**NextGen Winner’s Circle**

**FULFILLMENT MANAGEMENT GROUP**

**NATHANIEL**

**System Administrator**

* Possesses advanced knowledge of the core platform
* Is responsible for:
  + Day-to-day support
  + Upgrades
  + System integrity
  + Overall health/performance of the organization’s instances
* Knows the organization’s ServiceNow roadmap
* Is a key member of ServiceNow project teams to achieve roadmap goals
* Is aware of projects in progress, in the pipeline, and the team members involved
* Oversees instance security
  + Access control
  + Delegated development

**REYANNA**

**Workflow Developer**

* Executes Global Logistics Inc’s workflows
* Design and develop the workflows in ServiceNow, including the chargeback management process and inventory threshold monitoring
* Implement notification systems in Shopify for relevant personnel

**AARON**

**Business Analyst**

* Develops relevant content topics to reach the company's target mission
* Gather and analyze requirements from stakeholders related to chargebacks, fraud management, and inventory monitoring

**ANIA**

**Technical Writer**

Strong communication skills with the ability to convey complex information clearly

* Create Knowledge Base articles for each product implemented, documenting workflows, processes, and best practices to streamline operations and provide training materials
* Monitors, listens, and socially responds to users while cultivating leads and sales

**ASHLEY**

**Procurement Specialist**

* Define inventory management criteria, set thresholds, and ensure that procurement processes align within the flow
* Collaborate with the team to handle inventory-related notifications
* Curate PPT

**FUNMI**

**Quality Assurance Specialist**

* Test the workflows and processes to ensure they function as intended
* Identify and report any issues, and ensure compliance with business requirements

**TANIA**

**Fraud Analyst**

* Provides insights into chargebacks, analyze fraud patterns, and define risk levels
* Collaborate with the team to ensure that the workflow addresses various fraud scenarios

**Meet the Team**

**Nathaniel** and **Reyanna** work in a subdivision of the Logistics department at **Global Logistics Inc** *(a ServiceNow customer).* They are responsible for the organization's **Fulfillment Management** processes.

Currently, they are developing an app on the Now Platform to help them manage their three Fulfillment Management processes:

* Manage Shopify Chargeback Orders
* Monitor Inventory Thresholds
* Document Knowledge Base Articles

Initially, their System Administrator **Nathaniel** created the Fulfillment Management app and the first table (x\_x\_x]). He then granted the required access to Reyanna and Aaron, so they could continue building the app on their own. Nathaniel is available to mentor and help them if they have any questions along the way.

There is still a lot of development pending on the Shopify app. But Reyanna and Aaron have successfully automated the management approval process for chargebacks due to High Risk of Fraud orders being processed using **Flow Designer**. They have acquired some experience on the project and have some helpful tips and suggestions to share.

**PPT CHECKLIST:**

**o Who is in the team**

Nathaniel Rainwater Jr

Reyanna Pitts

Aaron Owens

Ania Nelson

Olufunmilayo Awosika

Ashley Alston

Tania Hardon

**o The problem you solved**

**Global logistics inc is a supply chain company that specializes in hardware products, such as the supercharger battery for major suppliers. We have found a way to automate our distribution processes with workflows that notify our suppliers when orders are processed. We have also created a workflow to capture and monitor fraudulant invoices, creating incidents when discrepancies occur, specific to fraud alert levels; 1 being Critical, 2 being High, 3 being Moderate, and 4 being Low. We have focused our knowledge base on informing customers about our hardware product, the supercharger battery, as well as the ordering process to purchase them.**

**Our knowledge base will be the supercharger battery, mirroring Strawberry sFone Knowledge Base & flow.**

**Our app is an efficient way for suppliers to process bulk orders, govern sensitive company data, and streamline processes and operations for their companies.**

Manage Shopify chargebacks for critical fraud alerts

Govern logistics by automating inventory thresholds

Providing documentation for application development via Knowledge Bases

o **How you solved the problem**

Fulfillment Management Group

Creating Knowledge Bases

Creating tables

Creating Service Catalog item

Creating record item

Created 2 separate flows:

* Chargebacks
* Logistics

**o Demonstrate your application**

 Everyone will explain their responsibilities in full detail

**o What features you would add if you had more time**

Any ideas or suggestions?

