

Basic Catalog and Order Capture

Lab 1.0

45 minutes

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Lab objectives

You will achieve the following objectives:

- Define a simple catalog model
- Capture an order for the product and services for the model
- View the Resulting inventory
- Capture a change order for the previously fulfilled product
- Capture a delete order for the previously fulfilled product

Lab Dependency: This is a foundational lab for all subsequent lab exercises. Do not skip.

Scenario

ServiceNow Order Management solution provides order capture UI to enable order agents to create product and service orders for customers.

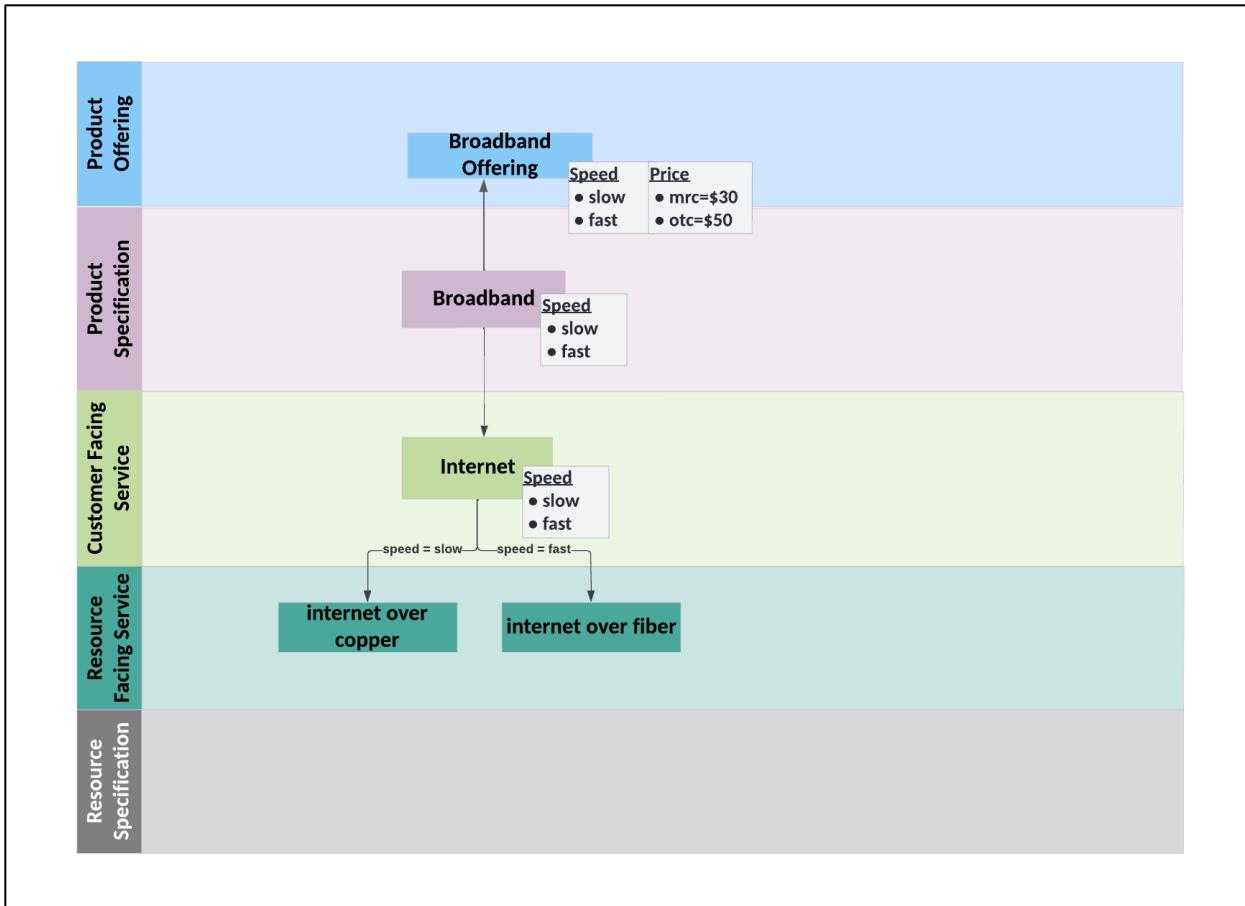
In this exercise, you will create a simple product and service specification and capture orders for new requests for those products to activate and change.

Section 1.0 Create a basic product and service specification

This section will create simple broadband and internet product/service specification.

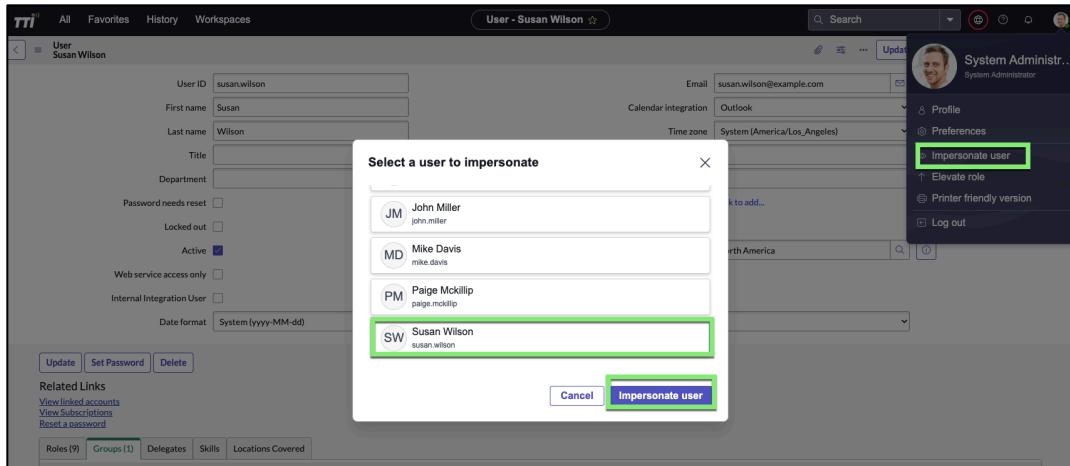
Section 1.1 Plan the Product – Service Model

Review the requirements for the product catalog as defined below. This is for a Customer Facing service of Internet, which can be realized by two different resource-facing services (technologies) Copper Internet (aka xDSL) or Fiber Internet (aka GPON). The Internet service has a characteristic of speed which can be 'fast' or 'slow.' The 'fast' speed is realized by fiber internet, and the 'slow' speed is realized by Copper Internet. We then built the internet service into a Broadband Product that could include more services. We then create a single product offering (for simplicity), defining the price and how to sell the product.

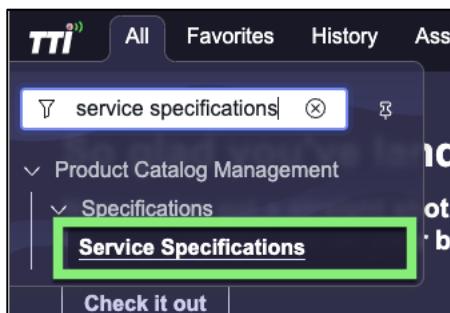


Section 1.2 Define the Product-Service Model

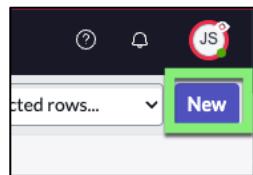
1. Log in to the student lab instance.
2. Impersonate **Susan Wilson**, the *Product Catalog Administrator*.



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



4. Select the New button to create a new Service Specification record.



5. Select the magnifying glass next to the **Category** field to open the **Specification Categories** list.

Number: SERSP01007

* Name: Internet over Copper

Version: 1

* Display Name: Internet over Copper

* Category: (highlighted with a green box)

Type: Resource Facing

* Start Date: 2022-07-20

End Date:

6. Select the **New** button to create a new **Specification Category**.

Specification Categories ServiceNow	
	Name
*	<input type="text"/> Search
All	<input type="button" value="New"/>
	<input type="button" value="Name"/>
	Broadband
	Firewall Device
	Firewall Management
	Firewall Zones
	Internet
	Internet over Copper
	Managed Firewall
	Managed Security
	Mobile Data Service
	Mobile Plan
	Mobile Service

7. Enter the following values

- Name: **Internet over Copper**
- Model Category: **Simple Model Category**

New Record | Specification Category | ServiceNow
 tsomttokyodemo.service-now.com/sn_prd_pm_specification_category.do?sys_id=-1&sys_is_list=true&sys_tar...

Specification Category
 New record

* Name Internet over Copper

* Model Category Simple Model Category

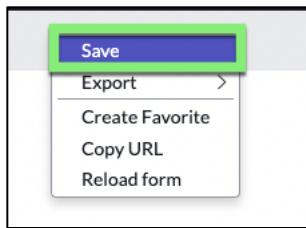
Activities

Submit

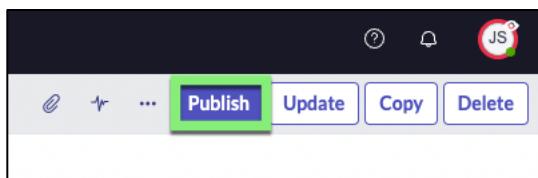
8. Select the **Submit** button to create the record.
9. Create the Service Specification **Internet over Copper** of type **Resource Specification** with the following values:
 - Name: **Internet over Copper**
 - Display Name: **Internet over Copper**
 - Type: **Resource Facing**
 - Start Date: **current date**
 - Description: **Internet service delivered over Copper or DSL**

Number	SERSP01007	State	Draft
* Name	Internet over Copper	Code	
Version	1	Line	
* Display Name	Internet over Copper	Cost to Company	
* Category	Internet over Copper	Composite	<input checked="" type="checkbox"/>
Type	Resource Facing	Installation Required	<input type="checkbox"/>
* Start Date	2022-07-20	Location Specific	<input type="checkbox"/>
End Date		Initial Version	
* Description	Internet service delivered over Copper or DSL	Previous Version	

10. Right-click on the header, select **Save** to save the record and stay on the **Service Specification** form.



11. Select the **Publish** button to publish the **Service Specification**.



12. Create another **Service Specification** record type **Resource Specification** for **Internet over Fiber** with the following values.

- Name: **Internet over Fiber**
- Display Name: **Internet over Fiber**
- Type: **Resource Facing**
- Start Date: **current date**
- Description: **Internet service delivered over Fiber**
- Category: **Internet over Fiber**

Note: create a new Category record with the name of **Internet over Fiber** and a Model Category value of **Simple Model Category**.

Number	SERSPO1014	State	Draft
* Name	Internet over Fiber	Code	
Version	1	Line	
* Display Name	Internet over Fiber	Cost to Company	
* Category	Internet over Fiber	Composite	<input checked="" type="checkbox"/>
Type	Resource Facing	Installation Required	<input type="checkbox"/>
* Start Date	2022-07-19	Location Specific	<input type="checkbox"/>
End Date		Initial Version	Internet over Fiber
* Description	Internet service delivered over Fiber	Previous Version	

13. **Save and Publish the Service Specification.**

14. Create another **Service Specification** record of **Customer Facing** for **Internet** with the following values.

Note: do not publish this specification record.

