

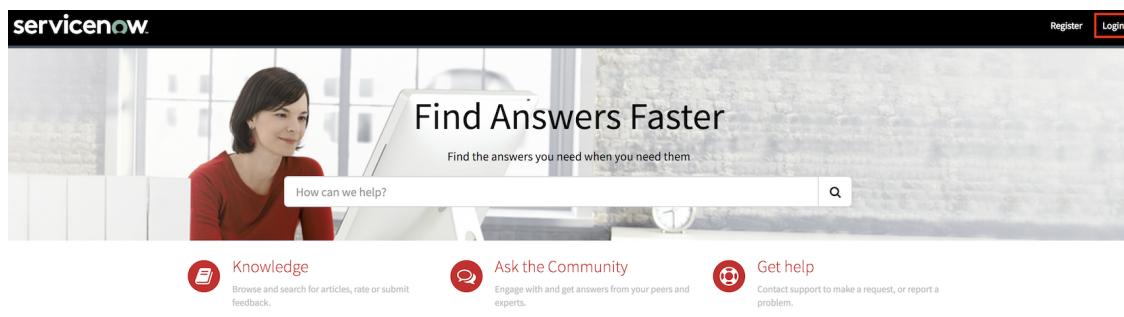
Empower agents to solve customer issues faster with machine learning

Exercise 1: Agent Intelligence for Case Classification

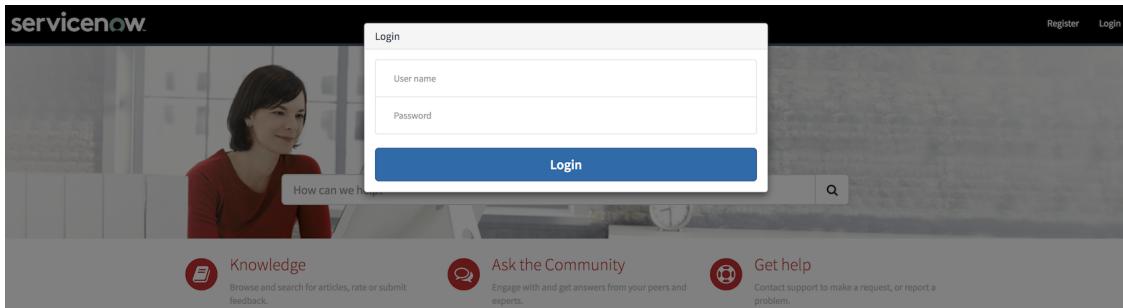
Exercise Goal

Experience first hand how Agent Intelligence automatically categorizes, prioritizes, and assigns cases.

1. **Get Ready:** Know your lab instance URL and login credentials. In this first exercise, you will login first as a customer and then as a customer service agent.
2. **Scenario:** Julie Lewis works for Boxeo a customer of ACME, a provider of analytics software. Julie is having trouble with email notifications from her analytics suite. She decides to log a case.
3. **Navigate to the CSM Customer Portal:** Navigate to the CSM Customer Portal. **Note:** For quicker access, append /csm to your servicenow instance URL.



- 4. Login to Customer Portal:** Login as Julie Lewis (julie.lewis / Welcome1!). Julie is a customer contact since she works for an external company (Boxeo).

