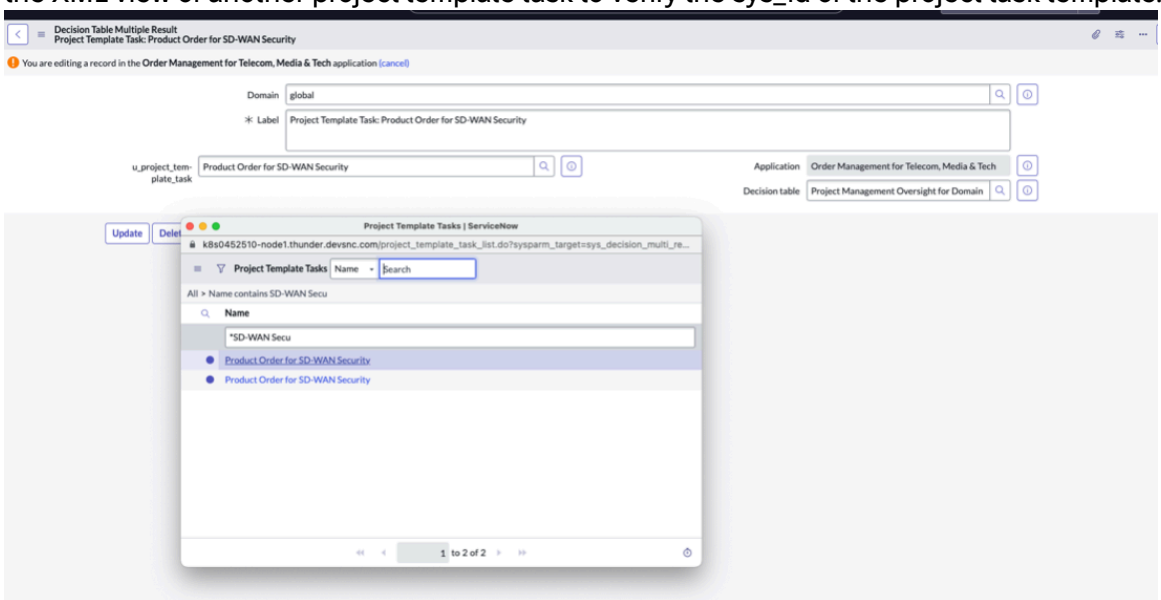
4. In the resulting record for the Decision Table Multiple Result, view the XML output by right-clicking the header bar of the record and selecting **Show XML**.
5. Review the XML and locate the sys_id value in the file.

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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.

6. 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

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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:

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- 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.

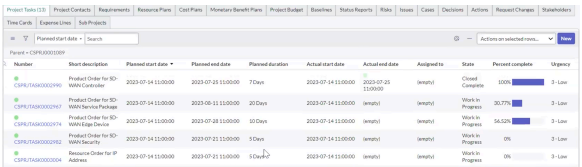
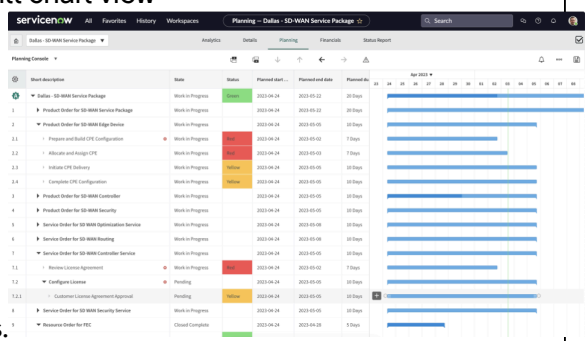
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Tracking projects for planned order tasks in SPM

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. 

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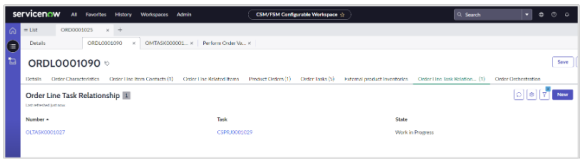
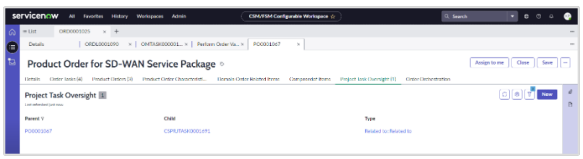
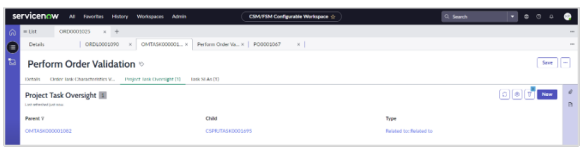
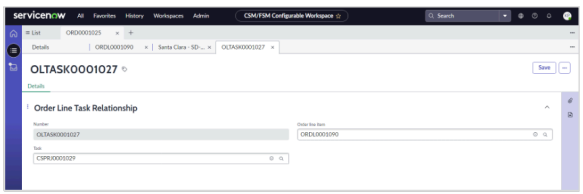
Project manager tasks (continued)

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	

Order Management diagnostics capability

Agents can use ServiceNow® Order Management diagnostics capability to diagnose and resolve service issues related to order tasks and domain orders.

Install these plugins:

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- Sales Customer Relationship Management plugin
- Service test management plugin

  For more information about service test management, see Setting up a test group and Setting up test definitions.

Diagnose and resolve an order task

As a customer service agent, review, diagnose, and resolve, and close an order task for the service-related issue experienced by the customer.

Before you begin

Role required: admin

To enable the display of the **Diagnose** tab and **Run diagnostics** in the conceptual panel, **Test and turn up** must be selected in the request type.