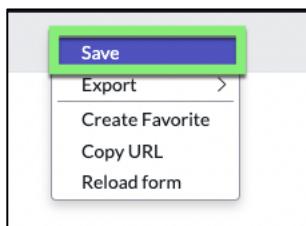
- a. Create a new **Category** value of **Internet** with a **Model Category** value of **Simple Model Category**. See steps #6 and #7 above.

- Name: **Internet**
- Display Name: **Internet**
- Type: **Customer Facing**
- Start Date: **current date**
- Description: **Internet service that can be delivered by multiple access technologies**
- Category: **Internet** (see step above)

Number	SERSPO1010	State	Draft
* Name	Internet	Code	
Version	1	Line	
* Display Name	Internet	Cost to Company	
* Category	Internet	Composite	<input checked="" type="checkbox"/>
Type	Customer Facing	Installation Required	<input type="checkbox"/>
* Start Date	2022-07-20	Location Specific	<input type="checkbox"/>
End Date		Initial Version	
* Description	Internet service that can be delivered by multiple access technologies	Previous Version	

15. Right-click on the header, select **Save** to save the record and stay on the **Service Specification** form.

Note: do not publish the Service Specification record



16. Select the **New** button under the **Specification Characteristics** Related List on the **Internet Service Specification** record.

The screenshot shows the ServiceNow interface for the 'Service Specification - Internet v2' record. The 'Activities' section displays a new activity created by Susan Wilson. The 'Specification Characteristics' related list is open, showing a table with columns: Characteristic, Characteristic Option, and Mandatory. A green box highlights the 'New' button at the bottom right of the list.

17. Add the following **Specification Characteristic** values to the **Internet Service Specification**

- Characteristic: **Speed**
- Characteristic Option: **Fast**
- Mandatory: **true**

Note: make sure the **Mandatory** field is set to true

The screenshot shows the 'Specification Characteristic - New Record' screen. The 'Characteristic' field is populated with 'Speed', 'Characteristic Option' is populated with 'Fast', and the 'Mandatory' checkbox is checked. The 'Submit' button is visible at the bottom of the form.

18. Select the **Submit** button to create the new **Specification Characteristic** record.

19. Add the following **Specification Characteristic** values to the **Internet Service Specification**

- Characteristic: **Speed**

- Characteristic Option: **Slow**
- Mandatory: **true**

Note: make sure the **Mandatory** field is set to true

* Characteristic	Speed	Specification	Internet
Characteristic Option	Slow	Mandatory	<input checked="" type="checkbox"/>

20. Select the **Submit** button to create the new **Specification Characteristic** record.

The Internet Service Specification should now contain the following two **Specification Characteristic** records.

Specification Characteristics (2)			Specification Relationships	Attribute Mappings	Versions (1)	Compatibility Rules	
			Characteristic	Search			
Specification = Internet							
<input type="checkbox"/>	Characteristic	Speed	Characteristic Option	Fast	Mandatory	true	
<input type="checkbox"/>	Speed		Slow		True	true	

21. Select the New button from the **Specification Relationships** tab on the **Internet Service Specification** record to create a new relationship record.

Publish	Update	Copy	Delete				
Specification Characteristics (2)				Specification Relationships	Attribute Mappings	Versions (1)	Compatibility Rules
Source Specification = Internet							
<input type="checkbox"/>	Target Type	Target Specification	Relationship Type	Mandatory	Minimum Quantity	Default Quantity	Maximum Quantity
<input type="checkbox"/>	Insert a new row...						

22. Create a new **Specification Relationship** record with the following values.

- Target Type: **Service Specification**
- Target Specification: **Internet over Copper**

- Relationship Type: **Requires**

The screenshot shows the 'Specification Relationship - New Record' form. The 'Relationship Type' field is highlighted with a green border and contains the value 'Requires'. Other fields include 'Source Specification' (set to 'Internet'), 'Target Type' (set to 'Service Specification'), and 'Target Specification' (set to 'Internet over Copper'). Below these, there are fields for 'Minimum Quantity' (1), 'Default Quantity' (1), 'Maximum Quantity' (1), and 'Quantity Characteristic' (empty). A 'Mandatory' checkbox is checked.

- Select the **Submit** button to create the **Specification Relationship** record.
- Return to the **Specification Relationship** record created in step #23 by selecting the reference icon and then the **Open Record** UI Action.

Specification Characteristics (2)		Specification Relationships (1)		Attribute Mappings	Versions (1)	Compatibility Rules
		Target Type: Service Specification Target Specification: Internet over Copper Relationship Type: Requires Mandatory: true				
Specification Relationship 						
Display Name	Internet - Requires - Internet	* Relationship Type	Requires			
Source Specification	Internet	Minimum Quantity	1			
Target Type	Service Specification	Default Quantity	1			
Target Specification	Internet over Copper	Maximum Quantity	1			
Mandatory	<input checked="" type="checkbox"/>	Quantity Characteristic				

- From the **Internet - Requires - Internet over Copper Specification Relationship** record, select the **New** button on the **Decomposition Rules** Related List to create a new decomposition record.

The screenshot shows the 'Decomposition Rules' list view in ServiceNow. At the top, there are tabs for 'Decomposition Rules' and 'Quantity Mappings'. Below the tabs is a search bar with dropdowns for 'Specification Relationship' and 'Search'. A message 'Specification Relationship = Internet - Requires - Internet over Copper' is displayed. The main area has columns for 'Source Specification', 'Characteristic', 'Characteristic Option', and 'Target Specification'. A large message 'No records to display' is centered. In the bottom right corner of the interface, there is a green box highlighting the 'New' button.

26. Create a **Decomposition Rule** with the following values.

- **Characteristic:** Speed
- **Characteristic Option:** Slow

The screenshot shows the 'Decomposition Rule - Create Internet - Requires - Internet over Copper' creation screen. It includes fields for 'Characteristic' (set to 'Speed') and 'Characteristic Option' (set to 'Slow'). To the right, 'Source Specification' is set to 'Internet' and 'Target Specification' is set to 'Internet over Copper'. A 'Submit' button is at the bottom.

27. Select the **Submit** button to create a new record.

28. Return to the **Internet Source Specification** record by clicking on the reference icon and selecting the **Open Record** button.

The screenshot shows the 'Specification Relationship - Internet - Requires - Internet over Copper' record view. It displays details for the relationship, including 'Source Specification' (Internet), 'Target Specification' (Service Specification with ID SERSP01012), and various configuration settings like 'Relationship Type' (Requires), 'Minimum Quantity' (1), and 'Default Quantity' (1). On the left, an 'Activities' section shows one activity entry. At the bottom, there are 'Update' and 'Delete' buttons.

29. Create another **Specification Relationship** record by selecting the **New** button from the **Specification Relationship** related list.

The screenshot shows the ServiceNow interface for managing specification characteristics. At the top, there are buttons for Publish, Update, Copy, and Delete. Below them is a navigation bar with tabs: Specification Characteristics (2), Specification Relationships (1) (which is highlighted with a green box), Attribute Mappings, Versions (1), and Compatibility Rules. The main area displays a table for 'Source Specification = Internet'. The table has columns: Target Type, Target Specification, Relationship Type, Mandatory, Minimum Quantity, Default Quantity, and Maximum Quantity. A single row is shown: Target Type is 'Service Specification', Target Specification is 'Internet over Copper', Relationship Type is 'Requires', Mandatory is 'true', and both Minimum, Default, and Maximum Quantities are '1'. There is also a link to 'Insert a new row...'. At the bottom of the table is a pagination control showing '1 to 1 of 1'.

30. Enter the following values for the **Specification Relationship** record, right-click on the header, and select **Save** to remain on the form.

- **Target Type:** **Service Specification**
- **Target Specification:** **Internet over Fiber**
- **Relationship Type:** **Requires**

The screenshot shows a 'Specification Relationship - New Record' form. It includes fields for Display Name, Source Specification (set to 'Internet'), Target Type (set to 'Service Specification'), Target Specification (set to 'Internet over Fiber'), Relationship Type (set to 'Requires'), and quantity fields for Minimum, Default, and Maximum Quantities all set to '1'. A 'Mandatory' checkbox is checked. The 'Activities' section is collapsed. At the bottom are 'Submit' and 'Cancel' buttons.

31. From the **Internet - Requires - Internet over Fiber Specification Relationship** record, click the New button on the **Decomposition Rules** Related List to create a new record.

The screenshot shows the 'Decomposition Rules' related list for the 'Internet - Requires - Internet over Fiber' specification relationship. The list has tabs for Decomposition Rules and Quantity Mappings. The main area shows a table with columns: Specification Relat (Search), Source Specification, Characteristic, Characteristic Option, and Target Specification. The table is currently empty, displaying 'No records to display'.

32. Create a Decomposition Rule with the following values.

- **Characteristic:** **Speed**
- **Characteristic Option:** **Fast**

The screenshot shows the 'Decomposition Rule - Create Internet - Requires - Internet over Fiber' screen. It displays two fields: 'Characteristic' (containing 'Speed') and 'Characteristic Option' (containing 'Fast'). Below these fields are 'Source Specification' (set to 'Internet') and 'Target Specification' (set to 'Internet over Fiber'). At the bottom right is a 'Submit' button.

33. Select the **Submit** button to create the new record.
34. Return to the **Internet Service Specification** record using the reference icon and selecting the **Open Record** button.

The screenshot shows the 'Specification Relationship - Internet - Requires - Internet over Fiber' screen. A modal window is open, showing the details of a 'Service Specification' record. The modal includes fields for Display Name ('Internet - Requires - Internet over Fiber'), Source Specification ('Internet'), Target Specification ('Internet over Fiber'), Relationship Type ('Requires'), Minimum Quantity ('1'), Default Quantity ('1'), Maximum Quantity ('1'), and a Quantity Characteristic field. The modal also contains a 'Description' field with the value 'Internet service that can be delivered by multiple access technologies'.

35. The following **Specification Relationship** records should be on the **Internet Service Specification** record.

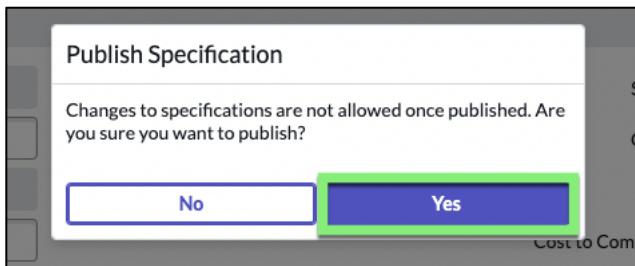
The screenshot shows the 'Specification Relationships' screen. It lists two relationships:

Target Type	Target Specification	Relationship Type	Mandatory	Minimum Quantity	Default Quantity	Maximum Quantity
Service Specification	Internet over Fiber	Requires	true	1	1	1
Service Specification	Internet over Copper	Requires	true	1	1	1

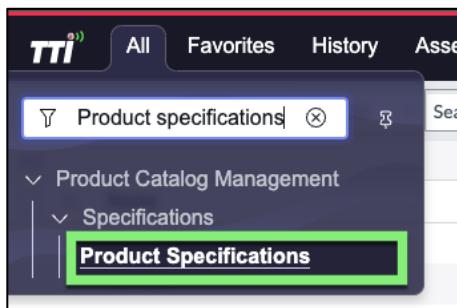
36. Select the **Publish** button to publish the customer-facing **Service Specification**.