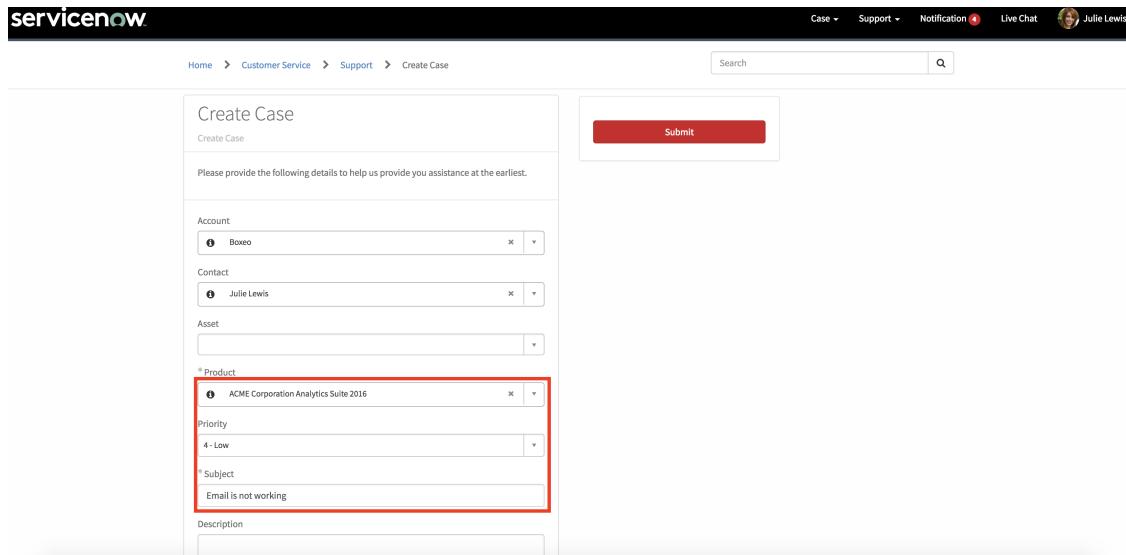


- 5. Create a Case:** Click on Case. Then click on "Create Product Case".



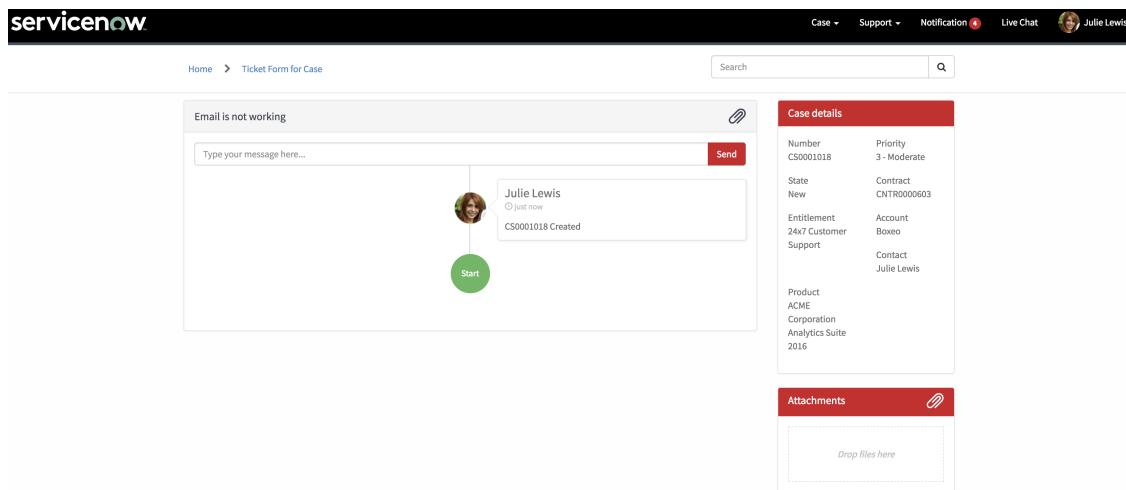
6. Submit Case: Enter the following values: Products - select Acme Analytics Suite 2016. Subject - "Email is not working". Note that the default priority of the case is Low (do not change it). Click Submit.

Note: It is important to use this text as the machine learning model has been trained using similar data.



The screenshot shows the 'Create Case' page in ServiceNow. The 'Product' field is highlighted with a red box. The 'Subject' field contains 'Email is not working'.

