

# **Now Assist Fulfiller Bundle Best Practices**

Accelerate your Fulfiller journey with proven best practices

Version: September 2025

Latest Release: Zurich Patch 1, Yokohama Patch 6

Send your feedback to [naaccelerationbundlefeedback@servicenow.com](mailto:naaccelerationbundlefeedback@servicenow.com)

# Notice

- ◆ Audience
  - Intended for approved ServiceNow partners and internal implementation specialists
  - Not intended for customer-facing use
- ◆ Important Notes
  - Provides implementation guidance, insights, and best practices based on early adopter experiences with recently released Now Assist capabilities
  - Includes access to unsupported Catalyst tools in the Innovation Lab to help accelerate implementations, for use at your discretion
  - Intended to complement, not replace, official ServiceNow documentation
- ◆ Version Snapshot (as of September 2025)
  - Includes select updates from Zurich Patch 1, Yokohama Patch 6
  - Excludes content on Agentic AI, which is covered in the [AI Practitioner Bundle Best Practices](#)
  - Feedback is encouraged to improve future iterations

# Overview

- ◆ This document is designed to speed up and streamline the foundational understanding, implementation, deployment, and adoption of the out-of-box (OOB) Now Assist capabilities for the fulfills persona for three business units:
  - [Now Assist for ITSM](#)
  - [Now Assist for CSM](#)
  - [Now Assist for HRSD](#)
- ◆ It provides a collection of fulfills persona-based best practices and guidance through the Acceleration Bundles to simplify the process.
  - General Best Practices for the Fulfiller Persona:

Implementing Now Assist fulfills capabilities requires familiarity with the fulfills agent's workflow within the customer's instance and how Now Assist will benefit them before beginning the implementation process. Awareness of the different Now Assist capabilities available within the workflow, common implementation best practices and troubleshooting guidance will contribute to a successful delivery:

    - [Overview of Now Assist skills for Fulfiller persona](#)
    - [Common Assessment Best Practices for the Fulfiller skills](#)
    - [Common Implementation Guidance across Fulfiller skills](#)
    - [Skill-specific Pointers for Fulfiller Persona](#)
    - [Handling Common Issues and Solutions for Fulfiller Persona](#)
    - [Latest Release highlights for the Fulfiller persona](#)
  - Acceleration Bundles covering the Fulfiller Persona:

The fulfills persona-based acceleration bundles listed below provide in-depth implementation guidance covering Instance Readiness Assessment, Plugin Installation, Now Assist Implementation, User Adoption, and Customer Feedback areas as well as detailed tips and best practices for each capability:

    - [Now Assist in Summarization and Generation Acceleration Bundle](#)
    - [Now Assist in Knowledge Management Acceleration Bundle](#)
    - [Now Assist – Change Request Acceleration Bundle](#)
    - [Now Assist – Sentiment Analysis Acceleration Bundle](#)

# Overview of Now Assist skills for Fulfiller persona

- ◆ The skills encompassed within the Fulfiller bundle will enable agents to work faster and more efficiently, ultimately accelerating overall productivity:
  - Summarization: Leverage generative AI to summarize Incident, Case, and HR case records
  - Resolution notes generation: Resolution notes are generated by extracting the root cause and steps taken to resolve the Incident, Case, or HR case record
  - KB generation: Generates Knowledge articles from closed Incidents, Cases, or HR cases
  - Change request: Extract key insights from a Change request to provide a suggested risk rating and an accompanying explanation
  - Chat:
    - Summarize Virtual Agent chat conversations for agents to review during a Live Agent transfer
    - Generate suggested replies that an agent can select with a click rather than typing the complete response
  - Sentiment analysis: View requestor sentiment, sentiment trend, and reasoning behind a particular sentiment.
  - Suggested steps generation: Accelerate CSM case/incident resolution and improve service quality by providing actionable, context-driven troubleshooting steps.
  - Identify duplicate KB articles using GAF: Detect redundancies by identifying duplicate articles within the Knowledge Base using Group-Action Framework (GAF)

# Common Assessment Best Practices for the Fulfiller skills

To ensure optimal functionality and value realization from Now Assist Fulfiller skills, several factors across different skills must be considered while assessing instances during the pre-implementation phase.