The screenshot shows the 'Service Specification - Internet' record in the ServiceNow interface. The 'Publish' button is highlighted in blue at the top right of the form. The form contains fields for Number (SERSP01012), Name (Internet), Version (1), Display Name (Internet), Category (Internet), Type (Customer Facing), Start Date (2022-07-21), End Date (empty), State (Draft), Code (empty), Line (empty), Cost to Company (empty), Composite (checkbox), Installation Required (checkbox), Location Specific (checkbox), Initial Version (Internet), Previous Version (empty), and Description (Internet service that can be delivered by multiple access technologies).

37. On the Publish Specification overlay, select **Yes** to confirm publishing the **Internet Service Specification**.



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



39. Select the **New** button to create a new **Product Specification** record.

Product Specifications							
	Number	Display Name	Version	Category	State	Start Date	End Date
	PRDSP00001	Mobile Plan	1	Mobile Plan	Published	2021-07-05	2026-07-05
	PRDSP00002	SD-WAN Security	1	SD-WAN Security	Published	2022-05-12	2027-06-13
	PRDSP00003	SD-WAN Service Package	1	SD-WAN Service Package	Published	2022-05-14	true
	PRDSP00004	SD-WAN Controller	1	SD-WAN Controller	Published	2022-05-14	false
	PRDSP00005	SD-WAN Edge Device	1	SD-WAN Edge Device	Published	2022-05-14	2027-06-13
	PRDSP01001	SD-WAN Service Package v2	2	SD-WAN Service Package	Draft	2022-05-14	true
	PRDSP01002	Internet	1	Internet	Retired	2022-06-08	false
	PRDSP01003	SD-WAN Service Package v3	3	SD-WAN Service Package	Published	2022-05-14	true
	PRDSP01005	Broadband	1	Broadband	Published	2022-07-19	false

40. Enter the following values for the new **Broadband Product Specification** record.

- Name: **Broadband**
- Display Name: **Broadband**
- Category: **Broadband (new Category with a Model Category of Simple Model Category)**

- Start Date: **current date**
- Description: **Broadband Service**

41. Right-click on the header, select **Save** to save the record and remain on the form.

42. Add the following two **Specification Characteristics** to the **Broadband Product Specification**.

Note: Select the New button to add a **Specification Characteristic** or enter the values directly into the Embedded List.

- Characteristic: **Speed**

- Characteristic Option: **Fast**
- Characteristic: **Speed**
- Characteristic Option: **Slow**

Specification Characteristics (1)			Specification Relationships	Product Offerings	Attribute Mappings	Versions (1)	Compatibility Rules
Characteristic	Characteristic Option	Mandatory					
Speed	Fast	false					
Speed	Slow	false					
<i>Insert a new row...</i>							
1 to 1 of 1							

43. From the **Specifications Relationships** tab, select the **New** button to add a new **Specification Relationship** with the following values.

Specification Characteristics (1) Specification Relationships Product Offerings Attribute Mappings Versions (1) Compatibility Rules						
Target Type	Target Specification	Relationship Type	Mandatory	Minimum Quantity	Default Quantity	Maximum Quantity

- Target Type: **Service Specification**
- Target Specification: **Internet**
- Relationship Type: **Realized as**

Specification Relationship
Broadband - Realized as - Internet

Display Name: <input type="text" value="Broadband - Realized as - Internet"/>	* Relationship Type: <input style="border: 2px solid green;" type="text" value="Realized as"/>
Source Specification: <input type="text" value="Broadband"/>	Minimum Quantity: <input type="text" value="1"/>
Target Type: <input type="text" value="Service Specification"/>	Default Quantity: <input type="text" value="1"/>
Target Specification: <input type="text" value="Internet"/>	Maximum Quantity: <input type="text" value="1"/>
Mandatory: <input checked="" type="checkbox"/>	Quantity Characteristic: <input type="text"/>

44. Select the **Submit** button to save the record.

45. Under the **Attribute Mappings** Related List, select the **New** button to create a new record.

Number	Source Characteristic	Source Characteristic Option	Target Specification	Target Characteristic	Target Characteristic Option

46. Create a new **Attribute Mapping** with the following values.

- Source Characteristic: **Speed**
- Source Characteristic Option: **Fast**
- Target Specification: **Internet**
- Target Characteristic: **Speed**
- Target Characteristic Option: **Fast**

47. Select the **Submit** button to save the record.

48. Create a second **Attribute Mapping** record with the following values.

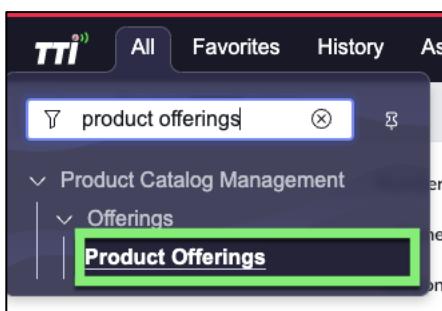
- Source Characteristic: **Speed**
- Source Characteristic Option: **Slow**
- Target Specification: **Internet**
- Target Characteristic: **Speed**
- Target Characteristic Option: **Slow**

The screenshot shows the 'Attribute Mapping' interface for creating a record. It includes fields for Source Specification ('Broadband'), Source Characteristic ('Speed'), Target Specification ('Internet'), Target Characteristic ('Speed'), and Target Characteristic Option ('Slow'). A green box highlights the 'Speed' field in both the source and target sections.

49. Select the **Submit** button to save the record.
50. Select the **Publish** button to publish the **Broadband Product Specification**.

The screenshot shows the 'Product Specification' screen for a 'Broadband' product. It displays various fields like Name, Description, and State (set to Draft). The 'Publish' button is highlighted with a green box.

51. Select the **Yes** button to confirm publishing the **Product Specification** record.
52. Navigate to **All > Product Catalog Management > Offerings > Product Offerings**.



53. Select the **New** button to create a new **Product Offering**.

Product Offerings										
Product Offerings		Number	Search		Actions on selected rows... New					
All	Display Name	Version	Product Specification	Monthly Recurring Charges	Non Recurring Charges	Contract Term	State	Start Date	End Date	
PRDOF00001	Premium Unlimited mobile plan	1	Mobile Plan	\$59.00	\$0.00	12 months	Published	2021-07-04	2026-07-04	
PRDOF00002	All in one mobile plan starting from \$39...	1	Mobile Plan	\$39.00	\$0.00	24 months	Published	2021-07-04	2026-07-04	
PRDOF00003	All in one mobile plan starting from \$49...	1	Mobile Plan	\$49.00	\$0.00	24 months	Published	2021-07-04	2026-07-04	
PRDOF00004	Premium SD-WAN Offering	1	SD-WAN Service Package	\$628.627	\$1,257.2541	12 months	Published	2022-05-13	2027-06-12	
PRDOF00005	SD-WAN Gold Plan	1	SD-WAN Service Package	\$500.00	\$1,000.00	12 months	Published	2021-10-31	2026-11-30	
PRDOF00006	SD-WAN Bronze Plan	1	SD-WAN Service Package	\$628.627	\$1,257.2541	12 months	Published	2021-10-31	2026-11-30	
PRDOF01001	Broadband Offering	1	Broadband	\$0.00	\$0.00	Not Applicable	Published	2022-07-19		

54. Enter the following values.

- Name: **Broadband Offering**
 - Display Name: **Broadband Offering**
 - Product Specification: **Broadband**
 - Monthly Recurring Charges: **30.00**
 - Non Recurring Charges: **50.00**
 - Description: **Generic Broadband Product Offering**
 - Offering Catalog: **Enterprise Mobile Plan**
 - Distribution Channel: **Web**
 - Start Date: **current date**

TTI All Favorites History Asset Workspace Product Offering - Broadband Offering 

Product Offering
Broadband Offering

Number PRDOF01002 State In Draft

* Name **Broadband Offering**

Version 1

* Display Name **Broadband Offering**

* Product Specification **Broadband**

* Contract Term Not Applicable

Monthly Recurring Charges \$ 30.00

Non Recurring Charges \$ 50.00

* Description Generic Broadband Product Offering

* Offering Catalog Enterprise Mobile Plan

* Distribution Channel Web

* Start Date 2022-07-21

End Date

Owner

Initial Version Broadband Offering

Previous Version

Publish Update Copy Delete

55. Right-click on the header and select **Save** to save the record and remain on the current form.

56. View the **Product Offering Characteristics** Embedded List on the **Broadband Offering Product Offering** record.

Product Offering Characteristics (2) Product Visuals Versions (1)									
<input type="checkbox"/> Order <input type="button" value="Search"/> Actions on selected rows... <input type="button" value="New"/>									
Product Offering = Broadband Offering									
Characteristic	Characteristic Option	Specification	Customer Input Required	Monthly Recurring Charges	Non Recurring Charges	Order	Mandatory	Default	
Speed	Fast	Broadband	true	\$0.00	\$0.00	false	false	false	
Speed	Slow	Broadband	true	\$0.00	\$0.00	false	false	false	

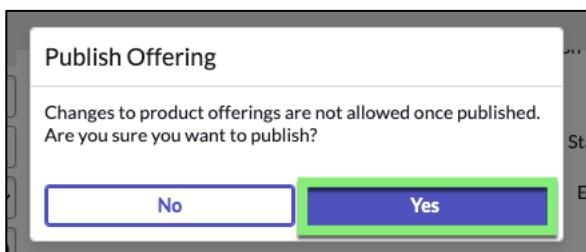
57. Update the **Customer Input Required** and **Mandatory** field values to true for both **Product Offering Characteristic** values.

Note: the **Product Offering Characteristics** are predefined – rolled up from the **Product Specification** record. You usually would restrict characteristics to only those relevant to your offering.

Product Offering Characteristics (2) Product Visuals Versions (1)									
<input type="checkbox"/> Order <input type="button" value="Search"/> Actions on selected rows... <input type="button" value="New"/>									
Product Offering = Broadband Offering									
Characteristic	Characteristic Option	Specification	Customer Input Required	Monthly Recurring Charges	Non Recurring Charges	Order	Mandatory	Default	
Speed	Fast	Broadband	true	\$0.00	\$0.00	false	true	false	
Speed	Slow	Broadband	true	\$0.00	\$0.00	false	true	false	

58. Select the **Publish** button the publish the **Product Offering**.

59. Select the **Yes** option to confirm publishing the **Product Offering**.



60. You have now completed a Product Offering, Product and Service Specification.

Section 2.0 Capture an order for the Broadband Offering

In this section, you will create an order for the broadband offering previously created.