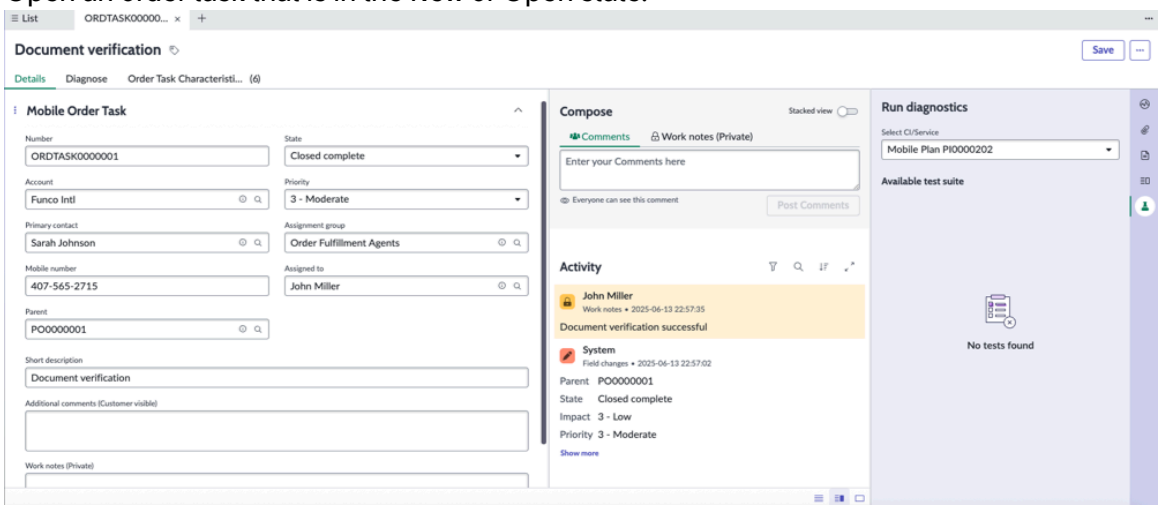
The decision table enables the Test and turn up to configure the trigger for any request definition. This out-of-the-box feature is shipped only for Test and turn up task.

About this task

The order task progresses through several stages from start to closure. It begins with a customer service agent reviewing and verifying the problem. Next is the diagnosis, where system-specified tests are executed to identify the root cause. After the tests, the agent moves to the repair, creating a task to fix the identified issue. The agent follows the instructions in the repair task to address the problem areas. Once the repair is complete, the task is retested to confirm that the issue is resolved. Finally, the order is moved to the next step toward delivery based on the customer's feedback.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Order Tasks** > **All**.
4. Open an order task that is in the New or Open state.



5. Review and verify the order task.
   a. In the **Details** tab, review and verify the general details for the order task.
6. Diagnose the order task to identify the root-cause of the problem.

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The decision table can be configured to control the visibility of the Diagnose and Run Diagnostics contextual panel tabs. For more information about decision tables, see Decision Tables.

a. To generate the test results, select **Run diagnostics** from the contextual panel.

b. In the run diagnostics panel, select **CI/Service** from the drop-down list.

The drop-down list shows the current product inventory linked to the parent record of order task.

To set up test definitions, see Setting up test definitions.

c. Expand the cards in the **Available test suite**.
To set up test group, see Setting up a test group.

d. In the manual test, select single/multiple tests.
In the automated test, selection of test isn't available. The subflow that is configured for the test group would be invoked.

e. Select **Configure**.

f. In the Configure tests, fill the test-required characteristics form to activate the **Run test** button.

g. **Optional:** In the test, select an option either to **Run test** now or to **Schedule test** for later.

h. Select **Run test**.

i. In the diagnose tab **Test results** section, select **Refresh list** icon.

j. In the diagnose tab, expand the **Test results** and review the results of the tests conducted in the previous step, checking whether each test is passed or failed.

The failed tests indicate that the issues causing the order task to be identified and need repair.

The maximum number of rows to the group is limited to 20 rows. To configure the maximum number of rows more than 20 rows to the group, see Presentational List Usage.

k. **Optional:** Select the **View Details** icon for a specific test result to review its details.

l. **Optional:** Select the **Rerun test** icon for a specific test result to run it again.

m. Select **Continue**.

7. Repair the order task by creating a new or automated repair task.
   - Select **Generate automated task** to automatically create a repair task.
   - Select **Create repair task** to manually create a customize repair task.

A Repair task is created for all failed test cases related to the diagnosed order task.

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a. Select the repair task that you want to work on.

b. In the Resolution task form, review the task details to identify the failed test and then work on those tests to fix the order task.

c. In the **Select** field, select an appropriate state from the list to update or close the repair task, such as Closed complete.

d. Select **Save** and close the resolution task.

e. Select **Continue**.

8. To view the characteristics values of the order task, select the **Order Task Characteristics Values** tab.

Diagnose and resolve a domain order

As a customer service agent, review, diagnose, and resolve, and close a domain order for the service-related issue experienced by the customer.

Before you begin

Role required: admin

To enable the display of the **Diagnose** tab and **Run diagnostics** in the conceptual panel, the **Test and Turn up** must be selected in the **Stage**.

The decision table enables the Test and turn up to configure the trigger for any request definition. This out-of-the-box feature is shipped only for Test and turn up task.

About this task

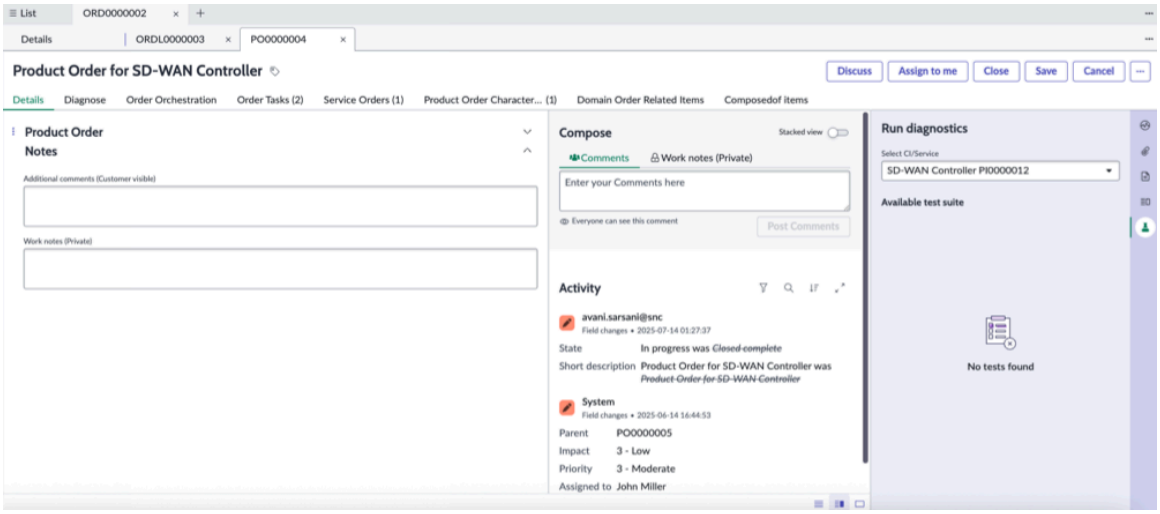
The domain order progresses through several stages from start to closure. It begins with a customer service agent reviewing and verifying the problem. Next is the diagnosis stage, where system-specified tests are executed to identify the root cause. After the tests, the agent moves to the repair, creating a task to fix the identified issue. The agent follows the instructions in the repair task to address the problem areas. Once the repair is complete, the task is retested to confirm that the issue is resolved. Finally, the order is moved to the next step toward delivery based on the customer's feedback.