- ◆ Awareness: Review the readiness assessment tips provided in each of the skill-specific acceleration bundles carefully. They provide detailed insights into how best to perform such analysis and how to approach skill-specific scenarios.
- ◆ Data Quality: Check for the accuracy and completeness of records in Incidents/Cases/HR cases and Change Requests, which directly impact Now-Assist-generated Summaries, Resolution notes, and Knowledge articles
- ◆ Customizations: If there are customizations to the workflows or processes, tables, or fields, including choice values that are being used other than OOB, review them to ensure compatibility with Now Assist Fulfiller capabilities and follow the guidance provided in the individual bundles to address them.
- ◆ Now Assist Plugin Installation: Always install or upgrade Now Assist skills through the main BU plugins: Now Assist for ITSM/CSM/HRSD. Doing so will install or update the dependencies.
- ◆ Access roles: User roles control access to Now Assist skills. If custom roles are being utilized, consider whether they should access the Now Assist skill. Roles can be configured within the Now Assist Admin Console.

# Common Implementation Guidance across Fulfiller skills

The following factors impact the activation and functionality of the Fulfiller skills:

- ◆ Choose Input: Lists the inputs associated with the selected skill. The input headers are pre-selected and locked by default for the OOB skills.
- ◆ Customize prompt: One can [make a copy](#) of the OOB skill and then customize the copied version to include [different](#) prompts, fields, conditions, or data sources as inputs.
- ◆ Define availability: Configure the skill as (always) 'available' or 'condition-based'.
- ◆ Define Triggers: Select the trigger(s) that will initiate the selected Fulfiller skills.
- ◆ Select Display: You can select *In-product*, Now Assist panel, or both:
  - In-product: When selected, Now Assist skills are displayed on forms and workspaces. Select the down arrow to view the roles that can leverage the skill.
  - Now Assist panel: When selected, Now Assist skills are available in the Now Assist panel (If you don't see this option, you must [activate the Now Assist panel](#)). Select the down arrow to identify the roles that can use the skill



Note: The activation steps will vary slightly by skill.

The screenshot shows the ServiceNow Now Assist Skills configuration interface. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', and 'Ad'. Below the navigation is a secondary menu with 'Overview', 'Now Assist Features', 'Now Assist Experiences', and 'Ana'. The main content area is titled 'Incident summarization' under the 'ITSM' category. On the left, a sidebar lists configuration steps: 'General details' (selected), 'Choose input', 'Customize prompt', 'Define availability', 'Define trigger', 'Select display', and 'Review and activate'. To the right, the 'General details' section is expanded, showing fields for 'Name of the skill \*' (set to 'Incident summarization'), 'Add the name of the skill and a description', and 'Add brief description about the skill \*' (set to 'Use Now Assist to summarize incidents happening'). Below this, sections for 'More details on the skills' list 'Product workflow', 'Technology', 'LLM service', 'Now LLM', 'Skill template', and 'Incident summarization'.

## **Skill-specific Pointers for Fulfiller Persona**

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This section provides some key pointers around each of the individual fulfiller skills that can help during the implementation journey

# Summarization Skills Pointers

Summarization skills can provide a succinct summary of an incident, case, or HR case, enabling an agent to quickly get up to speed without reading through all the details within the record.

## ◆ Skill Insights

- Click the 'Summarize' UI action at the top of the form to generate a summary of the incident or case.
- Now Assist can summarize cases or incidents once they contain at least 50 words within the input fields.
- Starting with Yokohama Patch 3, we can extract and present contextually relevant information from transcribed JPEG and PNG attachments within generated incident summaries.
- When testing the skill, a record with rich content will provide better insights into the effectiveness of the Summarization skills.

## ◆ Common challenges and solutions

- Customizations, such as modifications to the names or labels of the input fields, will result in issues with summarization and need to be addressed. Similarly, using custom fields instead of the OOB input fields must also be addressed. The Prompt Configuration capability helps with such situations and is detailed within the Summarization Acceleration Bundle.
- Incorrect or incomplete summaries: Verify whether relevant fields (e.g., Description, Work Notes) contain meaningful data.
- When Summaries fail to generate, repairing or updating the Generative AI Controller plugin to the latest version may resolve the issue. Refer to [KB1700701](#) for guidance.

# Resolution Notes Generation Pointers

Quickly details how the incident or case was resolved by generating a condensed version of the record's resolution notes generated by the record's input fields, such as comments, work notes, and other fields.