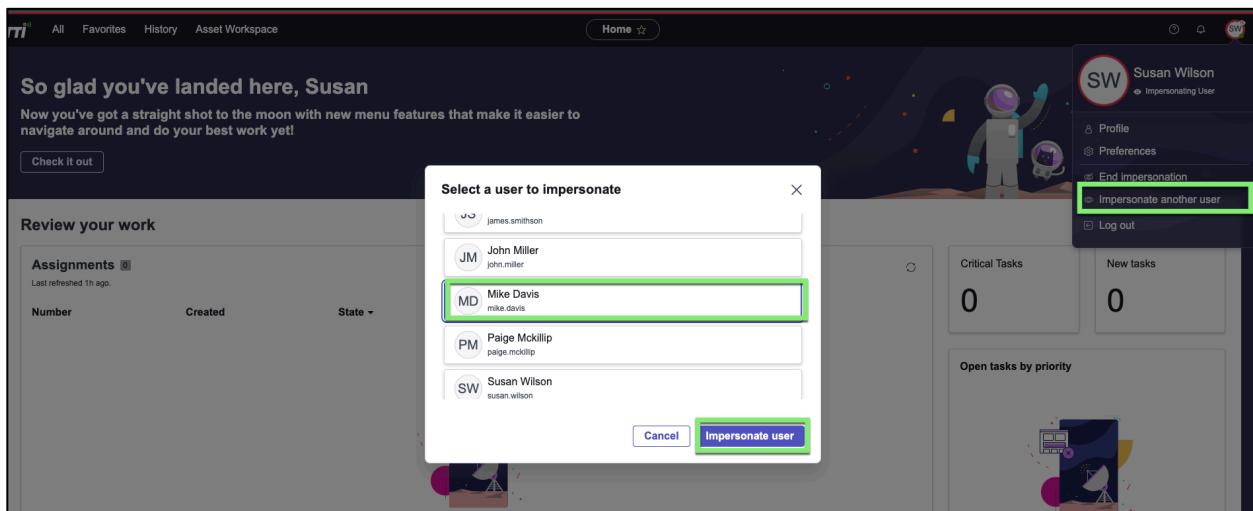
Section 2.1 Plan the Order

As part of Order Capture, ServiceNow OMTMT assumes that the customer, locations, and contacts have been predefined for the customer. In our example, we will use previously created data of:

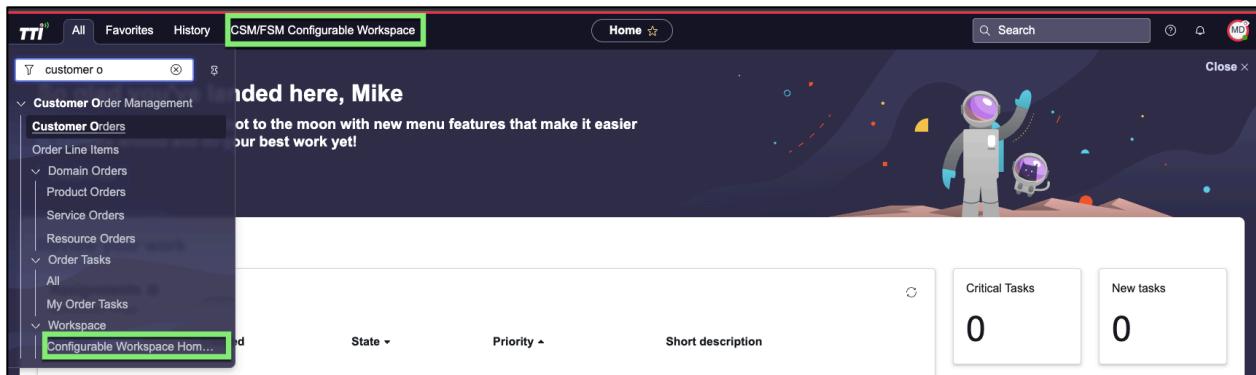
- Customer: **Funco Intl**
- Address: **Dallas Tx**
- Contact: **Sarah Johnson**

Section 2.2 Capture the Order

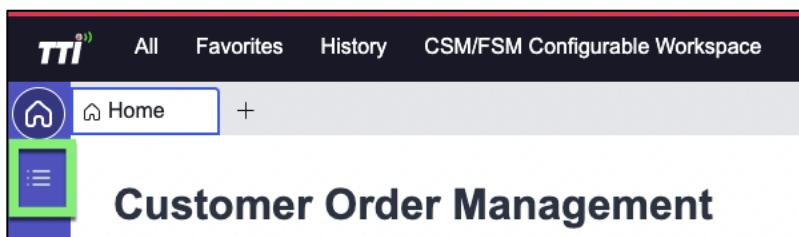
1. Impersonate **Mike Davis**, the Order Fulfillment Manager.



2. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home** or select the **CSM/FSM Configuration Workspace** option in the header bar.



- Select the **List** icon.



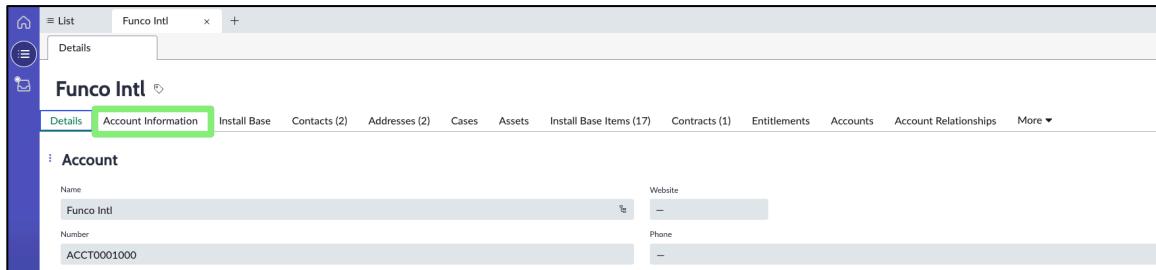
- Navigate to **Customer > Accounts**.
- Select account number **ACCT0001000** for the Funco Intl account.

Note: you may need to scroll to view the **Funco Intl** record.

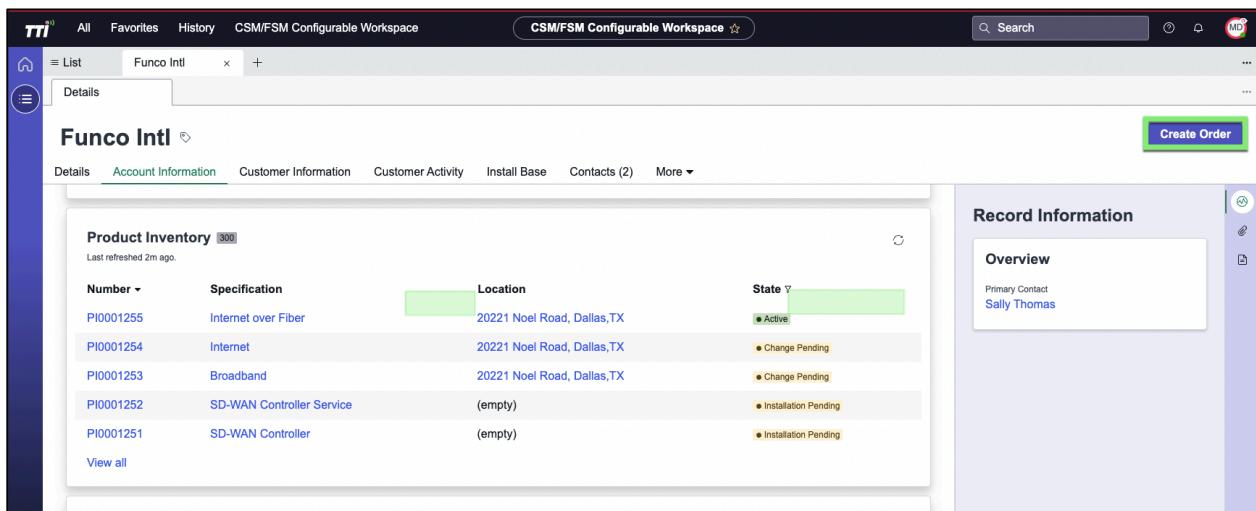
Number	Name	Phone	Primary Contact	City	Zip / Postal code	Updated
ACCT0000008	Tom Tom Networks	(877) 729-4269	Tommy Gore	Santa Clara	87645	2022-05-22 12:38:24
ACCT0000009	Avid Corporation	(877) 729-4269	Linda Cox	Los Altos	94022	2023-12-17 13:57:54
ACCT0000010	In and Out routing	(877) 729-4269	Ingrid Blake	Pomona	46254	2022-05-22 12:38:43
ACCT0000011	Advanced Super Routing	(408) 839-2810	Andrew Chen	Sanat Clara	95070	2022-05-22 12:39:12
ACCT0000012	Cambrian	(580) 555-1017	(empty)	Oklahoma City	73102	2022-05-22 12:39:06
ACCT0000013	Advanced Routing Components	(877) 729-4269	Alex Linde	Pomona	46254	2022-05-22 12:39:21
ACCT0000014	Diagonal Inc.	(248) 323-4313	Denis Koch	Detroit	48219	2022-05-22 12:40:31
ACCT0000015	Elegant Communications	(317) 725-6985	Ronald Hawes	Indianapolis	46254	2023-12-17 13:54:38
ACCT0000016	Unity System	(408) 987-3425	Robert Turner	Las Vegas	87967	2022-05-22 12:39:37
ACCT0000018	KNow Technologies	+1 408 669 3443	(empty)	San Jose	95110	2022-05-22 12:39:42
ACCT0000019	Spark Technologies	(674) 987-9987	Amy Pascal	Las Vegas	987860	2022-05-22 12:39:51
ACCT0001000	Funco Intl	(555) 555-5555	Sally Thomas	Charleston	12345	2022-07-13 11:43:40
ACCT0010000	Boxeo APAC	+917675078657	(empty)	Mumbai	400001	2022-05-21 03:44:12
ACCT0010212	Advances Super Computing	(408) 839-2810	Amy Chen	Santa Clara	95050	2018-08-15 14:01:59

- Select the **Account Information** related list (tab) to view the current orders, inventory, Cases, and install base items for the customer.

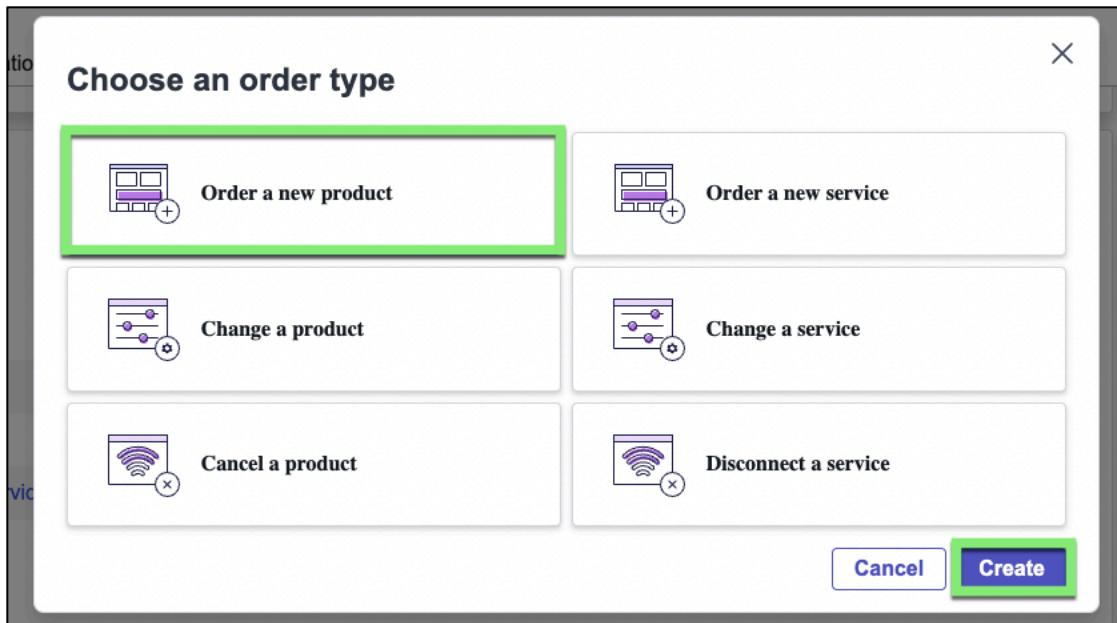
Note: It may take up to 5 minutes for all data to load.