This task is applicable for product order, services, and resources.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. Navigate to **Customer Orders** > **All**.
4. In the **Product Orders** tab, open the product order record.

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5. Review and verify the domain order.
   a. In the **Details** tab, expand the Product Order task and then review and verify the general details for the domain order.
   b. If necessary, in the Notes section, add **Additional comments** and **Work notes**.
6. Diagnose the domain order to identify the root-cause of the problem.

   The decision table can be configured to control the visibility of the Diagnose and Run Diagnostics contextual panel tabs. For more information about decision tables, see Decision Tables.

   a. To generate the test results, select **Run diagnostics** from the contextual panel.

   b. In the run diagnostics panel, select **CI/Service** from the drop-down list.

      The drop-down list shows the current product inventory and all the child inventories.

      To set up test definitions, see Setting up test definitions.

   c. Expand the cards in the **Available test suite**.
      To set up test group, see Setting up a test group.

   d. In the manual test, select single/multiple tests.
      In the automated test, selection of test isn't available. The subflow that is configured for the test group would be invoked.

   e. Select **Configure**.

   f. In the Configure tests dialog box, fill the test-required characteristics form to activate the **Run test** button.

   g. **Optional:** In the test dialog box, select an option either to **Run test** now or to **Schedule test** for later.

   h. Select **Run test**.

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i. In the diagnose tab **Test results** section, select **Refresh list** icon.

j. In the diagnose tab, expand the **Test results** and review the results of the tests conducted in the previous step, checking whether each test is passed or failed.

The failed tests indicate that the issues causing the order task to be identified and need repair.

The maximum number of rows to the group is limited to 20 rows. To configure the maximum number of rows more than 20 rows to the group, see Presentational List Usage.

k. **Optional:** Select the **View Details** icon for a specific test result to review its details.

l. **Optional:** Select the **Rerun test** icon for a specific test result to run it again.

m. Select **Continue**.

7. Repair the order task by creating a new or automated repair task.
   - Select **Generate automated task** to automatically create a repair task.
   - Select **Create repair task** to manually create a customize repair task.

   A Repair task is created for all failed test cases related to the diagnosed order task.

   a. Select the repair task that you want to work on.

   b. In the Resolution task form, review the task details to identify the failed test and then work on those tests to fix the order task.

   c. In the **Select** field, select an appropriate state from the list to update or close the repair task, such as Closed complete.

   d. Select **Save** and close the resolution task.

   e. Select **Continue**.
8. To view the Orchestration of the domain order, select the **Order Orchestration** tab.
9. To view the tasks of the domain order, select the **Order Tasks** tab.
10. To view the characteristics values of the domain order, select the **Product Order Characteristics Values** tab.
11. To view the details of the service order, select the **Service Orders** tab.
12. To view the details of the domain order related items, select the **Domain Order Related Items** tab.
13. To view the composed of items, select the **Composed of items** tab.

Sales Customer Relationship Management reference

Reference topics provide additional information about the Sales Customer Relationship Management applications.

Components installed with Sales Cart

Several types of components are installed with activation of Sales Cart including tables, user roles, and scheduled jobs.

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Roles installed

Role title [name]	Description	Contains roles
Cart editor [sn_sales_cart.cart_editor]	Creates, deletes, and edits sales cart and sales cart-related entities.	sn_sales_cart.cart_viewer
Cart viewer [sn_sales_cart.cart_viewer]	Views sales cart and sales cart-related entities.	

Scheduled jobs installed

Scheduled job	Description
Migrate proxy orders to sales cart	On-demand job that migrates draft proxy order carts to the new sales cart experience and sets the value of the *sn_sales_cart.show_cart_migration_msg* system property to true. **Note:** If you used the Business Portal and are upgrading to the Zurich release, then you must run the Migrate proxy orders to sales cart job after installing the Sales Cart plugin (sn_sales_cart). Customers then don't lose products added to their carts on the Business Portal.

Tables installed

Table	Description
Sales Cart [sn_sales_cart]	Stores the main sales cart record, including customer, billing, shipping, pricing, and state details.
Sales Cart Line Characteristic [sn_sales_cart_line_characteristic]	Stores characteristics and options associated with individual sales cart line items.
Sales Cart Line Item [sn_sales_cart_line_item]	Represents individual line items within a sales cart, including products, pricing, quantities, and hierarchical relationships.
Sales Cart Pricing Adjustment [sn_sales_cart_pricing_adjustment]	Stores pricing adjustments applied to a sales cart or its line items, including adjustment type, value, and related references.

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Lead-to-Cash Process Management reference

Reference topics provide additional information about Lead-to-Cash Process Management.

Components installed with Lead-to-Cash Process Management

Several types of components are installed with activation of the Lead-to-Cash Process Management plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Sales process record viewer [sn_l2c_cockpit.sales_process_record_viewer]	Views tables related to the sales process record.	• sn_customerservice.csm_workspace_user • sn_bo_core.business_process_record_viewer
Sales process record writer [sn_l2c_cockpit.sales_process_record_writer]	Views and writes tables related to the sales process record.	• sn_l2c_cockpit.sales_process_record_viewer • sn_bo_core.business_process_record_writer
Sales process manager [sn_l2c_cockpit.sales_process_manager]	Views, creates, and edits sales process records.	sn_l2c_cockpit.sales_process_record_writer

Tables installed

Table	Description
Sales Process Record [sn_l2c_cockpit_sales_process_record]	Stores records used for monitoring sales-specific entities.

Properties installed with Lead-to-Cash Process Management

Properties for Lead-to-Cash Process Management node map visualization.