**o What challenges you encountered**

**Working as a team with effective communication skills & respect**

Deciding the name of the application

Deciding the company structure

Deciding the Service Catalog item

Deciding the record item

Creating the flows with email notifications, approvals, and rejections

Creating update sets to capture everyone's work throughout the project

**EXAMPLE COMPANY: COMPANY BREAKDOWN EXAMPLE:**

Parent - TJX Inc Parent - Global Logistics Inc

Child – TJ Maxx Child – Apple

Product – Painting Product - Battery

Category – Home goods Category – Hardware

Monitor was one of the Tables for the Social Media flow. Trigger was Record update.

Values: Source , Type , Priority, short description ?

Priority: 1 – Critical Negative Reject Rejection Notification

2 – High Negative Reject Rejection Notification

3 – Moderate Positive Review Approval Notification

4 – Low Positive Approve Approval Notification

Source:

Type:

Short Description:

**EMAIL NOTIFICATIONS:**

**Rejection Notification:**

\*\*Subject:\*\* Important Update Regarding Your Order

Hi \*\*‘orderFirstName’\*\*,

Thank you for choosing Global Logistics Inc. for your supply needs. We regret to inform you that your payment method for \*\*‘orderId’\*\* has been flagged as high-risk and cannot be processed on our platform.

If you would like to proceed with this order, please authorize an alternative payment method using the link provided above.

Thank you for your understanding.

Best regards,

\*\*[Your Name]\*\*

\*\*Group Manager, Fulfillment Management\*\*

\*This is an automatically generated email; please do not reply.\*

This email was sent to \*\*‘orderEmail’\*\* by Global Logistics Inc.,

555 Winners Circle Ave., Atlanta, GA 30305

**Approval Notification:**

\*\*Subject:\*\* Your Order Has Been Approved

Hi, Thank you for choosing Global Logistics Inc. for your supply needs! We are pleased to inform you that your order \*\*‘orderId’\*\* has been successfully placed. Your receipt is attached for your reference. You can track your order using the tracking ID \*\*‘orderTrackingId’\*\*.

Thank you for your business!

Best regards,

\*\*[Your Name]\*\*

\*\*Group Manager, Fulfillment Management\*\*

\*This is an automatically generated email; please do not reply.\*

This email was sent to \*\*‘orderEmail’\*\* by Global Logistics Inc.,

555 Winners Circle Ave., Atlanta, GA 30305

**NextGen Winner’s Circle**

**Fulfillment Flow**

**Overview**

At Global Logistics Inc., the following priority levels are in place to document the impact and urgency of high-risk fraud orders.

**Mention Type Priority Levels**

Negative 1 – Critical Fraud

2 – High Fraud

Positive 3 – Moderate Fraud

4 – Low Fraud

Global Logistics Inc’s Fraud priorities

P1 and P2 level orders will automatically notify a member of the **Fulfillment Management Managers** group to deny the order. P3 and P4 level orders will enter the order process automatically.

Responses to P1 and P2 level alerts must be reviewed by a member of the **Fulfillment Management** group. However, if Analysts would like to have a P3 or P4 alert assessed, they can also request a review. In this case, the response should be reviewed by the **Fulfillment Analysts** group’s Manager.

In both cases, whenever the user is ready to have their draft response reviewed, they have to select the **Request Approval**button. The UI Action updates the value of the *State* field to **Approval requested** and saves the record.

In this project, we will use the new value of the *State* field as the trigger that will launch the flow to request approvals and execute actions based on the approver's fraud alert.