- Select the **Create Order** button.



- Highlight **Order a new product** option and select **Create**.



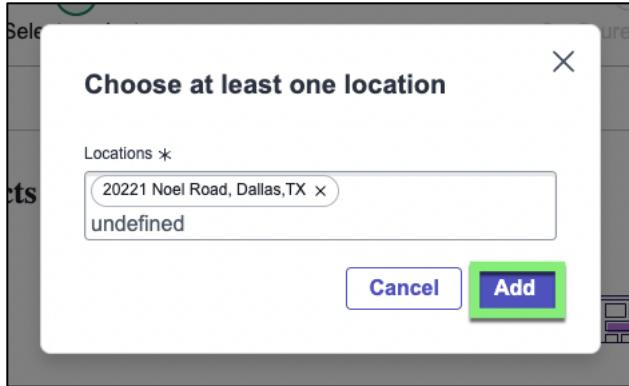
- Select the **Contact** field and choose the contact, **Sarah Johnson**.

Note: The Account field is pre-selected. This is because you started the order creation flow from the account information.

- Select **Continue**.

On the next screen, select locations where products are to be delivered. These are locations/addresses already associated with the selected account.

- Select the **Locations** field and select the **Dallas, TX** location.



12. Select **Add**.

Now you will add contact and product offerings to each location.

13. With the Dallas, Tx location selected, go to the **Select Products** section.

14. Enter the following information for Location Contact:

- **First Name:** **John**
- **Last Name:** **Brown**
- **Email:** **john.brown@funco.test.net**
- **Mobile Number:** **1234567890**

Select Products	
For each location, choose a contact, product, and quantity.	
Location Contact	
First Name John	Last Name Brown
Email john.brown@funco.test.net	Mobile Number 1234567890

15. In the **Offering field**, select the newly created Product Offering **Broadband Offering** and select the **Configure Items** button.

Select Products

For each location, choose a contact, product, and quantity.

Location Contact

First Name	Last Name
John	Brown
Email	Mobile Number
john.brown@funco.test.net	1234567890

Product offerings

Offering *	Quantity
Broadband Offering	1

Add Product Offering

16. On the **Configure Products** page, note that **missing info** is highlighted on the Order Line Items records where additional details are required. Select the **Characteristics** tab to see the missing characteristic values.

New product order

Account: Funco Intl | Contact: Sarah Johnson

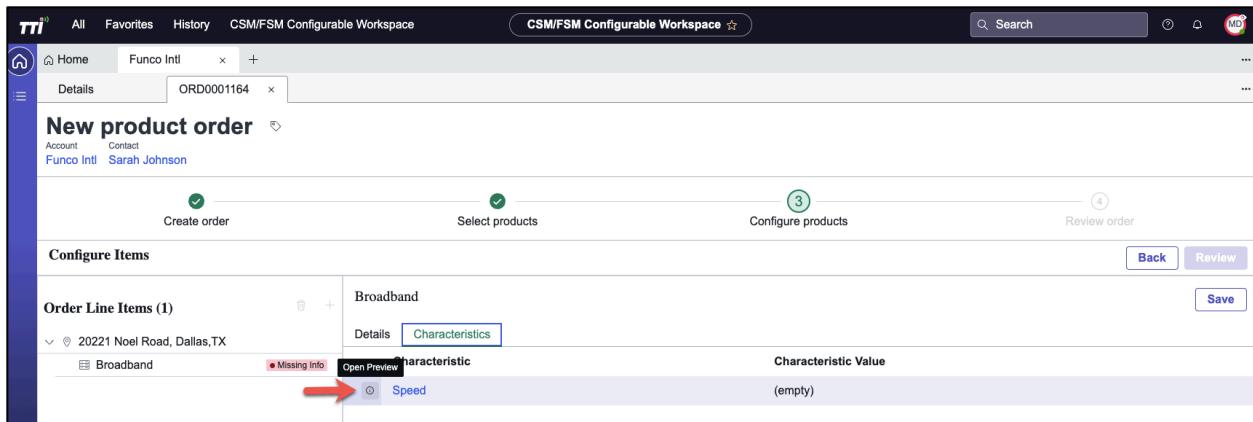
Create order **Select products** **Configure products** **Review order**

Configure Items

Order Line Items (1)	Details	Characteristic	Characteristic Value
20221 Noel Road, Dallas, TX	Broadband	Speed	(empty)

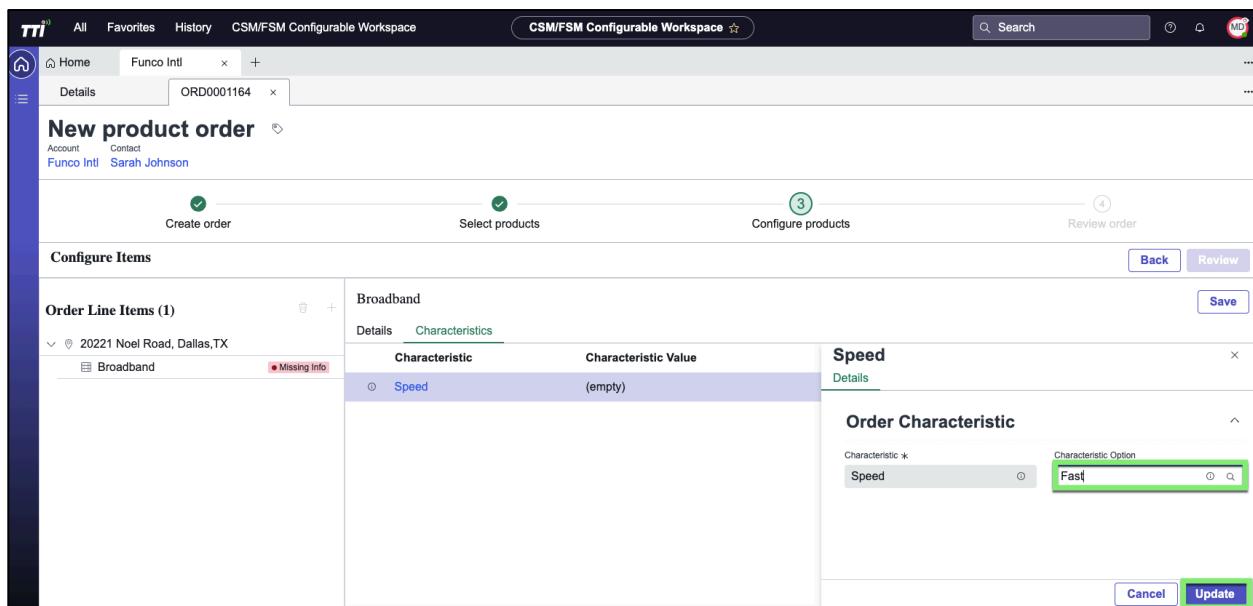
Missing Info

17. The **Speed** characteristic needs to be set; hover your mouse to the left of the characteristic **Speed** and select the 'i' icon.



The screenshot shows the 'New product order' screen in the CSM/FSM Configurable Workspace. The 'Characteristics' tab is selected. Under 'Order Line Items (1)', there is one item: 'Broadband'. The 'Characteristic' column for this item shows 'Speed'. A red arrow points to the 'Speed' entry in this column.

18. Select the **Fast** option for the **Speed** characteristic and select **Update**.



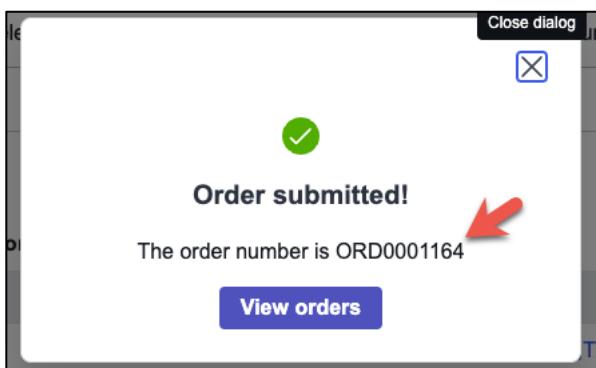
The screenshot shows the 'New product order' screen after selecting 'Fast' for the Speed characteristic. The 'Characteristic Value' column for 'Speed' now displays 'Fast'. The 'Update' button is highlighted in green at the bottom right of the modal.

19. Select the **Review** button to move to the **Order Summary** page.

20. Select the **Submit** button to create the order.

Number	Product Offering	Product Specification	Ordered Quantity	Location	Monthly Recurring Charges Per Unit	Non Recurring Charges Per Unit
ORDL0001131	Broadband Offering	Broadband	1	20221 Noel Road, Dallas, TX	\$30.00	\$50.00

21. Note the **Order Number** value returned to you.



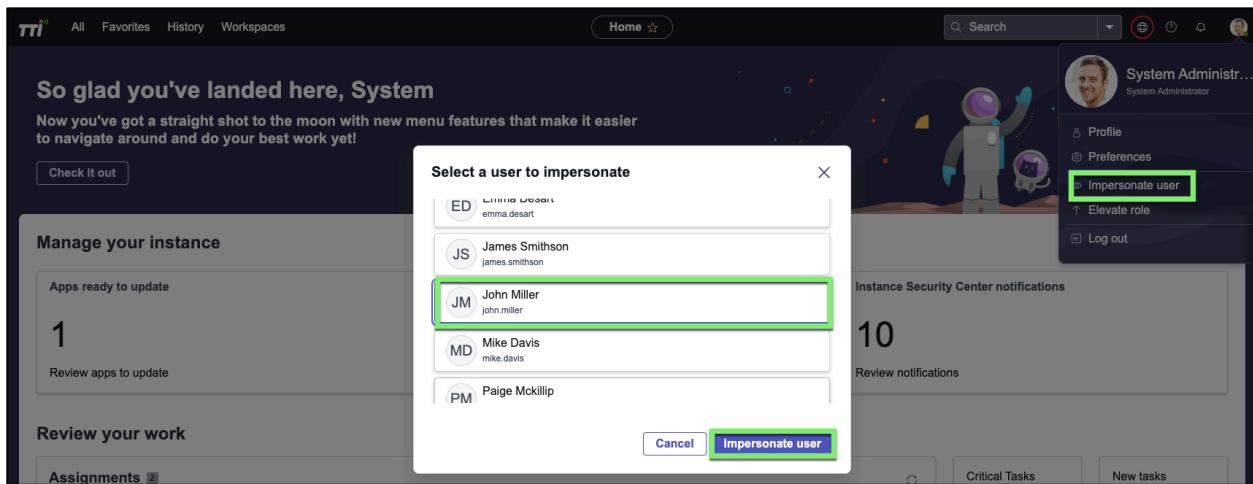
Section 3.0 View and Fulfill the Order

In this section, you will create an order for the broadband offering previously created.