## ◆ Skill Insights

- Resolution note generation is triggered when the agent attempts to resolve the incident or case.
- Agents can save time by using the skill instead of manually reviewing the record's history and drafting resolution content.

## ◆ Common challenges and solutions

- Refer to [this](#) community article for detailed guidance on handling additional mandatory fields during resolution so that Now Assist Resolution notes are generated seamlessly.
- The Community articles below provide solutions to common customization scenarios:
  - [ITSM-Handling Resolution customizations](#)
  - [CSM-Handling Resolution customizations](#)

# Knowledge Management Pointers

KB Generation within the Now Assist Knowledge Management skills allows one to quickly draft knowledge articles based on cases, incidents, or work order tasks within the record and from other similar past incidents or cases. This skill reduces agents' time commitment to create helpful self-service content to improve deflection rates.

- ◆ **Skill Insights**
  - The 'Create Knowledge' UI action allows agents to generate knowledge articles from resolved or closed incidents/cases.
  - Now Assist enables article creation from a single or multiple similar incidents/cases to generate more comprehensive knowledge articles to be drafted. Agents should review and refine the AI-generated content before publishing.
- ◆ **Common challenges and solutions**
  - The Now Assist modal pop-up to inform the user that Now Assist has commenced drafting the article occasionally fails to appear after clicking 'Create Knowledge' UI Action. Adding the Knowledge Gen AI UI formatters to kb\_knowledge typically resolves the issue. Refer to [KB1710178](#) for detailed guidance.
  - Role-based restrictions (added in Now Assist Admin console skill configuration) may not consistently be honored. While fixed in XP3, modifying the role-check condition in the 'Create Knowledge' UI action to control button visibility will resolve in prior releases. Refer to [KB1705341](#) for detailed guidance.



Note: Reviewing the Knowledge bases to identify optimization opportunities prior to implementing Now Assist KB generation will go a long way towards success. Leverage the [Knowledge and Search metrics](#) tool to gain such insights. Refer to the [Now Assist in Knowledge Management](#) acceleration bundle for guidance.

# Change Request Pointers

Expedite the Change request process by quickly capturing essential details and generating an associated risk explanation

## ◆ Skill Insights

- Clicking the 'Summarize' UI action on a Change Request (in states other than New or Canceled) generates a concise summary from the Short Description, Description, Implementation Plan, Backout Plan, Service Offering, and Justification fields.
- Clicking the Now Assist sparkle icon next to the Risk field in a Change request displays a Now-Assist-generated risk explanation in a window. Note that the Now Assist sparkle icon appears only after the risk is calculated.
- The Change Request Risk Explanation skill provides insights based on similar change requests, incidents caused by those changes, met risk conditions, and risk assessments.

## ◆ Common challenges and solutions

- If clicking on 'Summarize' renders the system unresponsive, repairing the Generative AI Controller and UXC Generative AI plugins may resolve the issue. Refer to [KB1939111](#) for the details.
- Customizations may cause the Change Risk explainer card not to be displayed within the Service Operations Workspace(SOW). Upgrading to the latest version of SOW, switching to the out-of-the-box record page, or reviewing the customizations and integrating them into a copy of the out-of-the-box record page should resolve the issue.

# Chat Skills Pointers

Summarize chats and provide agents with quick replies based on the context of the conversation with the Chat skills.

## ◆ Skill Insights

- Agents can review key details, reducing the need for the fulfillers to ask, and the requestors to repeat information already shared with the Virtual Agent.
- Summaries are generated in the following scenarios:
  - When an agent accepts a live agent request, summarize the Virtual Agent conversation
  - When an agent uses the /summarize quick action within Agent Chat
  - When the conversation or interaction ends, a summary of the entire interaction is generated
- Chat Reply Recommendation allows agents to generate quick replies in context by selecting the Now Assist icon in the chat message window, saving response time.

## ◆ Common challenges and solution tips

- When Chat skills are activated in multiple BUs, they need to be handled as per [KB1956098](#); otherwise, agents will see an error. Assigning specific roles exclusive to each BU tends to help in this scenario.
- If the Now Assist icon is not displayed when Chat reply recommendations(CRR) are activated, refer to [KB1974264](#) to review the portal details.