**Create a New Flow**

1. **All > Workflow Studio**
2. Select **New,** then **Flow**
3. **Define flow details**

* Name: Fulfillment Management Managers
* Description: Fulfillment Management Managers
* Applications: Fulfillment Management

1. **Build flow**

**I believe we need a monitor table for the fraud properties.**

**Monitor [x\_snc\_social\_media\_monitor]**

**I’m not sure if ‘x\_snc’ is specific for anything, but this is just an example. I also believe once the table is created, it will code itself. I’m open to everyone’s input here to help those responsible for creating the tables.**

**Monitor [x\_snc\_fraud\_alert\_monitor]**

**/////////////////////////////////////////////////////////////////////////////**

**SOCIAL MEDIA RESPONSE EXAMPLE:**

**Create a New Flow**

1. **All > Workflow Studio**
2. Select **New,** then **Flow**
3. **Define flow details**
4. Name: **Social Media Response Approvals**

Description: **Social Media Response Approvals**

Application: **Social Media Management**

1. **Build flow**

**Configure the Trigger**

1. Select the **+** icon or the **Add a trigger** link in the Trigger section.
2. Select the **Record > Updated** trigger type.
3. Enter **Monitor [x\_snc\_social\_media\_monitor]**in the *Table* field.
4. Select the **+Add filters** link to the right of theCondition label.
5. Use the drop-down menu to set the condition:

**State|changes to|Approval requested**

1. Set the value of the **Run Trigger**field to **For each unique change** to ensure it runs every time the ‘Request Approval’ button is used.
2. Select **Done**.

**Configure the First Action**

1. Select the **+**icon or the **Add an Action, Flow Logic, or Subflow** link in the Actions section.
2. Select the **Action** button.
3. Within the **ServiceNow Core** category, select **Update Record**.
4. Identify the record to be updated by dragging the **Monitor Record** pill from the Data panel to the action’s **Record** field.
5. Select the **+Add Field Value** button to the right of the Fields label.
6. Use the drop-down menu to set the value of the **State** field to **Pending approval**.
7. Select the action’s **Add Annotation** button.  Note that this button appears in the upper right corner of the Action section (see graphic below) and looks like a + character in a conversation bubble.
8. Enter **State = ‘Pending approval’**.
9. Click **Done** and then save your changes by selecting **More actions** menu and selecting**Force Save** option.

**Test Your Work**

**Test Your Work**

In order to test your flow, you need to first create a record.  Keep the Workflow Studio browser tab open and return to your main ServiceNow browser tab.  Then follow these directions:

1. Navigate to **All -> Social Media Management -> Monitor**.
2. Select the **New**button.
3. Set the following values:

* **Source**: Facebook
* **Type**: Negative
* **Priority**: 2 - Wide-spread
* **Short description**: Links broken
* **Description**: The links on the Facebook page are broken

1. Select the **Submit**button.

You can test your work manually by selecting the **Request Approval** button on a Monitor record to trigger the flow, but you can also test your flow in Flow Designer itself.  For this test, you will use the latter method.  First, return to the Workflow Studio browser.  Now follow these steps:

1. With the Social Media Response Approval flow open, select the **Test** button on the Designer's header bar.
2. Use the Record drop-down menu to select the test record that you just created in the list.
3. Select the **Run Test**button to simulate the trigger and execute the flow.
4. After the Flow process completes, select the **Your test has finished running. View the flow execution details.**link.
5. Notice the **Execution Details** open on a new tab in the Designer.
6. Select the **Update Record** link in the Actions section to expand the action’s configuration and runtime details.
7. Notice under the Configuration label, the value of **state** is configured to 3 *(Pending approval)*. Also, under the Runtime Value label, the test record has the correct value after the flow executes.

TIP: You can also select a record's number anywhere in the Execution Details to see a preview of the record. Notice the value of State is ‘Pending approval’ after the flow executes.