These properties are available for Lead-to-Cash Process Management.

Note:
To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

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Properties for Lead-to-Cash Process Management

Property	Description
sn_l2c_cockpit.node_default_levels	• Type: integer • Default value: 3 • Location: System Property [sys_properties] table • Learn more: Customize hierarchical node map le
glide.ui.sn_l2c_cockpit_sales_process_record_activity.fields	• Type: string • Value: short_description,state,assigned_to,assignment discussion**,*EmailAutogenerated**,*Sidebar poste • Location: System Property [sys_properties] table

Components installed with Business Object Core

Several types of components are installed with activation of the Business Object Core plugin, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
Business object viewer [sn_bo_core.business_object_viewer]	Views tables related to a business object.	• sn_quote_mgmt_core.quote_viewer • sn_ind_tmt_orm.order_viewer • sn_opty_mgmt_core.opportunity_viewer
Business process record viewer [sn_bo_core.business_process_record_viewer]	Views tables related to the business process record.	sn_bo_core.business_object_viewer
Business process record writer [sn_bo_core.business_process_record_writer]	Views and writes tables related to the business process record.	sn_bo_core.business_process_record_viewer

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Role title [name]	Description	Contains roles
Business object writer [sn_bo_core.business_object_writer]	Views and writes tables related to a business object.	sn_bo_core.business_object_viewer

Tables installed

Table	Description
Business Process Resource [sn_bo_core_process_resource]	Tracks the objects and documents associated with a business process.
Business Object Relationship [sn_bo_core_obj_rel]	Indicates how entities are structurally connected within a process and outlines the relationships between different business object types. For example, a lead is linked to an opportunity through the **Lead** column in the Opportunity [sn_sales_opportunity] table.
Business Object Group Members [sn_bo_core_obj_group_members]	Defines the relationship between business object groups and their corresponding object types, specifying which entities belong to each group.
Business Process Task [sn_bo_core_process_task]	Tracks individual tasks within a process.
Business Object Type [sn_bo_core_obj_type]	Contains the entities involved in a process and its table. For example, for order-to-cash group, the entities can be lead, opportunity, quote, order, and their respective tables.
Business Process Record [sn_bo_core_process_record]	Stores records that are used for monitoring various business entities.
Business Object Group [sn_bo_core_obj_group]	Represents the logical grouping of entities involved in a process and the category for different types of business entities.

Components installed with Customer Engagement Sequences

Several types of components are installed with activation of the Customer Engagement Sequences plugin, including tables and user roles.

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Roles installed

Role title [name]	Description	Contains roles
Sequence viewer [sn_crm_sequence.viewer]	Views sequence-related records.	sn_crm_sequence.sn_crm_sequence_
Sequence task read granular [sn_crm_sequence.sn_crm_sequence_task_read_granular]	Granular role to grant read access to the sequence task records.	None

Tables installed

Table	Description
Customer Engagement Sequence Task [sn_crm_sequence_task]	Stores the sequence task records that are generated when a sequence is triggered.

The Customer Engagement Sequence Task [sn_crm_sequence_task] table extends the Task [task] table.

Partner Relationship Management reference

Reference topics provide additional information about Partner Relationship Management.

Member registration form

Use the member registration form on the Partner portal to register members to a partner organization.

Fields and descriptions on the member registration form

Fields on the member registration form on the Partner portal to register members.

Field	Description
Register staff	Whether the staff member is new or existing
Partner organization	Channel partner account to which the member is being registered.
First name	First name of the member.

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Fields and descriptions on the member registration form

Fields on the member registration form on the Partner portal to register members.

(continued)

Field	Description
Last name	Last name of the member.
User ID	Unique ID of the member.
Email	Email of the member.
Role type	Type of role that is assigned to a member, whether External Partner Manager or External Partner Associate. To learn more about the roles installed with PRM, see Roles and components of Partner Relationship Management.

Related topics

- Using Partner Relationship Management
- Register a member on Partner portal

General Inquiry form

Use the general inquiry form on the Partner portal to raise queries and get in touch with the enterprise.

Fields on the General Inquiry form

Fields on the general inquiry form on the Partner portal to connect with the enterprise.

Field	Description
Partner Organization	Partner organization to which the partner belongs.
Requested by	User who has raised the request.
Priority	Level of importance of the inquiry.
Subject	Overview of the inquiry.
What can we help you with	Detailed explanation of the inquiry.

Related topics

- Using Partner Relationship Management
- Raise an inquiry on Partner Portal

Channel partner table fields

Use the fields on the channel partner [sn_prm_channel_partner] table to manage and store information related to channel partners.

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Fields on the Channel Partner table

Fields on the channel partner table and their descriptions.

Field	Description
Number	Automatically generated number of the channel partner table. **Note:** By default, channel partner numbers start with the prefix CHPRTNR.
Name	Name of the channel partner.
Enterprise partner manager	Manager from the enterprise who is associated with the channel partner.
External partner manager	Manager from the channel partner that supervises partner member activities.
Status	Status of the channel partner, whether **Suspended** or **Terminated**.
Parent channel partner	Parent entity of the channel partner.
Company	Company that is associated with the channel partner.
Industry	Industry to which the channel partner belongs.
Activity	Updates and information related to the channel partner.

Related topics

Configure Channel Partner table

Partner program table fields

Enable channel partners to participate in structured initiatives designed to drive revenue, enhance market reach, and build customer relationships by using the Partner Program [sn_prm_partner_program] table.

Fields on the Partner Program table

Fields on the partner program table and their descriptions.

Field	Description
Number	Number of the program.
Name	Name of the program.
Description	Description of the program.
Active	Current state of the program, whether active or not.
Status	Status of the program. A partner program can have one of the following statuses.

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Fields on the Partner Program table

Fields on the partner program table and their descriptions.

(continued)

Field	Description
	• Draft • Approved • Rejected • Retired
State date	Start date to associate partners to a program.
End date	Date at which a program is deactivated.
Activity	Updates and information related to the program.
Domain	Domain to which the data belongs.

Related topics

Configure Partner Program table

Partner program relationship table fields

Establish a relationship between channel partners and partner programs with the Partner Program Relationship [sn_prm_partner_program_relationship] table.