7. View Case Details: View the details of the case just created.

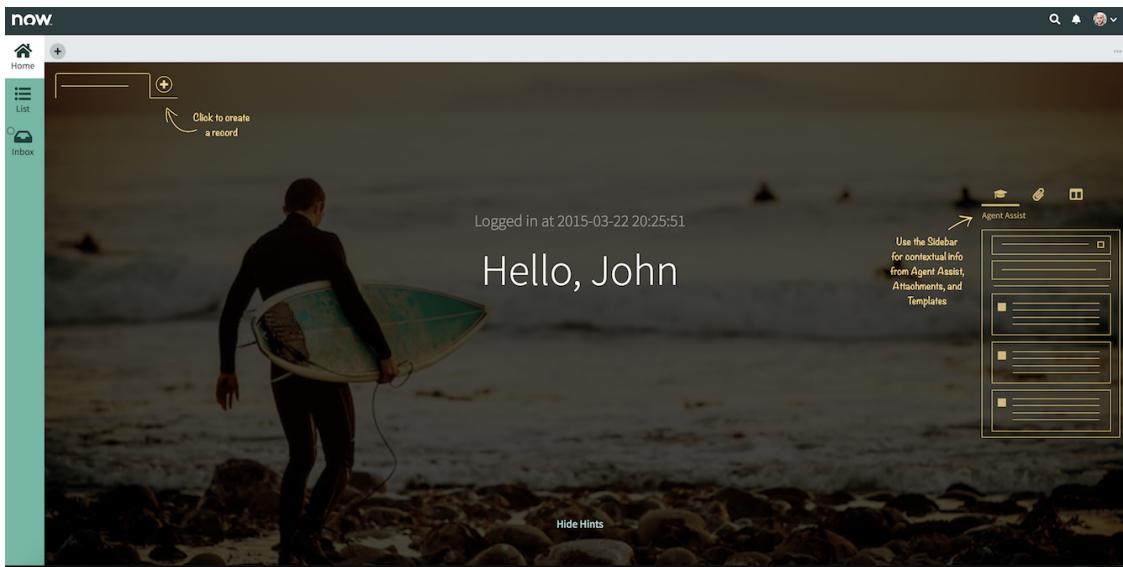


The screenshot shows the 'Ticket Form for Case' page in ServiceNow. The subject is 'Email is not working'. The 'Case details' table includes the following information:

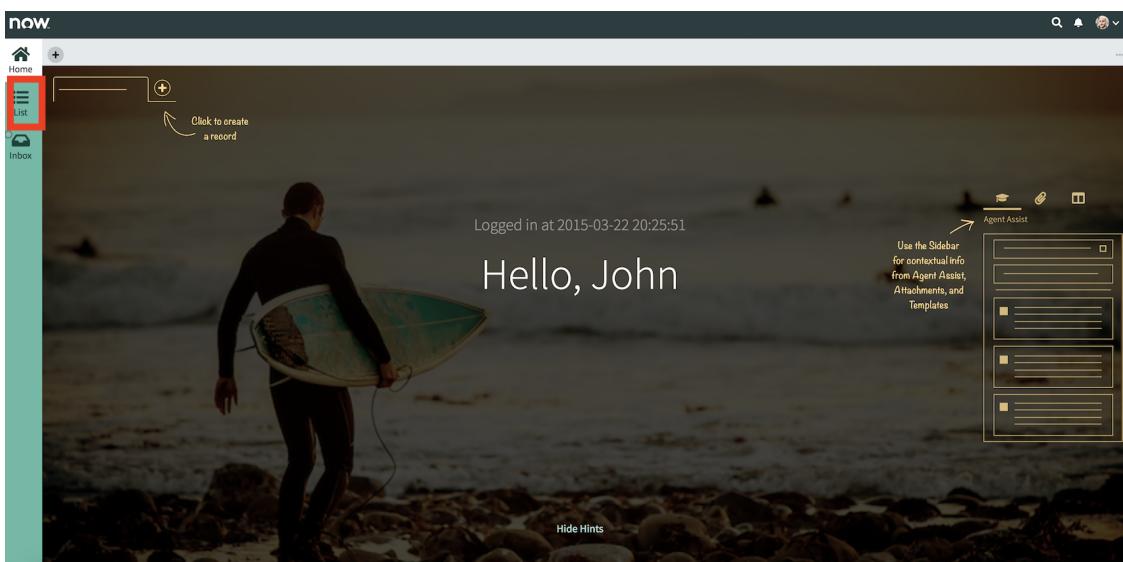
Number	Priority
CS0001018	3 - Moderate
State	Contract
New	CNTR0000603
Entitlement	Account
24x7 Customer Support	Boxeo
Contact	Julie Lewis
Product	ACME Corporation Analytics Suite 2016

8. Agent Experience: Now we'll login to the Agent Workspace as John Jason, a customer service agent with ACME. John helps ACME's customers like Boxeo get their questions answered or issues resolved. You'll get to see how our machine learning helps John be more productive and help Julie.