1. Close the **Social Media Response Flow execution** tab when you complete your review.
2. Close the **Test Flow** popup window as well.

**You created a new flow that will execute every time the Request Approval button is selected on the Monitor form. The first action it takes is to set the value of State to ‘Pending approval’. You are off to a great start!**

**Overview**

In this activity, you will configure the flow to request approval from the appropriate group based on the Priority level of the triggering record.

* P1 or P2 records request approval from the **Social Media Managers** group.
* P3 and P4 records request approval from the**Social Media Analysts**group’s Manager.

**Add an 'If' Action**

An ‘If’ option is used to evaluate the conditions of the current record.

1. Open the **Social Media Response Approvals** flow in the Designer.

**Depending on how long it has been since you last worked on this flow, you may need to select the Edit flow button before continuing to the next step.  If you see this button, select it now.**

1. Select the **+** icon or the **Add an Action, Flow Logic, or Subflow** link below the Update Monitor Record action.
2. Select the **Flow Logic** button.
3. Select the **If** option.
4. Enter **Priority >= 2**in the Condition label field. Note that you will be adding two conditions for this step: the first is to check if the Priority is set to 1, and the second is to check if it is set to 2.
5. **Expand** the Monitor Record pill that is located under **1 - Update Record** and drag its **Priority** pill to the **Condition 1**field.
6. Use the drop-down menu to set the condition:

**Priority|is |1 - Brand damaging**

1. Select the **OR** button to the right of Condition 1.
2. Use Condition 2’s  **Data Pill Picker** to select the Monitor record’s **Priority** field.
3. Use the drop-down menu to set the condition:

**Priority|is|2 - Wide spread**

1. Select **Done**.
2. Save your changes.

**Configure the Branch for P1 and P2 Records**

Actions must be configured for both the ‘true (then)’ and ‘false (else)’ branches. Take the following steps to complete these actions:

1. Select the **Action** button that appears under the **if**statement:
2. Insert a **ServiceNow Core > Ask For Approvals** action.

Annotation: **From the Social Media Managers group**

Record: **Trigger > Monitor Record***(drag the data pill over or use the Data Pill Picker)*

Table: **Monitor [x\_snc\_social\_media\_monitor]***(automatically populates)*

Approval Field: **Approval***(automatically populates)*

Journal Field: **Approval history***(automatically populates)*

1. Configure the Rules.

**Approve or reject|When|Anyone approves or rejects**

1. Use the **Add Group** link to identify the **Social Media Managers** group.
2. Select **Done**.
3. Add another **If** Flow Logic option to the same branch.
4. Enter **Approval == Rejected** in the Condition label field.

When scripting, a developer uses:

* two equal signs '==' to compare an item to another item to determine if they are equal. Its like saying *“Is the value of Approval State field equal to rejected?”*. The comparison results in a true or false value.
* a single equal sign '=' to assign a value. In this case, it would be like saying *“I am setting the value of Approval State to rejected”*.

Here, you are using two equal signs in the Condition field to describe that you are comparing two values.

1. Drag the **Approval State**data pill that corresponds with the ‘3 - Ask for Approval’ action to the **Condition 1** field. This pill contains the response from the approver.

1. Use the drop-down menu to test for the condition:

* 1. **> Approval State|is|Rejected**

1. Select **Done**.

Notice the current buttons only show the true path of the**If** statement. There are still two branches, a true and false path, available. You can select the **(X)** icon to show the false path of the evaluation.

1. Select the **Action** button directly below **if Approval == Rejected**to configure the 'then' actions to follow if the approval IS rejected.
2. Insert a **ServiceNow Core > Update Record** Action.

Annotation: **State = Assigned**

Record: **Trigger > Monitor Record**

Table: **Monitor [x\_snc\_social\_media\_monitor]***(automatically populates)*

Fields: **State|Assigned**

1. Select **Done**.
2. Add an **End** **Flow** Logic option below the Update Monitor Record action. This will stop the execution of the flow. Remember that **End Flow** is found under **Flow Logic**.
3. Now select the **+** sign to configure the action to follow if the approval is NOT rejected.
4. Insert a **ServiceNow Core > Update Record**Action.

