

## Create a Flow Designer Flow

### A. Create a Flow Designer flow from scratch

1. As the System Administrator, go to **Process Automation > Flow Designer**
2. Click the **+ New** button then choose **Flow** from the dropdown menu
3. Complete the form  
Name: **Infinity Item Request**  
Run As: **System User**
4. Select **Submit**
5. Select Take Tour to see how you can create, test, and run automated flows
6. After the tour, select **Completed** to get started and the Flow Designer interface will appear.

### B. Define a Trigger

1. Choose **Select to add a Trigger**
2. Select Service Catalog from the Application section
3. Click **Done** to complete the Service Catalog trigger

### C. Add an Action to Update a Requested Item Record

1. Select the plus **(+)** icon to the left of **Add an Action, Flow Logic, or Subflow**
2. Click **Action**
3. Go to the **ServiceNow Core** then click **Update Record**
4. Choose the Requested Item record to update
  - i. In the **Data** Panel, expand the **Trigger - Service Catalog**, if necessary.
  - ii. Drag and drop the **Requested Item Record** pill from the Data Panel to the **Record** field.
5. Click **+ Add field value** button
6. Set **State** to *Pending* and click **Done**
7. Click **Save** to save the changes you have made.

#### D. Add to Create Catalog Task Action

1. Select the plus **(+)** icon to the left of **Add an Action, Flow Logic, or Subflow**
2. Click **Action**
3. Go to **ServiceNow Core > Service Catalog** then select **Create Catalog Task**
4. Drag and drop the **Requested Item Record** pill from section **1 - Update Record** to the **Requested Item [Requested Item]** field.
5. Update the **Short Description** field to **Infinity Delivery**
6. For **Fields**, choose **+Add Field Value** and add the following

**Assignment Group | Service Desk**

**State | Open**

*Note: The **Wait** field is checked by default. This means that the flow is paused until the task is completed and is no longer active.*

7. Click **Done**.

#### E. Send an Email to the Requester

The flow will resume after the task is marked as *Closed Complete*. An email confirmation will need to be sent to the requester

1. Select the plus **(+)** icon to the left of **Add an Action, Flow Logic, or Subflow...**
2. Click **Action**
3. Locate **Send Email** action type under the **ServiceNow Core > Default**.
4. Click the **Data Pill Tracker** icon at the right of the **To** field and choose **Requested for**. *(Note: Clicking the Data Pill Picker icon will open a search box where you can dot-walk to choose the email address of the requested for)*
5. Highlight the **Trigger - Service Catalog**, select the **right arrow icon** on your keyboard to highlight **Requested Item...**
6. Select the **right arrow icon** again to dot-walk to the Requested Item table.
7. **Arrow down** to **Request**, then select the **right arrow icon** to dot-walk to the Request table. *(Note: You can also start typing the name of the field and then press the right-arrow key to dot-walk to the next table)*
8. **Arrow down** to **Requested for**, then select the **right arrow icon** to dot-walk to the User table.
9. **Arrow down** to **Email** and press **Enter key** on your keyboard. You will see the following in the **\*To** field

Trigger → Requested Item

Record → Request → Requested for → Email

10. Complete the following

Subject: **Your Infinity is on its way**

Body: **Greetings!**

**Get ready to be immersed in new worlds with your Infinity Portable Holographic Projected (PHP)!! Your requested item has been shipped and is expected to arrive soon.**

*Note: Place your cursor where you want to dot-walk and use the Data Pill Picker for Body to dot-walk to the correct fields.*

11. Click **Done**

#### F. Add an Action to Update the Requested Item Record

Request Management Hierarchy: Request → Request Item → Catalog Task

1. Click the plus (+) icon to the left of **Add an Action, Flow Logic, Subflow.**
2. Click **Action**
3. Go to the **ServiceNow Core** then click **Update Record**
4. Choose the **Requested Item** to record update:
  - i. In the **Data** Panel, expand the **1 - Update Record** section.
  - ii. Drag and drop the **Requested Item Record** pill from the Data Panel to the Record field.
5. Click the **+ Add Field Value** button
6. Set **State** to **Closed Complete** and click **Done**
7. Click **Save** to save the changes you have made.

#### G. Add an Action to Update the Request Record

1. Click the plus (+) icon to the left of **Add an Action, Flow Logic, Subflow.**
2. Click **Action**
3. Go to the **ServiceNow Core** then click **Update Record**
4. Choose **Request** record to update:
  - i. In the **Data** Panel, expand the **1 - Update Record** section if necessary
  - ii. Expand the **Requested Item Record** data pill

- iii. Drag and drop the **Requested Item Record - Request** pill from the Data Panel to the **Record** field
5. Click the **+ Add Field Value** button
6. Add field **State**.
7. Set **State** to ***Closed Complete*** and click **Done**
8. Click **Save** to save the changes you have made. The flow should have this sequence

#### **TRIGGER**

Service Catalog

#### **ACTIONS**

Update Requested Item Record

Create Catalog Task

Send Email

Update Requested Item Record

Update Request Record

### **H. Activate and associate flow to Service Catalog Item**

1. Click the **Activate** button. A message will appear confirming you would like to activate the flow - select **Activate**.
2. Go to the ServiceNow window and navigate to **Service Catalog > Catalog Definitions > Maintain Items**
3. Locate and open the **Infinity** item record
4. Go to the **Process Engine** tab and enter the **Infinity Item Request** into the **Flow** field.
5. **Update** the Infinity item record