9. Login to the Agent Workspace: In a separate browser or Google Chrome Person, login to the agent workspace as John Jason (john.jason / Welcome1!). For quicker access, append /workspace to the URL



10. Navigate to Lists: Click on Lists to access cases



- 11. View Case Details:** Click on the case you just created to view the case details. Dismiss any special handling notes popups.

Number	Short description	Action status	Contact	Account	Consumer	Channel	State	Priority
CS0001015	Email is not working	(empty)	Julie Lewis	Boxeo	(empty)	Web	New	3 - Moderate
CS0000004	email server is down	(empty)	Ronald Hawes	Elegant Communications	(empty)	Phone	Awaiting Info	1 - Critical
CS0000063	my email is not working	(empty)	Alex Linde	Advanced Routing Components	(empty)	Web	New	4 - Low
CS0000117	email is not working	(empty)	(empty)	Tom Tom Networks	(empty)	Web	Resolved	4 - Low
CS0000716	Charging repeatedly	(empty)	(empty)	(empty)	(empty)	Phone	New	3 - Moderate
CS0001010	Router limiting telepresence performance	(empty)	Alex Linde	Advanced Routing Components	(empty)	Web	New	1 - Critical
CS0001312	Since the upgrade, the priority field in Servic...	(empty)	(empty)	Boxeo USA	(empty)	Web	Resolved	4 - Low
CS0001777	Unable to connect to email	(empty)	(empty)	Advanced Routing Components	(empty)	Web	Closed	4 - Low
CS0002031	SAP Materials Management is slow or there i...	(empty)	(empty)	Diagonal Inc.	(empty)	Web	Open	4 - Low
CS0002295	Questions regarding Email notifications	(empty)	(empty)	Boxeo France	(empty)	Web	Open	4 - Low
CS0002315	Rain is leaking on main DNS Server	(empty)	(empty)	Advanced Routing Components	(empty)	Web	Resolved	4 - Low
CS0002342	UX SME Survey homepage not working as ex...	(empty)	(empty)	Boxeo France	(empty)	Web	Resolved	4 - Low
CS0002368	We recently upgraded our test (https://imfites...	(empty)	(empty)	Advanced Routing Components	(empty)	Web	Resolved	4 - Low
CS0002376	AUTOMATION: migration resize of ornldev fai...	(empty)	(empty)	Unity System	(empty)	Web	Resolved	4 - Low
CS0003405	Seeing a lot of these in all environment logs ...	(empty)	(empty)	Spark Technologies	(empty)	Web	Resolved	4 - Low

- 12. Confirm Case Details:** Confirm that the case Category, Priority, and Assignment Group fields have been populated.

Note We used a relatively small training data set for this lab which can affect the accuracy of the results.

The screenshot shows the detailed view of the case CS0001015. The 'Category' field is highlighted with a red box. Other visible fields include 'Opened' (2019-04-12 13:11:28), 'Account' (Boxeo), 'Contact' (Julie Lewis), 'Priority' (3 - Moderate), and 'Assignment group' (CS - Integrations).

13. **Confirm Outcome:** You'll notice that the Priority is now changed to Moderate (was Low when Julue submitted the case) since the machine learning model prioritized it higher. Similarly, the machine learning model identified it as an Email issue and assigned it to the Integrations group.
14. **Summary:** In this exercise, you saw how Agent Intelligence automatically prioritizes, categorizes, and assigns a case and helps a customer service agent resolve customer issues faster.