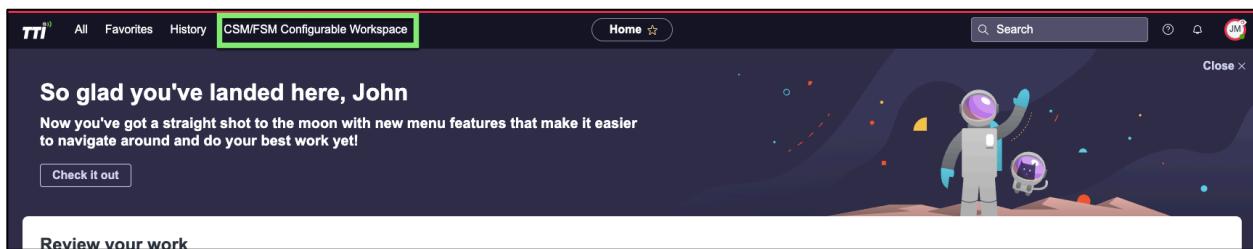
Section 3.1 View the Order

We are now ready to review the order.

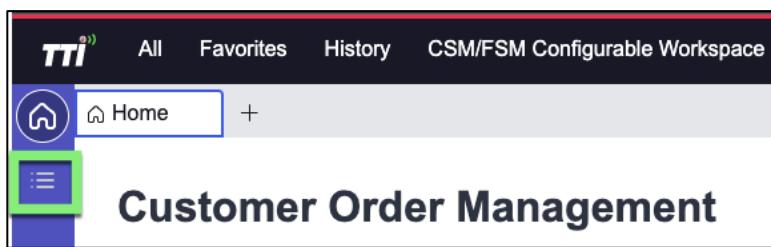
1. Impersonate **John Miller**, the Order Fulfillment Agent.



2. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home** or select the **CSM/FSM Configuration Workspace** option in the header bar.



3. Select the **List** option.



4. Select **Customer >> Accounts** and choose the **Funco Intl** account record (**ACCT001000**).

Note: you may need to scroll to view the **Funco Intl** account record.

Number	Name	Phone	Primary Contact	City	Zip / Postal code	Updated
ACCT0000009	Avid Corporation	(877) 729-4269	Linda Cox	Los Altos	94022	2023-12-17 13:57:54
ACCT0000015	Elegant Communications	(317) 725-6985	Ronald Hawes	Indianapolis	46254	2023-12-17 13:54:38
ACCT0001000	Funco Intl	(555) 555-5555	Sally Thomas	Charleston	12345	2022-07-13 11:43:40
ACCT0000014	Diagonal Inc.	(248) 323-4313	Denis Koch	Detroit	48219	2022-05-22 12:40:31
ACCT0000019	Spark Technologies	(674) 987-9987	Amy Pascal	Las Vegas	987860	2022-05-22 12:39:51
ACCT0000018	KNow Technologies	+1 408 669 3443	(empty)	San Jose	95110	2022-05-22 12:39:42
ACCT0000016	Unity System	(408) 987-3425	Robert Turner	Las Vegas	87967	2022-05-22 12:39:37
ACCT0000013	Advanced Routing Components	(877) 729-4269	Alex Linde	Pomona	46254	2022-05-22 12:39:21
ACCT0000011	Advanced Super Routing	(408) 839-2810	Andrew Chen	Sanat Clara	95070	2022-05-22 12:39:12
ACCT0000012	Cambrian	(580) 555-1017	(empty)	Oklahoma City	73102	2022-05-22 12:39:06
ACCT0000010	In and Out routing	(877) 729-4269	Ingrid Blake	Pomona	46254	2022-05-22 12:38:43
ACCT0000008	Tom Tom Networks	(877) 729-4269	Tommy Gore	Santa Clara	87645	2022-05-22 12:38:24
ACCT0000006	Boxeo Germany	+49 69 94592555	Marta Hoch	Frankfurt	60389	2022-05-22 12:38:19
ACCT0000005	Boxeo France	+33 1 46 66 33 66	Thomas Pfeifer	Fresnes	94260	2022-05-22 12:38:11

5. Select the **Account Information** tab to view customer order records.

Customer Summary	Record Information
Account  Funco Intl Customer ACCT001000 Phone (555) 555-5555 Street 219 Summer St. Primary Contact Sally Thomas State SC Zip/Postal Code 12345	Record Information Overview Primary Contact Sally Thomas
Contracts Enterprise Mobile Plan Contract for Funco Intl Active CNTR0000002 Beth Anglin Till 2024-07-06 View all	

6. Scroll to view the **Overview >> Customer Orders** widget. Select the order created in **Section 2, step #21** above.

The screenshot shows the ServiceNow interface for the CSM/FSM Configurable Workspace. In the center, there is a list titled "Customer Orders" with 72 items. One item, "ORD0001164", is highlighted with a green border. The list includes columns for Number, Order Type, Contact, and State. To the right, a "Record Information" panel is open, showing an "Overview" section with "Primary Contact Sally Thomas".

7. Select the **Order Line Items** tab to view the order line details.

The screenshot shows the ServiceNow interface for the CSM/FSM Configurable Workspace. The "Order Line Items" tab is selected for the order "ORD0001163". On the left, the "Customer Order" details are shown, including the number "ORD0001164", account "Funco Intl", contact "Sarah Johnson", and order date "2022-07-21 16:31:43". On the right, the "Activity" and "Record Information" panels are visible. The "Activity" panel shows a comment from "Mike Davis" and field changes. The "Record Information" panel shows an "Overview" section with "Account Funco Intl" and "Contact Sarah Johnson".

8. Select the **Order Line** number.

ORD0001163

Order Line Items (1)

Number	Product Specification	Location	Ordered Quantity	Order Line Action	State	Parent Line Item
ORDL0001131	Broadband	20221 Noel Road, Dallas,TX	1	Add	New	(empty)

Record Information

Overview

Account: Funco Intl
Contact: Sarah Johnson

9. Select the **Order Characteristics** tab.

Note: the **Speed** characteristic is set to **Fast**.

ORDL0001131

Order Characteristics (1)

Number	Specification	Characteristic	Previous Characteristic Value	Characteristic Value	Characteristic Option
ORC000001520	Broadband	Speed		Fast	Fast

Record Information

Overview

Account: Funco Intl
Contact: Sarah Johnson

10. Select the **Order Line Item Contacts** tab.

Note: the contact supplied, **John Brown**, is displayed.

ORDL0001131

Order Line Item Contacts (1)

First Name	Last Name	Business Phone	Email
John	Brown	1234567890	john.brown@funco.test.net

Record Information

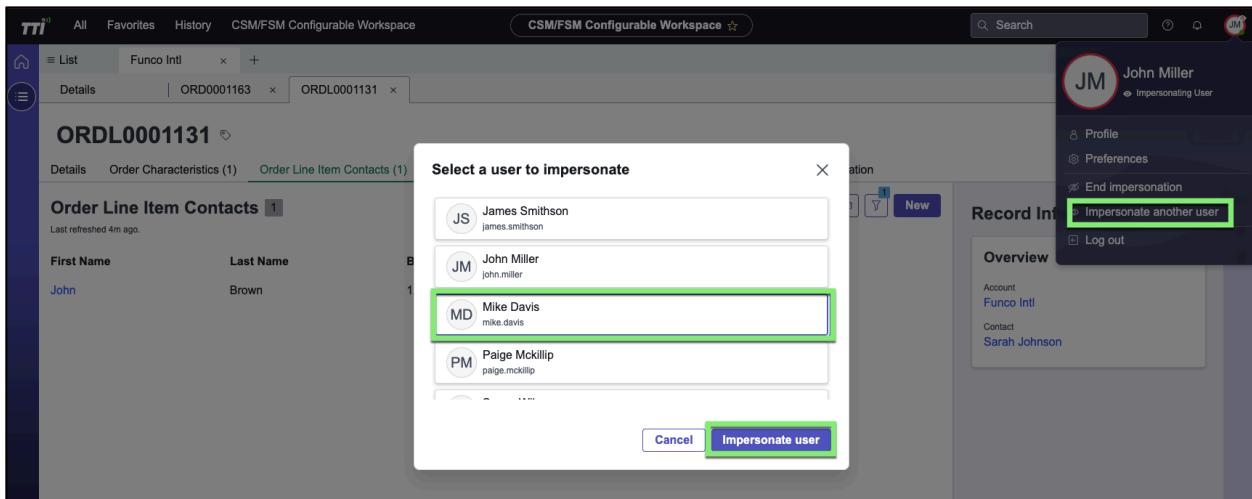
Overview

Account: Funco Intl
Contact: Sarah Johnson

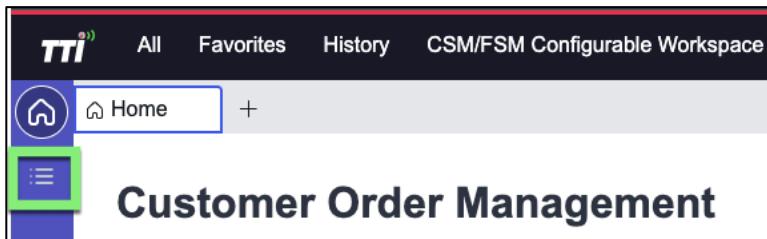
11. The remaining tabs: **Order Line Related Items**, **Product Orders**, **Order Tasks**, and **Order Decomposition** are not populated.

Section 3.2 Approve and Complete the Order

1. Impersonate **Mike Davis**, the Order Fulfilment Manager.



2. Navigate to **All > Customer Order Management > Workspace > Configurable Workspace Home** or select the **CSM/FSM Configuration Workspace** option in the header bar.
3. Select the **List** option.



4. Select the **Customer Orders >> All** option to view all customer order records.

Number	Account	Contact	Order Type	State	Monthly Recurring Charges	Non Recurring Charges
ORD0000004	Funco Intl	Sally Thomas	Product	Completed	\$49.8797	\$6.235
ORD0001164	Funco Intl	Sarah Johnson	Product	New	\$30.00	\$50.00
ORD0001162	Funco Intl	Sarah Johnson	Product	In Progress	\$0.00	\$0.00
ORD0001160	Funco Intl	Sarah Johnson	Product	Draft	\$0.00	\$0.00
ORD0001158	Funco Intl	Sarah Johnson	Product	Draft	\$0.00	\$0.00
ORD0001156	Funco Intl	Sarah Johnson	Product	Draft	\$550.00	\$1,000.00
ORD0001154	Funco Intl	Sarah Johnson	Product	Completed	\$0.00	\$0.00
ORD0001150	Funco Intl	Sarah Johnson	Product	Draft	\$628.627	\$1,257.2541
ORD0001148	Funco Intl	Sarah Johnson	Product	Draft	\$0.00	\$0.00
ORD0001146	Boxeo Germany	Marta Hoch	Service	Draft	\$0.00	\$0.00
ORD0001144	Boxeo Germany	Marta Hoch	Product	Draft	\$0.00	\$0.00
ORD0001142	Funco Intl	Sally Thomas	Product	Draft	\$0.00	\$0.00
ORD0001140	Funco Intl	Sally Thomas	Product	Draft	\$0.00	\$0.00
ORD0001138	Advanced Routing Components	Alex Linde	Product	Draft	\$0.00	\$0.00

5. Choose the order created in **Section 2, step #21** above.
6. Select the **Approve** button to approve the order and trigger order decomposition.