# Sentiment Analysis Pointers

**Sentiment Analysis on CSM Case / ITSM Incident:** Ability to view user sentiment and sentiment trend at all stages in the lifecycle of a case/incident, as well as the reason for a particular sentiment, to enable the fulfiller to make informed decisions.

**Sentiment Analysis on Account (CSM):** This dashboard provides powerful visualizations that offer deep insights into customer sentiments around case handling at the account level.

## ◆ Skill Insights

- Case/Incident level: Displays sentiment and sentiment trends across form and list view in both Core UI and Workspace, along with reasoning that helps agents understand customer mood and respond effectively to improve user satisfaction.
- Account Sentiment dashboard (CSM): This dashboard displays the sentiment of a business-to-business (B2B) account across cases with summary and detailed views. It can be analyzed using various filters and sorting dashboards that help Account Managers improve account handling.

## ◆ Common challenges and solution tips

- This feature is available from Yokohama Patch 3 or Xanadu Patch 9. Ensure the Now Assist ITSM/CSM, CSM Configurable Workspace, and Service Operations Workspace plugins are on the latest version.
- Ensure to add the Sentiment and Sentiment trend fields to both List and Form views on Incident/Case tables to make the field values visible
- Consider these two prerequisites for the CSM Account Sentiment dashboard to display data:
  - The Sentiment Analysis skill must be activated
  - Presence of at least one sentiment prediction

# Suggested Steps Generation Pointers

Uses Now Assist to analyze clusters of similar closed and resolved incidents/cases to suggest next steps

- ◆ Skill Insights

- Creates clusters of similar incidents/cases based on the case details
- Generates a synthesized response in the form of actionable, context-driven troubleshooting steps from similar incidents/cases within the recommended actions panel from the Group-Action Framework(GAF) clusters
- The quality of suggested steps is data-driven: Better resolution content = Optimal suggested steps
- Accelerates case/incident resolution and improves service quality
- The Skill is available as of the May '25 release - Yokohama Patch 3(YP3) or Xanadu Patch 9 (XP9)

- ◆ Common challenges and solution tips

- A minimum of 2000 cases/incidents is required to initiate the clustering process

# Identify Duplicate KB Articles Pointers

Identifies duplicate articles within the Knowledge bases, thereby empowering Knowledge Managers/admins to detect redundancies using the Group-Action Framework (GAF)

## ◆ Skill Insights

- This skill reduces duplication, consolidates information, and keeps content up-to-date - improving accuracy, consistency, and user experience.

## ◆ Common challenges and solution tips

- The Group-Action Framework must be installed. The skill is available as of the YP3 and XP9 (May '25 release)

## Handling Common Issues and Solutions for Fulfiller Persona

This section provides best practices for effectively handling issues should they arise as well as links to some common solutions

# Handling Common Issues with Fulfiller Capabilities

This section provides best practices for capturing, reporting, and resolving Now Assist Fulfiller-related issues, along with initial troubleshooting steps.

## Typical Areas Where Issues Arise

- Issues may arise from unmet prerequisites
- Configuration-related issues
- Query results are lacking sufficient or relevant content
- Customer-specific customization issues
- Legitimate product issues

## Key Details to Capture for Issue Reporting

- Detailed steps to reproduce
- User/persona experiencing the issue
- Location of the issue
- Issue observed in the portal or assistant?
- Expected behavior
- Actual behavior

# Common Fulfiller Issues & Solutions

The articles listed below contain frequently encountered issues and their solutions for the Fulfiller persona's skills:

## ◆ [KB1966206](#)

- Summarization
- Resolution notes generation
- Task Summarization
- Chat Summarization
- Chat Reply Recommendation
- Suggested Steps Generation

## ◆ [KB1977374](#)

- Change Request Summarization
- Change Request Risk Explanation

## ◆ [KB1990229](#)

- KB Generation
- Identify duplicate articles

## ◆ [KB2007343](#)

- Now Assist Admin Console
- Plugins
- AI Control Tower
- GAI Controller and other general issues

### Summary

The skill-specific tables below highlight some of the known issues around Now Assist Summarization, Resolution notes skills as of March 2025 that customers could encounter, along with recommended steps to help resolve them.