Fields on the Partner Program Relationship table

Fields on the partner program relationship table and their descriptions.

Field	Description
Number	Unique number of the relationship.
Channel partner	Channel partner associated with this relationship. **Note:** This field is populated from the Channel partner [sn_prm_channel_partner] table.
Program	Program associated with this relationship. **Note:** This field is populated from the Partner program Program [sn_prm_partner_program] table.
Active	State of the program, whether active or not.
Status	Status of the partner program relationship.
Onboarded date	Onboarding date of a partner into the program.

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Fields on the Partner Program Relationship table

Fields on the partner program relationship table and their descriptions.

(continued)

Field	Description
Off-boarded date	Offboarding date of a partner from the program.
Activity	Updates and information related to the partner program relationship.

Related topics

Configure Partner Program Relationship table

Domain separation for Partner Relationship Management

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

All partner program records, partner program relationships, and channel partners are present in the domain of the associated program.

Related topics

Configure Partner Program table

Partner program table fields

Return Merchandise Authorization Case Management

Reference topic provides additional information about lists and forms that you can use to configure Return Merchandise Authorization (RMA) Case Management.

Return Merchandise Authorization case table fields

Information about Return Merchandise Authorization (RMA) case table fields.

RMA case table fields

List of fields on the rma case table. This table extends the case table. It defines and manages RMA Case.

Field	Type	Description
Request reason code	integer	Reason for RMA request. • Other • Defective • Wrong quantity • Damaged • Outdated • Not satisfied

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RMA case table fields

List of fields on the rma case table. This table extends the case table. It defines and manages RMA Case.

(continued)

Field	Type	Description
		• Wrong item • Not as described

Return Merchandise Authorization case line table fields

Information about Return Merchandise Authorization (RMA) case line table fields.

RMA case line table fields

List of fields on the rma case line table. This table extends the case line table. It defines and manages RMA Case Lines.

Field	Type	Description
Original quantity [original_quantity]	integer	Original quantity of the purchased item.
Defective quantity [defective_quantity]	integer	Quantity of defective items.
Approved quantity [approved_quantity]	integer	Quantity of items approved for RMA.
Customer expected resolution [customer_expected_resolution]	integer	Customer's preferred resolution. Options are: • Repair • Replacement • Refund
Proposed resolution [proposed_resolution]	integer	Proposed resolution by the seller. Options are: • Return • Replacement • Refund • Reject .
Repair type [repair_type]	integer	Location of repair. Options are:

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RMA case line table fields

List of fields on the rma case line table. This table extends the case line table. It defines and manages RMA Case Lines.

(continued)

Field	Type	Description
		• Onsite • Off-site

Return Merchandise Authorization roles

Information about Return Merchandise Authorization (RMA) roles.

Return Merchandise Authorization roles

Roles	Description	Contains roles
sn_csm_rma_case.csm_rma_case_creator	This role provides granular access to create RMA cases and RMA case Lines.	sn_csm_rma_case.writer
sn_csm_rma_case.csm_rma_case_viewer	This role provides granular access to read RMA cases and RMA case Lines.	None
sn_csm_rma_case.csm_rma_case_writer	This role provides granular access to edit or update RMA cases and RMA case Lines.	sn_csm_rma_case.viewer

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Now Assist for Order Management

Use the ServiceNow® Now Assist for Order Management to improve agent and customer productivity and efficiency in their respective workflows.

Get started

Explore	Configure	Use Now Assist for Order Management generative AI
		
Learn more about Now Assist for Order Management	Configure the Now Assist for Order Management application to get started	Use generative AI capabilities offered by Now Assist for Order Management

Important:

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

Troubleshoot and get help

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

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-

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making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

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

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

Exploring Now Assist for Order Management

With the Now Assist for Order Management application, you can use generative AI to summarize complex orders involving multiple products, services, and fulfilment tasks for faster, more accurate decision-making and improved customer responsiveness.

Now Assist for Order Management overview

AI summarization of orders provides a real-time, consolidated view of complex orders spanning multiple products, services, and fulfilment tasks. It empowers agents to:

- Enhance the customer experience with timely updates, clear communication, and seamless handoffs that lead to better satisfaction.
- Track changes and validate details to maintain consistency and transparency.
- Minimize errors and improve communication across suppliers and partners.
- Monitor tasks that are at risk of missing deadlines and take corrective action early.
- Assign tasks to appropriate resources based on priority and skill.
- Make rapid prioritization decisions to avoid delays.

Now Assist for Order Management skills

The Now Assist for Order Management application includes the generative AI skill that enables:

1. **Order Agent**: Quickly check order status, identify issues, and resolve them without navigating multiple tabs or line items.
2. **Fulfilment Agent**: Gain visibility into fulfilment progress, spot risks early, and intervene proactively.

Standalone AI agents in Order Management

Enable business-to-business (B2B) customers to submit order cases autonomously in simple conversational format from the Business Portal by simply describing their needs in natural language using the manage order operations agent. For more information, see Request order changes using Now Assist for Order Management.

Get started by performing the following tasks:

- Enable the manage order operations agent on the Business Portal
- Configure ATP API for the manage order operations agent

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Configuring Now Assist for Order Management

If you have the admin role, you can configure the Now Assist for Order Management application so that your agents can use the generative AI skills in CSM Configurable Workspace and in Platform.

Use the Now Assist Admin console to configure Now Assist for Order Management. Use Summarization for Order Management plugin to install and configure the generative AI skills.

Note:
Currently for the initial release, the plugin cannot be installed from the **Plugins** section of Now Assist Admin. As a workaround, you can install the application from Application Manager.

The Now Assist skills for SOM:

- Order Summarization for Order Capture
- Order Summarization for Order Fulfillment

Note:

Azure, Amazon bedrock, Now LLM, Now LLM LTS, and Google Cloud vertex AI are currently the providers for this Now Assist application's skills.

Configuring standalone AI agents

Business-to-business (B2B) customers can submit order cases using Now Assist from the Business Portal. Interaction channels include chat and voice options. Before you can use the manage order operations agent in the Business Portal:

- Enable the manage order operations agent on the Business Portal
- Configure ATP API for the manage order operations agent

Enable Voice AI agent support on your phone channels by installing the Now Assist Voice [sn_voice_aia]. For more information, see Deploy AI voice agents.