Annotation: **State = Approved**

Record: **Trigger > Monitor Record**

Table: **Monitor [x\_snc\_social\_media\_monitor]***(automatically populates)*

Fields: **State|Approved**

1. Select **Done**.
2. Add an **End** Flow Logic option below the Update Monitor Record action that is setting the value of State to Approved.
3. Save the changes to the flow.

**Configure the Branch for P3 and P4 Records**

1. Select the **Action** button at the end of the flow.
2. Insert a **ServiceNow Core > Ask For Approvals**action.

Annotation: **From the Assignment group’s Manager**

Record: **Trigger > Monitor Record**

Table: **Monitor [x\_snc\_social\_media\_monitor]***(automatically populates)*

Approval Field: Approval *(automatically populates)*

Journal Field: Approval history *(automatically populates)*

1. Configure the Rule:

**Approve or Reject |When|Anyone approves or rejects**

1. This time use the **Data Pill Picker** to select the **Assignment group’s manager**.
2. Select **Done**.

**Take a moment to look at the details of step #3 and step #9.  Both steps were created to Ask for Approval, with the only differences being the annotation and who will grant the approval.  It might have been easier to duplicate step #3 and move the duplicate down to step #9. Then you would only have had to modify the annotation and who approves.**

**In the next steps, you will use the duplicate method.**

1. Add an **If** Flow Logic option at the end of the flow.
2. Enter **Approval == Rejected** in the Condition label field.
3. Drag the **Approval State** data pill that corresponds with ‘9 - Ask for Approval’ action to the **Condition 1**field.
4. Use the drop-down menu to check for the value of **Rejected**.
5. Select **Done**.
6. Step #5 of the flow is exactly what you need for the next step. To save time, you will duplicate this flow by selecting the **Duplicate Action** button for step #5.  To see this button, you must move your cursor to step #5, then you can select the **Duplicate Action** button:
7. Now, move your mouse to the far left of the new step #6.  When your mouse pointer turns into a four-way arrow, you can click and drag the step down to below what is now step #11.
8. Open step #11 and verify that it looks like the following:
9. Select **Done**.
10. Add an **End** Flow Logic option below the *Update Monitor Record* action you just configured.
11. Step #7 is exactly the same step you need to create next.  Using the same technique that you used in the last few steps, duplicate step #7 and move the duplicate to the end of the flow.  The result should look like the following:
12. Select **Done**.
13. Save the flow.
14. You do NOT need an **End** Flow Logic option below the last item in a flow.

**Test Your Work**

1. Before testing your flow, check out its flow diagram by clicking the Flow Diagram toggle. Note that the following graphic does not show the entire flow.  Your flow should also have steps 9-13.
2. Recall that in an earlier activity, you created a record in the **Monitor**table of the **Social Media Management** application:

Take the following steps to use this record to test your flow:

1. With the **Social Media Response Approval** flow open on the canvas, select the **Test** button.
2. Use the *Record* drop-down menu to select the record you previously created.
3. Select**Run Test**.
4. Select the **Your test has finished running. View the flow execution details.**link.

Expand the **If Priority >= 2**details. Did the evaluation complete successfully (note that it should be "Evaluated - True" as shown below)? If not, review the configuration of the action and re-test.

1. Review the state of the Actions.

* Notice the first “Ask for Approval” is in a **Completed** state.
* The "Update Record" action (step 7) should also be marked as **Completed**.

Congratulations, you have completed this activity! Note that if this was a flow that you wanted to run automatically, you would now select the **Activate**button.

**Great job!**

**You built the automation process to configure the flow to request approval from the appropriate user based on the Priority level of the record.**