NOW ASSIST TASK SUMMARIZATION					
No.	Issue Scenario	Resolution or Workaround	PRB / Solution KB	Fixed in Release	Fixed Date
1	When reassigning a Ticket in SOW, the summarized notes which got pasted to work notes contain HTML tags.	Upgrade to the latest available store update.	PRB1828877	Now Assist for IT Service Management (ITSM) v9.0	January 2025
2	Generating a summary while transferring a case is only available in HR agent workspace. In Core UI when 'Transfer case' is clicked, the case will be transferred to another service without generating a summary.	Upgrade to the latest available store update.	PRB1810979	Now Assist for HR Service Delivery (HRSD) v8.0	January 2025
3	Now Assist fails to return any prediction results and instead throws an error (ex. "There was an error summarizing your case") in the UI to the user	Upgrade the Generative Ai Controller plugin to the latest available version.	KB1700701	Any release supporting Now Assist	NA
4	How to Handle custom choice values for State Field with Now Assist Summarization (ITSM, CSM, or HR) capability	Refer to the linked KB article for the workaround	KB1641107	Vancouver Patch4 and later releases	NA
5	Incident Summarization for incidents fails to return with long work notes with Now LLM provider	Refer to the linked KB article for the workaround	KB1993552	WP9 and Xanadu later releases	September 2024

# Latest Release Updates

- ◆ Benefit from the latest and greatest ServiceNow has to offer

It isn't news to anyone reading this that AI innovation is happening rapidly. Therefore, it is highly recommended that the latest versions of the Now Platform be implemented and deployed to take advantage of the latest advancements.

These improvements not only unlock new AI capabilities but also improve previously released AI capabilities and the supporting (behind-the-scenes) functionality that aids with, among other things, configuration, monitoring, and maintainability.

- ◆ New workflow/product-specific updates

The links below highlight the major feature enhancements for ITSM, CSM, and HRSD workflows related to Now Assist, many of which are Fulfiller persona-related:

- [Now Assist for IT Service Management \(ITSM\) release notes](#)
- [Now Assist for Customer Service Management \(CSM\) release notes](#)
- [Now Assist for HR Service Delivery \(HRSD\) release notes](#)

- ◆ Check out the latest available Now Assist agentic workflows by product

ServiceNow's Now Assist AI Agents, introduced in the Yokohama and Zurich release, mark a significant advancement in enterprise automation. With each ServiceNow family and store release, new or enhanced agentic solutions may be included within each product that encompass different Now Assist personas, like Fulfiller, Requestor, and AI Practitioner. Therefore, it is recommended to review these latest [Now Assist Agentic Workflows](#) regularly to avail yourself of such capabilities to the fullest!

# New Capabilities from the Latest Releases

- ◆ New capabilities in the Sept '25 Zurich Patch 1 release
  - Several new and improved agentic workflow updates are best represented in the [ITSM](#), [CSM](#), & [HRSD](#) release notes
- ◆ New capabilities in the July '25 Yokohama Patch 6 release
  - Now Assist Panel enhanced dynamic chat for an enhanced and fluid chat experience
  - Now Assist multi model provider flexibility allows configuring other model providers (Now LLM Service, Azure OpenAI, Google Gemini, or Anthropic Claude on AWS) at the instance, skill, or skill group level
- ◆ New capabilities in the May '25 Yokohama Patch 3, Xanadu Patch 9 release
  - Suggested Steps Generation in Recommended Actions/generation skill to suggest next steps for resolution by analysing clusters of similar closed and resolved cases/incidents.
  - Attachment Summarization to include contextually relevant data transcribed from JPEG and PNG attachments on all incident summaries.
  - Sentiment Analysis—Requestor level: Analyze the requestor's sentiment within an incident/case and explain the sentiment reasoning, trend, and score.
  - Sentiment analysis – Account level (CSM): Monitor and evaluate the sentiment of B2B accounts through a range of filters and sorting dashboards.
  - Identify duplicate articles within the Knowledge Base using GAF (Group Action Framework)

# New Capabilities from the Latest Releases (cont.)

- ◆ New capabilities in the March '25 Yokohama Patch 1, Xanadu Patch 7 release
  - KB Generation displays knowledge article templates that can be used to create articles, added Multi-language support, and can edit existing articles with Now Assist
  - Customize change risk skill with custom input fields to the following tables: 1) Change request, 2) Past similar change 3) Incidents caused by change
  - Chat replay recommendations support tonal change options: formal, casual, and sympathetic

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