Related topics

Now Assist Admin console

Configuring Now Assist settings and features

Standalone agents in Order Management

Customize an order summarization skill in Now Assist for Order Management

If you have the admin role, you can configure the Now Assist for Order Management application so that your order agent and fulfilment agent can use the generative AI skills in CSM Configurable Workspace and in Platform.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. In the **Customer** workflow group, view the skills for the Now Assist for Order Management under SOM.
3. Copy the Order Summarization skill for customization.

   a. Choose either Order Summarization (Order Capture) or Order Summarization (Order Fulfilment) to make a copy of an active skill.

   Note:
   Only one version of a skill can be active at a time for each skill. If you create and activate a copy of the skill, any previously activated version of the skill is deactivated.

   b. Select the More actions icon ••• for the skill, and create a copy that you can customize by selecting **Make a copy**.

   The copy that you make is listed in the All section.

   c. Select **Activate skill** on the copied skill to open and modify it.
   A guided setup leads you through configuring General details, View order input, Customize prompt output, Define Availability, Define access, select display, and Review and activate of the skill to be customized.

4. In the General details step, fill in the fields.

   a. Enter a name and description for the skill.

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

   Note:
   The **More details on the skills** are read-only fields.

5. Configure the base input table fields and related lists for the different input templates (Product Order Capture or Service Order Capture) for the skill.

   Note:
   The **Choose base table** is a ready-only field.

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

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

   a. Select **+New base input field** and configure the base input table fields for each input template (Product Order Capture or Service Order Capture).

   Add multiple base input fields, as necessary.

   The following table lists the base input table fields and descriptions.

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Base input fields

Field	Description
Base input field	Field in the base input table whose value this skill uses in its response. For example, `Number`.
Field description	Description of the base input field value. For example, `Order number.`

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

The rule conditions determine when the input template is used. By default, the record state determines the input template that all LLM services use.

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

c. For each input template, select **+New data source** to configure the additional input data sources, as needed.

Adding input data source, like the related tables, provides more context to all LLM services in a related list.

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

The selection of the related table fields has a direct impact on the quality of the corresponding prompt header.

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

6. Customize prompt output.

Review and test the default prompt provided. The prompt is fixed and can't be customized directly in this step or from the Now Assist Admin screen.

To customize or create prompts, select **Edit prompt in *Now Assist* Skill Kit**. You are redirected to the *Now Assist* Skill Kit, where you can manage prompt configurations for the skill. For more info, see Now Assist Skill Kit

a. For each input template (Product Order Capture or Service Order Capture), select a record in the Test output section and test the prompt response output format by selecting **Run Test**.

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

7. Define how the skill is available to your users in the Define availability section.

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

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Select **+New condition set** to configure additional conditions, as needed.

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

8. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_ind_tmt_orm.order_agent automatically appears in **User access - Access Control List (ACL)**.
   - Select **Roles** to apply role restrictions whenever the skill is invoked, defining which data and resources (for example, tables) it can access in **Role restrictions to skill**.

   > **Note:**
   > In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you must manually select it in **Select Display** to make it active.

9. Configure **In-product desktop** to display the order summarization for Order Management.

   a. Select **In-product desktop** to display Now Assist skills on the forms and workspaces.
   For the skills that appear in-product, select the right arrow to identify the roles that can use the skill.

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

10. Review and activate the skill.
    Review your choices and select **Activate** to complete the skill customization.
    Select **Summarize** in an order to generate the order summary.

Enable the manage order operations agent on the Business Portal

Activate and associate the Manage order operations agent on the Business Portal so your customers can use it to submit order cases autonomously using Now Assist.

Before you begin

Activate and enable a chat assistant such as Now Assist in Virtual Agent to use in the Business Portal. For more information, see Configuring assistants overview.

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

Role required: sn_aia.Admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. On the Manage agentic workflows and AI agents page, select the **AI agents** tab.

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3. Select the **Manage order operations** agent to start configuring it.
4. On the Define the specialty page, select **Save and continue**.
5. From the navigation pane, select **Select channels and status**.
6. On the Select channels and status page, set the **Engage via Virtual Agent assistants** option to **Allow**.
7. Select a virtual assistant this AI agent should be made discoverable in from the **Choose chat assistants**.
   For this use case, select **Now Assist in Virtual Agent (Default)**.
8. **Optional:** Promote the agent to add it to the list of promoted topics.
   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. On the Assistant Designer, select the **AI agents** tab.
   c. Select **Promoted** from the More actions icon ⋮ for the Manage order operations agent.

Result
The chat assistant is activated in the Business Portal.

Related topics

AI Agent Studio

Promote or demote LLM conversational subflows, actions, and topics in Virtual Agent Designer

Assistant Designer Asset library

Configure ATP API for the manage order operations agent

Create an Available-to-Promise (ATP) API call that enables the manage order operations agent to check product availability and determine the earliest possible delivery date when customers request expedited shipping.

Before you begin
Application scope must be set to Order Exception AI Agents.

Role required: admin

About this task
The demo data for the manage order operations agent includes a sample implementation called orderExpeditionCheckDemo as part of the sn_ord_ops_aias.orderExpeditionCheckEP extension point. To enable real-world functionality such as checking on-hand quantities and delivery dates from external Enterprise Resource Planning (ERP) systems like SAP or Oracle, you should replace the demo data implementation with your custom ATP API.

Procedure
1. Log in to the ServiceNow instance.
2. Navigate to **All** > **Scripted Extension Points** > **Scripted Extension Points**.
3. Search for the sn_ord_ops_aias.orderExpeditionCheckEP scripted extension point in the API Name field.
4. Select **sn_ord_ops_aias.orderExpeditionCheckEP** to view the sample script included in the demo data.

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5. Select the **Create implementation** related link to create your own implementation of the sn_ord_ops_aias.orderExpeditionCheckEP extension point.
6. On the Script Include orderExpeditionCheckEP form, fill in the fields.
   For description of the Script Include form fields, see Script includes.
7. Edit the getAvailability function in the script to implementation your own logic for checking product availability and delivery dates.