Note: the order moves to a state of **Acknowledged** and then to a state of **In Progress**.

ORD0001163

Customer Order

Number: ORD0001164	Order Type: Product
Account: Funco Intl	State: New
Contact: Sarah Johnson	Fulfillment Type: Deliver
Order Date: 2022-07-21 16:31:43	Version: 1
PONR:	Revision Operation: None

Pricing

Non Recurring Charges	Contract
-----------------------	----------

Compose

Type your Comments here

Everyone can see this comment

Post Comments

Activity

Mike Davis Field Changes • 2022-07-22 06:12:54
State **New** was **Draft**

Mike Davis Field Changes • 2022-07-21 13:49:16
Monthly Recur... \$30.00 was \$0.00
Non Recurring... \$50.00 was \$0.00

Record Information

Overview

Account: Funco Intl
Contact: Sarah Johnson

Customer Order

Number	ORD0001164	Order Type *	Product
Account	Funco Intl	State	In Progress
Contact	Sarah Johnson	System has modified this field value	
Order Date	2022-07-21 16:31:43	Fulfillment Type *	Deliver
PONR		Version	1
		Revision Operation	None

Pricing

Non Recurring Charges	Contract
-----------------------	----------

Compose
Type your Comments here
Everyone can see this comment Post Comments

Activity

- System Field Changes - 2022-07-22 07:01:52 State In Progress was Acknowledged
- Mike Davis Field Changes - 2022-07-22 07:01:51 State Acknowledged was New
- Mike Davis Field Changes - 2022-07-22 06:12:54

Record Information

Overview
Account Funco Intl
Contact Sarah Johnson

- Select the **Order Line Items** tab and then select the order line number.

Order Line Items 1

Number	Product Specification	Location	Ordered Quantity	Order Line Action	State	Parent
ORDL0001131	Broadband	20221 Noel Road, Dallas, TX	1	Add	In Progress	(empty)

Record Information

Overview
Account Funco Intl
Contact Sarah Johnson

- There is now one **Product Order**, and three **Order Task** records present.

The screenshot shows the ServiceNow interface for a specific order record. At the top, there's a navigation bar with 'All', 'Favorites', 'History', 'CSM/FSM Configurable Workspace', and a search bar. Below the navigation is a breadcrumb trail: 'List' → 'ORD0001163' → 'ORDL0001131'. The main content area is titled 'ORDL0001131'. It contains tabs for 'Details', 'Order Characteristics (2)', 'Order Line Item Contacts (1)', 'Order Line Related Items', 'Product Orders (1)' (which is highlighted with a green box), 'Order Tasks (3)' (also highlighted with a green box), and 'Order Orchestration'. The 'Order Line Item' section displays various fields like Number (ORDL0001131), Order Type (Product), State (In Progress), and Location (20221 Noel Road, Dallas, TX). To the right, there are sections for 'Compose' (Comments and Work notes), 'Activity' (with entries from System and Mike Davis), and 'Record Information' (Overview, Account, Contact). A 'Save' button is located in the top right corner.

9. Select the **Order Tasks** tab.

Note: the tasks tab shows each of the 'domain orders' for the entities. This order contained product 'Broadband' – and there is a product order to fulfill it, but there is also a 'service Order' for Internet and a second 'Service Order' for 'Internet over Fiber,' which was created because of characteristic 'speed' was set to 'fast.' (per our service specification – we created 'internet over fiber' if the speed was 'fast').

Note: You can use the Order Orchestration tab to view the task records related to the order.

This screenshot shows the same order record as the previous one, but the 'Order Tasks (3)' tab is now selected. The interface displays a table of tasks with columns for Number, Short description, Priority, State, Assignment group, and Assigned to. There are three tasks listed: 'PO0001071' (Product Order for Broadband), 'SO0001074' (Service Order for Internet), and 'SO0001075' (Service Order for Internet over Fiber). The 'Record Information' panel on the right remains the same. A 'Save' button is visible in the top right.

10. Open the **Service Order for Internet over Fiber** service order record, change the state from **Draft** to **Closed Completed**, and select the **Save** button.

The screenshot shows the ServiceNow interface for a Service Order. The main title is "Service Order for Internet over Fiber". The "Service Order" tab is selected. In the "State" dropdown, "Closed Complete" is selected and highlighted with a green border. At the top right, there are buttons for "Assign to me", "Close", and "Save". The "Save" button is highlighted with a green border. The "Activity" and "Attachments" panels are also visible.

11. Open the **Service Order for Internet** service order, change the state from **Draft** to **Closed Complete**, and select the **Save** button.

Note: you may need to select the order line number tab to view the service order record.

The screenshot shows the ServiceNow interface for a Product Order. The main title is "Service Order for Internet". The "Service Order" tab is selected. In the "State" dropdown, "Draft" is selected and highlighted with a green border. At the top right, there are buttons for "Assign to me", "Close", and "Save". The "Save" button is highlighted with a green border. The "Activity" and "Attachments" panels are also visible.

12. Open the **Product Order for Broadband** product order, change the state from **Draft** to **Closed Complete**, and select the **Save** button.

Note: you may need to select the order line number tab to view the product order record.

This screenshot shows the ServiceNow CSM/FSM Configurable Workspace interface. A Product Order for Broadband is displayed. The Order Line Item tab is active, showing three tasks in state 'Closed Complete'. The Activity panel shows a system field change event. The Attachments panel indicates no attachments available.

13. Return to the **Order Line Item** tab and observe all tasks are in a state of **Closed Complete**.

Note: you may need to refresh the list to see the state change.

This screenshot shows the Order Tasks tab for ORDL0001131. Three tasks are listed, all in state 'Closed Complete'. The Record Information panel on the right shows account and contact details.

14. Return to the **Order Line** details tab (select refresh -) , and all tasks and domain orders are complete, the order line state is set to **Completed**.

This screenshot shows the Order Line Item tab for ORDL0001131. The State dropdown is set to 'Completed'. The Record Information panel on the right shows account and contact details.

15. Return to the **Order Details** tab and see that since all line items are complete, the order is, the order state is set to **Completed**.

The screenshot shows the ServiceNow interface for a customer order. The main pane displays the 'Customer Order' details, including the number (ORD0001164), account (Funco Intl), contact (Sarah Johnson), and order date (2022-07-21 16:31:43). The status is set to 'Completed'. The 'Activity' panel on the right tracks system and user interactions, such as 'Field Changes' and 'Acknowledgment' events.

Section 3.3 Review Product Inventory for the Order

We now want to see the product inventory created for this customer order.

1. Navigate to the **Order Detail View** and select the **Order Line Items** tab.

The screenshot shows the 'Order Line Items' tab selected. It lists one item: ORDL0001131, which is a 'Broadband' product located at '20221 Noel Road, Dallas, TX'. The item has been ordered once ('Ordered Quantity 1') and is in the 'Completed' state. The 'Record Information' panel on the right provides an overview of the account and contact details.

2. Select the **Order Line** record.

The screenshot shows the 'Order Line Items' view for the specific line item ORDL0001131. The 'Number' field is highlighted. The 'Record Information' panel on the right shows the account (Funco Intl) and contact (Sarah Johnson) details.

3. Select the **Product Orders** tab and select the **Product Order for Broadband** record.

The top screenshot shows the 'Child Product Inventory' tab selected, displaying a single record for 'Internet PI0001257'. The bottom screenshot shows the 'Product Orders' tab selected, displaying a single record for 'PO0001071' with the label 'Product Order for Broadband'.

4. Select the **Product Inventory** record and open the reference field using the reference icon.

The screenshot shows the 'Product Order for Broadband' record with its details. In the 'Product Inventory' field, a reference to 'Broadband PI0001256' is visible, which is highlighted in green. The 'Activity' panel on the right shows several system and user activity logs.

5. The product Inventory record for **Broadband PI000#####** was assigned automatically. Select the Child Product Inventory tab to see the record for **Internet PI000#####**, and upon selecting Internet record, the record for **Internet over Fiber** is visible.

Internet PI0001257

Product Inventory		Activity		Attachments	
Name *	Internet PI0001257	System	Field Changes • 2022-07-22 07:34:48		
Specification *	Funco Intl	Location	20221 Noel Road, Dallas,TX was Empty		
Internet	Sarah Johnson	State	Active was Installation-Pending		
Active	Broadband Offering	System	Field Changes • 2022-07-22 07:34:47		
20221 Noel Road, Dallas,TX	Internet PRD00001006	Product Model	Internet PRD00001006 was Empty		
Broadband PI0001256		System	Field Changes • 2022-07-22 07:01:54		
		Parent Product	Broadband PI0001256		
		Contact	Sarah Johnson		
		Specification	Internet		
		Account	Funco Intl		
Activities					

Child Product Inventory (1)		Attachments	
Name	Internet over Fiber PI0001258		
Product Model	Internet over Fiber PRD00001003		
Account	Funco Intl		
Contact	Sarah Johnson		
State	Active		

The screenshot shows a ServiceNow interface for the 'Internet over Fiber PI0001258' record. The 'Name' field is highlighted with a green border. The 'Activity' and 'Attachments' panels are visible on the right side.

Section 4.0 Capture Order to change the Speed

This section will capture an order for the previously created broadband offering.

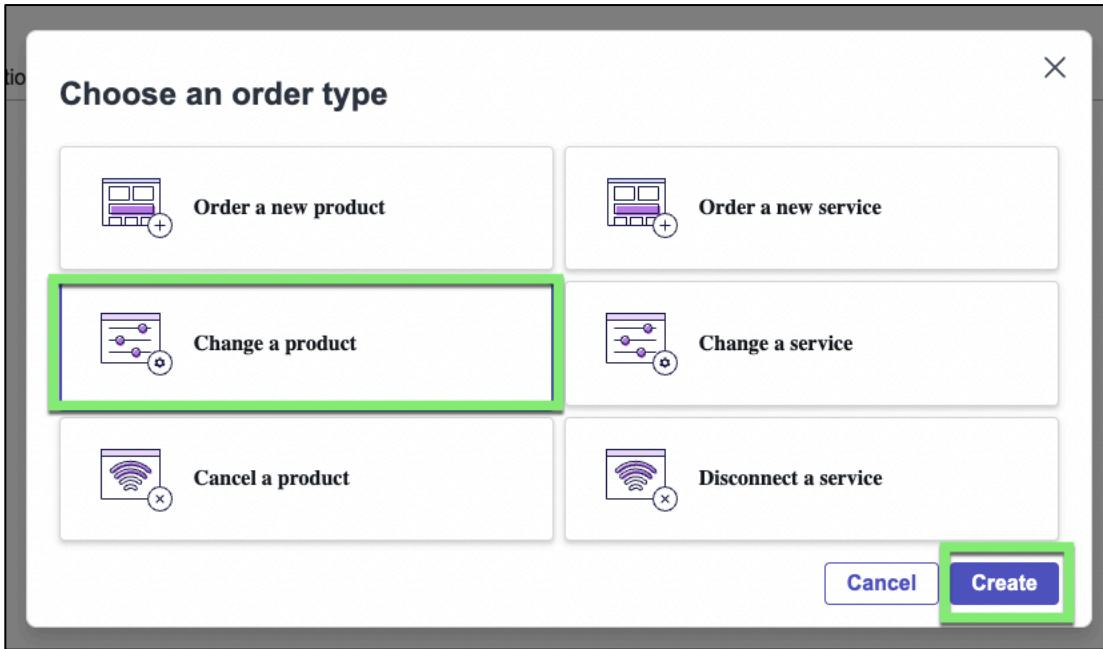
Section 4.1 Create the Order to change the speed

1. Navigate to the **Funco Intl** account record and select the **Create Order** button.

Note: see Section 3.1, steps 3 and 4 for instructions.