Function name	Description	Input and output
getAvailability	Placeholder function meant to be overridden. This is where you would implement the logic to: ○ Query external inventory or ERP systems. ○ Determine if the product is available. ○ Calculate the earliest delivery date based on requested date and stock levels.	Input: The getAvailability function takes order number of the Customer order record and the revised date requested by the customer as input. Output: `{ "isAvailaible": <true/false - denotes if stock is available>, "earliestDelivery": <earliest delivery date in yyyy-MM-dd format>, "isError": <true/false - denotes if there is any failure in the API call>, "errorMessage": <error message string in case of failure> }`

8. Select **Update**.
9. **Optional:** Validate your implementation by requesting order changes from the Business Portal using the Now Assist Virtual Assistant.
   For more information, see Request order changes using Now Assist for Order Management.

Related topics

Using extension points to extend application functionality

Creating and adding a scripted extension point

Using Now Assist for Order Management

Use agents in an agentic workflow or as standalone agents to achieve specific automated outcomes.

If you have an agent role, you can summarize the order details and generate the order resolution notes with the Now Assist for Order Management application.

Summarize complex orders across products, services, and fulfillment tasks, enabling agents to quickly understand status, take the right actions, and avoid navigating fragmented views to make next steps easier and improving productivity.

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Standalone AI agents

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

For information on the standalone Order Management AI agents, see Standalone agents in Order Management.

Summarize an order using Summarization for Order Management

Generate a summary of a complex order for faster, more accurate decision-making and improved customer responsiveness.

Before you begin
Role required: sn_ind_tmt_orm.order_agent, sn_ind_tmt_orm.order_fulfilment_agent

For Admin, when both the skills are active the Order Capture Skill will take precedence.

Procedure

1. Navigate to **Workspaces** > *CSM Configurable Workspace* and open a Customer Orders.
2. In the Customer Order summary by Now Assist, select **Summarize**.
   The Customer Order summary by Now Assist appears above the activity stream. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

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

3. **Optional:** When you're finished summarizing an order, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Standalone agents in Order Management

Use AI agents in Order Management to complete sales and order-related tasks autonomously.

Standalone agents in Order Management

The Manage order operations agent is available in the Now Assist for Order Management application. You can enable Voice AI agent and provide conversation experience to the customers via phone. For more information, see Deploy AI voice agents.

Request order changes using Now Assist for Order Management

Request expedited delivery for your order in natural language using the Now Assist Virtual Assistant on Business Portal.

Before you begin
The following applications must be installed and configured on your ServiceNow instance:

- Now Assist for Platform (sn_genai_platform)
- Now Assist for Order Management (sn_now_assist_om)
- Order Case Self Service (sn_ord_case_ss)

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A working Available-to-Promise (ATP) API call must be configured to query your external inventory systems. For more information, see Configure ATP API for the manage order operations agent.

Role required: sn_customerservice.customer

About this task

When you submit a request through the Virtual Assistant, the AI agent performs the following actions behind the scenes to help you quickly and efficiently:

- Checks account information and order history.
- Validates the intent of the request. For example, if you enter “expedite” in the Virtual Assistant, the AI agent confirms that you’re requesting expedited order delivery for your open orders.
- Confirms the order number and your change request.
- Calls external ATP API to validate inventory availability and feasibility of the request. For example, the AI agent makes an ATP API call to an external ERP system to check if the ordered item is in stock for early delivery.
- Creates an order case in the ServiceNow system with requested details. If ATP call fails and the customer request is not feasible to fulfill, the AI agent still creates an order case so that the order case agent can review the request in the CSM Configurable Workspace and provide resolution.
- Posts the summary of the conversation as a work note in the order case which can only be viewed by the agents from the CSM Configurable Workspace.

Procedure

1. Log in to the Business Portal.
2. Select the Now Assist icon to launch the Now Assist chat panel.
3. In natural language, submit a request you would like for your order.

   Example
   For example, enter "Please expedite my order".
4. If your request is interpreted correctly by the AI agent, provide your confirmation.

   Example
   You can enter "That's correct" in the response.
5. Verify the order details displayed to you and specify an order for which you’re requesting changes.
6. Specify a date by which you want your order to be delivered or provisioned.
   The manage order operations agent validates whether your order can be expedited and fetches the earliest possible delivery date by triggering an ATP API call.
7. When asked about the feasible options, accept or reject the proposal in natural language.
   The AI agent creates an order case with a system-generated number starting with the prefix ORDCS. It also provides the order case link that you can select to view the order case details on the Business Portal.

Related topics

Configuring Now Assist for Order Management

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Using the Voice AI agents for Now Assist for Order Management

Use the Voice AI agents to create and manage cases for any order-related issues such as expediting orders with voice calls.

Managing order-related issues using Voice AI agent

Using the manage order operations Voice AI agent, you can do the following:

- Expedite order delivery dates for orders that are not in the draft state
- Use generic keywords such as, "Expedite delivery" or "Faster delivery" and get responses from agent in the context of your questions

The AI agent then creates an order case based on agreement of proposed delivery dates with the customer, and shares the order case number with the customer over the phone call.

dispute invoice issues now assist

Before you begin

Role required: admin

Procedure

Navigate to **All** > > .

dispute invoice issues voice agent

Before you begin

Role required: admin

Procedure

Navigate to **All** > > .

resolve invoice case now assist agent

Before you begin

Role required: admin

Procedure

Navigate to **All** > > .

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Now Assist for Sales Force Automation (SFA)

Use the ServiceNow® Now Assist for Sales Force Automation (SFA) application platform AI capabilities to deliver AI-powered insights and automation to drive faster, smarter sales and order processes.

Important:

- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected datacenters, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.

Get started

Explore	Configure	Use
		
Learn more about Now Assist for SFA	Configure the Now Assist for SFA application to get started	Use the Now Assist for SFA AI agents to complete tasks autonomously

Troubleshoot and get help

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

AI limitations

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

Data processing

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

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Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

Exploring Now Assist for SFA

With the Now Assist for Sales Force Automation (SFA) application, sales agents can manage the lifecycle of leads by automating outreach, follow-up communications, demo bookings, and handling lead disinterest or opt-outs. It can operate independently or under human supervision, thereby streamlining engagement and demo scheduling.

Now Assist for Sales Force Automation (SFA) overview

Sales agents use the Now Assist for Sales Force Automation (SFA) AI agent collection to complete these tasks autonomously:

1. Follow-up/Nudge Emails: Automated follow-ups at defined intervals if leads do not respond, with escalation to sales agents for disqualification.
2. Demo Booking/Rebooking/Cancellation: Reviews lead email replies to book, reschedule, or cancel demos, checking sales agent calendars and sending confirmations.
3. Lead Disinterest/Opt-Outs: Identifies disinterest or opt-out requests from emails, updating lead status and ensuring compliance (for example, unsubscribe links).

Now Assist for Sales Force Automation (SFA) users

User	Description
Sales Manager/Admin	Configure the AI agents.
Sales Agent	Access to Now Assist Panel.

Now Assist for Sales Force Automation (SFA) benefits

- Accelerates sales and order processing.
- Improves accuracy and reduces operational risk.
- Enhances user productivity with intuitive AI support.

What to explore next

To learn more about configuring and using Now Assist for Sales Force Automation (SFA), see:

- Configure Now Assist for Sales Force Automation (SFA)
- Use agentic workflows in Now Assist for Sales Force Automation (SFA)

Configure Now Assist for Sales Force Automation (SFA)

If you have the admin role, you can configure the Now Assist for Sales Force Automation (SFA) application so that agents can use the generative AI capabilities in the CSM Configurable Workspace.

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Before you begin

Use the Now Assist Admin console to configure Now Assist for Sales Force Automation (SFA). This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Now Assist Admin console.

Role required: admin

Procedure

1. Log in to the ServiceNow instance.
2. Install the Now Assist for Sales Force Automation (SFA) plugin (sn_som_gen_ai). For information about the installation process, see Install Now Assist plugins.

Use agentic workflows in Now Assist for Sales Force Automation (SFA)

Use the Now Assist for Sales Force Automation (SFA) AI agent collection to complete tasks autonomously.

The Help nurture new leads agentic workflow works with a team of AI agents to assist you with managing the life cycle of leads, either independently or under supervision.

Prerequisites to use an agentic workflow

The prerequisites to use an agentic workflow are as follows:

- Make sure that the Now Assist panel is turned on.
- Set up the work schedule for sales agents:
  - Navigate to **All** > **Agent schedule** > **Work schedule**.
  - Create a work schedule for sales agents.
- Duplicate the agentic workflow and activate the triggers.

Available agentic workflow for AI agent collection

Agentic workflow name	Description	Available AI agents
Help nurture new leads	• Outlines the steps required to engage the lead with the sales agent. • Sends initial outreach and follow-up emails. • Retrieves emails, classifies the intent, and routes it to the right sales agent to take action. • Schedules, reschedules, or deletes the appointments	• Lead outreach AI agent • Inbound email AI agent • Appointment management AI agent • Lead disinterest AI agent

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Available agentic workflow for AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
	based on sales agent availability. • Manages the leads who want to opt out or are uninterested.	

Important:
By default, all agent workflow and AI agent records are read-only.

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

- Activate the agentic workflow.
- Activate all agents in the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. The triggers for each agentic workflow must be unique. If you prefer to invoke it manually, activating the trigger isn't necessary.

Looking for an AI agent?

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

Help nurture new leads agentic workflow

Use the Help nurture new leads agentic workflow to process the entire lead record process.

Help nurture new leads agentic workflow overview

You can use the Help nurture new leads agentic workflow to do the following:

- Proactively engage with initial leads
- Book an appointment or demo to get the lead closer to qualification
- Identify opt-outs and disinterest for lead disqualification

To modify the Help nurture new leads agentic workflow duplicate it, and adjust the settings according to your requirements. You can activate the agentic workflow template by making triggers active and setting the display settings to include the Now Assist panel.

Important:
When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Help nurture new leads use cases

To access the use case:

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1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Use cases**.
2. Select **Help nurture new leads**.

Help nurture new leads AI agents

The following table lists the Help nurture new leads AI agents.

> **Important:**
> In the Define availability screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

AI agents and their roles in the Help nurture new leads use case

AI agent	AI agent role
Lead outreach AI agent	Initiates the outreach and follow-up flow. This flow supports sales agents by sending the initial outreach and follow-up emails.
Lead disinterest AI agent	Handles disqualification of the lead and opt-out requests.
Inbound email AI agent	Initiates the inbound response handler flow. This flow supports sales agents by retrieving and analyzing the latest email records. Based on its analysis, it recommends necessary actions required to move forward with the lead.
Appointment management AI agent	Assists in managing appointments for lead records. The agent is capable of creating, updating, or canceling appointments based on the availability of the lead owner.

Roles required to create an agentic workflow

The roles required to activate and access the workflow are as follows.

Roles and responsibilities

Roles	Responsibilities
Sales AI Admin	• Configure the agentic workflow. • Change AI settings. • Create and manage new workflows and AI agents.
Sales AI user	Interact with AI using the Now Assist panel.

Activating the agentic workflow

Activating duplicated workflow

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1. Navigate to the Help nurture new leads agentic workflow and duplicate it. The workflow also duplicates any triggers associated with that agentic workflow.
2. Navigate to the duplicated workflow and activate the trigger (the lead record is created or updated).

Note:
You can activate the triggers associated with the workflow.

Activating external triggers

1. Navigate to **All** > **System Policy** > **Email** > **Inbound actions**. There are 2 inbound actions that must be activated:
   - Activate the **Trigger agentic workflow for lead** inbound action.
   - Activate the **Trigger agentic workflow for lead task** inbound action.
2. Navigate to the SalesAIAgentsConstants script and change the value of HELP_NURTURE_NEW_LEAD_FLOW_ID property to the sys_id of the duplicated agentic workflow.

Nurturing a lead

To nurture a lead, perform the following steps:

1. Navigate to **All** > **AI Agent Studio**.
2. Review the information in the Describe and connect screen, make the necessary updates to ensure that the use case adapts to your requirements, and then select **Save and Continue**.
3. In the Define trigger screen, activate the triggers that adapt to your requirements, or create your own triggers, and then select **Save and Continue**.
4. In the Select display screen, perform the following steps:
   a. Select where you want the use case output to be displayed.
   b. Use the arrow next to it to add roles that can access the use case.

      Note:
      The sales_agent is the default role for the use case.

   c. Select **Save and test**.

The agent executes the testing in AI Agent Studio for the use case.

In the Now Assist panel, the agent receives a notification as soon as the interaction is generated, which enables them to follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the Now Assist panel.

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