The screenshot shows the 'Funco Intl' account record. The 'Create Order' button is highlighted with a green border. The 'Record Information' panel is visible on the right side.

2. Select the **Change a Product** option and select the **Create** button.



- Select **Sarah Johnson** for the **Contact** field and press the **Continue** button.

- Press the **Select** button and then select the **Configure** button to make updates to the **Broadband** product.

Note: : you may need to filter the list of product orders if multiple orders are displayed.

Change product order

Account: Funco Intl Contact: Sarah Johnson

① Create order ② Select products ③ Configure products ④ Review order

Select product inventory for change

Filters

- Location: 20221 Noel Road, Dallas, TX
- Product Offering: Broadband PI0001256
- Product Specification:
- Add characteristics:

Select All

Broadband PI0001256

Product Inventory

Name *	Account *
Broadband PI0001256	Funco Intl
Specification *	Contact
Broadband	Sarah Johnson
State	Product Offering
Active	Broadband Offering
Location	Product Model *
20221 Noel Road, Dallas, TX	Broadband PI0001256

Select

Back **Reset** **Configure (0)**

Change product order

Account: Funco Intl Contact: Sarah Johnson

① Create order ② Select products ③ Configure products ④ Review order

Select product inventory for change

Filters

- Location: 20221 Noel Road, Dallas, TX
- Product Offering: Broadband PI0001256
- Product Specification:
- Add characteristics:

Select All

Broadband PI0001256

Product Inventory

Name *	Account *
Broadband PI0001256	Funco Intl
Specification *	Contact
Broadband	Sarah Johnson
State	Product Offering
Active	Broadband Offering
Location	Product Model *
20221 Noel Road, Dallas, TX	Broadband PI0001256

Unselect

Back **Reset** **Configure (1)**

5. Select the **Characteristics** tab.

The screenshot shows the 'Change product order' screen in the CSM/FSM Configurable Workspace. The 'Characteristics' tab is selected. A green box highlights the 'Speed' characteristic record, which has a value of 'Fast'.

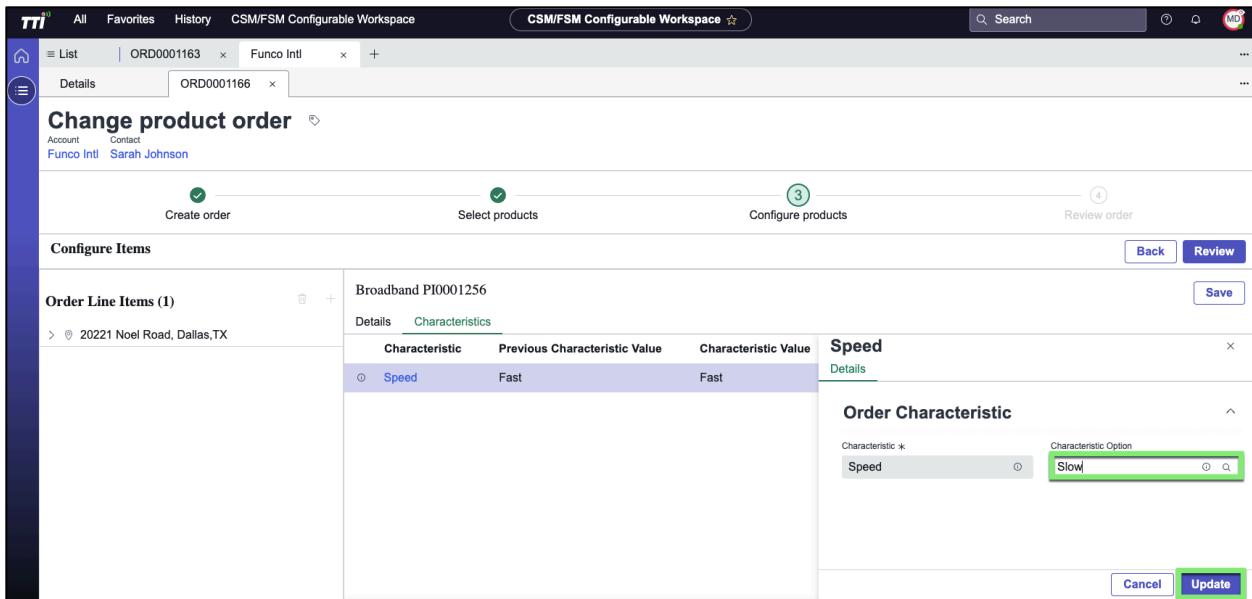
Characteristic	Previous Characteristic Value	Characteristic Value
Speed	Fast	Fast

- Open the **Speed** characteristic record by using the reference icon to the left.

The screenshot shows the 'Change product order' screen in the CSM/FSM Configurable Workspace. The 'Characteristics' tab is selected. A green box highlights the 'Speed' characteristic record, which has been updated to 'Slow'.

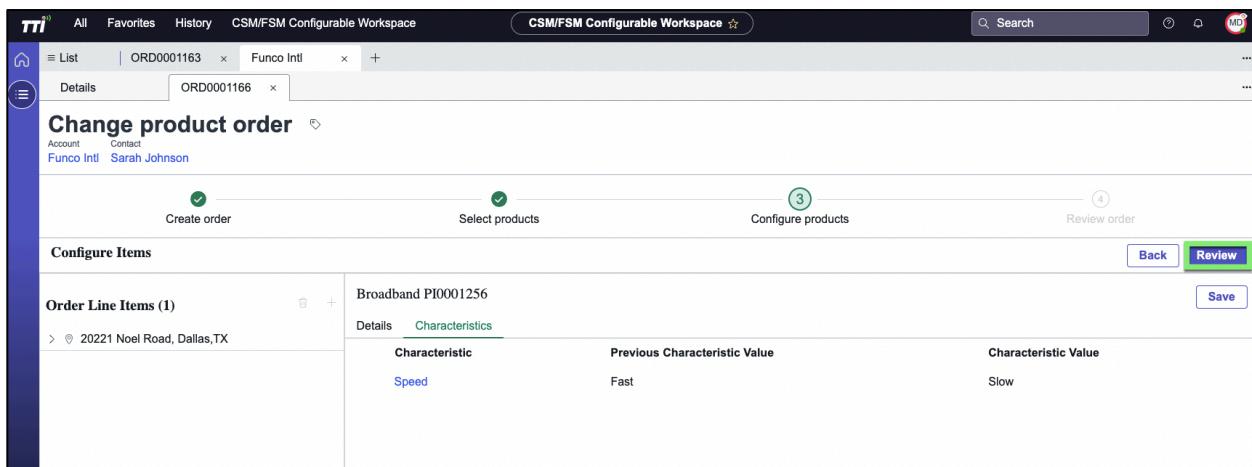
Characteristic	Previous Characteristic Value	Characteristic Value
Speed	Fast	Slow

- Update the characteristic value from **Fast** to **Slow** and select the **Update** button.



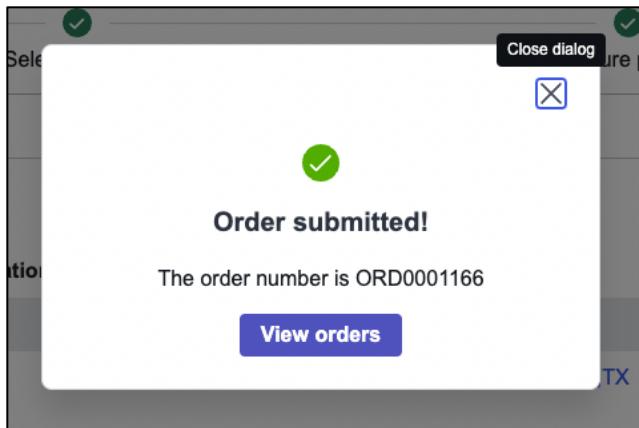
The screenshot shows the 'Change product order' screen. At the top, there are four main steps: 'Create order', 'Select products', 'Configure products' (which is currently active), and 'Review order'. Below these steps, the 'Configure Items' section is visible. Under 'Order Line Items (1)', it lists 'Broadband PI0001256' with the address '20221 Noel Road, Dallas, TX'. In the 'Characteristics' tab, there is a table with one row. The first column is 'Characteristic' (Speed), the second is 'Previous Characteristic Value' (Fast), and the third is 'Characteristic Value' (Speed). A dropdown menu for 'Characteristic Option' shows 'Slow' selected. At the bottom right of the screen are 'Back', 'Review', 'Save', 'Cancel', and 'Update' buttons.

- Select the **Review** Button.



This screenshot shows the same 'Change product order' screen after the 'Review' button was clicked. The 'Characteristic Value' for 'Speed' is now listed as 'Slow'. The rest of the interface remains the same, with the 'Review' button still highlighted.

- Select the **Submit** button to complete the order.



Section 4.2 Approve and Complete the Order

- Approve and complete the order as described in [Section 3.2](#).

Note: when completing the **Order Task** records, you may experience an **Order Fallout**. You can find **Order Fallout** records attached to the Order record. You will need to close and complete these **Order Fallouts** prior to completing the order.

You will need to impersonate user **Emma Desart**, Fallout Manager, to complete the Fallout tasks. The Fallout can occur if the order tasks are not closed in the correct order.

Number	Fallout Type	Short description	State	Related order task	Order Line Item
PO0001002	(empty)	Order Auto Closure Failure	Closed Complete	PO0001003	Order Line Item: ORDL0001003

Order Auto Closure Failure

Details

Fallout

- Number: FO0001002
- State: Closed Complete
- Fallout Type: (Empty)
- Priority: 4 - Low
- Related order task: PO0001003
- Assignment group: Fallout Agents
- Order Line Item: ORDL0001003
- Assigned to:
- Short description: Order Auto Closure Failure
- Work notes (Private):

Compose

Type your Work notes (Private) here

Activity

- Mike Davis: Field Changes • 2022-08-17 13:55:53
- Actual end 2022-08-17 13:55:53 was Empty
- State: Closed Complete was Open
- System: Work notes • 2022-08-17 13:55:02
- The following child orders have not been closed
- ORDL0001003 - (SO0001004)
- System: Work notes • 2022-08-17 13:55:02

Attachments

No Attachments Available

Browse

Section 4.3 Review Product Inventory for the Order

- Review Product Inventory as described in [Section 4.3](#).

Congratulations! You have completed this lab.