Washington DC Order Management

Last updated: 02/01/2024

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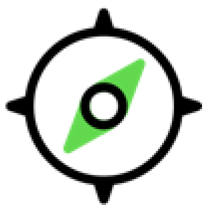
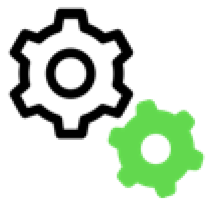
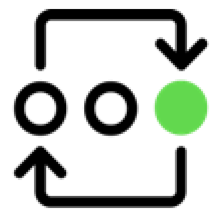
Sales and Order Management overview

Learn how you can use the ServiceNow® Sales and Order Management (SOM) applications to manage the product sales life cycle in your organization. Your agents can use these applications to generate pre-sales opportunities, provide sales quotes, capture and fulfill orders, work with contracts and entitlements, and manage the customer order workflow for changes.

Explore  Learn how you can use the Sales and Order Management applications.	Configure  Plan and configure your Sales and Order Management implementation.	Integrate  Extend capabilities in Sales and Order Management by integrating with other applications.
Use  Use the Sales and Order Management applications as an agent.		

Exploring Sales and Order Management

Whether you're starting or expanding a Sales and Order Management (SOM) implementation, learn more about its available applications and workflows for pre-sales engagement, order capture and fulfillment, and post-sales activities in your organization.

Overview

The Sales and Order Management applications enable you to manage the product sales life cycle in your organization, including pre-sales opportunities, sales quote generation, order capture, order fulfillment, and post-sales engagement.

To support the product sales life cycle, Sales and Order Management provides the following features and applications.

Sales and Order Management features and applications

Benefits

With the Sales and Order Management applications, your organization can improve sales and order processes as well as agent productivity by managing the opportunity to renewal lifecycle on one platform, and by fusing front, middle, and back office teams with one system of engagement and action. By connecting existing applications and adding ServiceNow workflows, Sales and Order Management helps increase organizational efficiency, speed order fulfillment, and both accelerate and boost revenue.

Benefits of SOM applications

Benefits	Key Features	Role
Create and manage product catalogs for commercial and technical product offerings. Commercial catalogs can be used by your agents to create quotes and orders.	Product Catalog Management-	Product catalog administrator
Set the pricing for your products through price lists, contextual price controls, and if needed, pricing from external systems.	Pricing Management	Pricing administrator
Create pre-sales opportunities that identify and track potential sales based on customer needs.	Opportunity Management application	Sales agent and account executive
Create and manage sales quotes, which are formal offers for products or services that agents propose to customers.	Quote Management application	Sales agent
Quickly configure and price quotes and complex product offers.	Product configurator	Sales and order agent, admin to set up
Capture and fulfill product and service orders to create a seamless ordering	Order Management	Order agent, fulfillment agent, agent manager, and fulfillment manager

Benefits of SOM applications (continued)

Benefits	Key Features	Role
experience for your customers.		
Create and manage contracts and entitlements as part of post-sales support.	Post Sales Support	Agent
Support change management and commercial workflows (move, add, change, and disconnect) of sold products.	Customer Life Cycle Management Workflows	Agent

Request apps on the Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Product Catalog Management

Product catalogs and categories help organize your products and their associated pricing into searchable groups so that agents can easily find products and add them to orders. Product Catalog Management is a foundational feature used by Sales and Order Management applications.

Product Catalog Management is a set of features that help agents organize and configure product offerings.

- Use the product configurator to choose product options.
- Browse and search products to find products to add to orders.
- Dynamically tailor products based on process state using State Management.
- Support complex, configurable products with options, bundles, and combined product and service offerings.
- Navigate to any catalog category and view the product offers within the Sales and Order Management applications.

Product configurator

The product configurator lets agents pick and choose product options from the Agent Workspace as they create product orders or build quotes. The product configurator also features pricing features that updates as product options are selected.

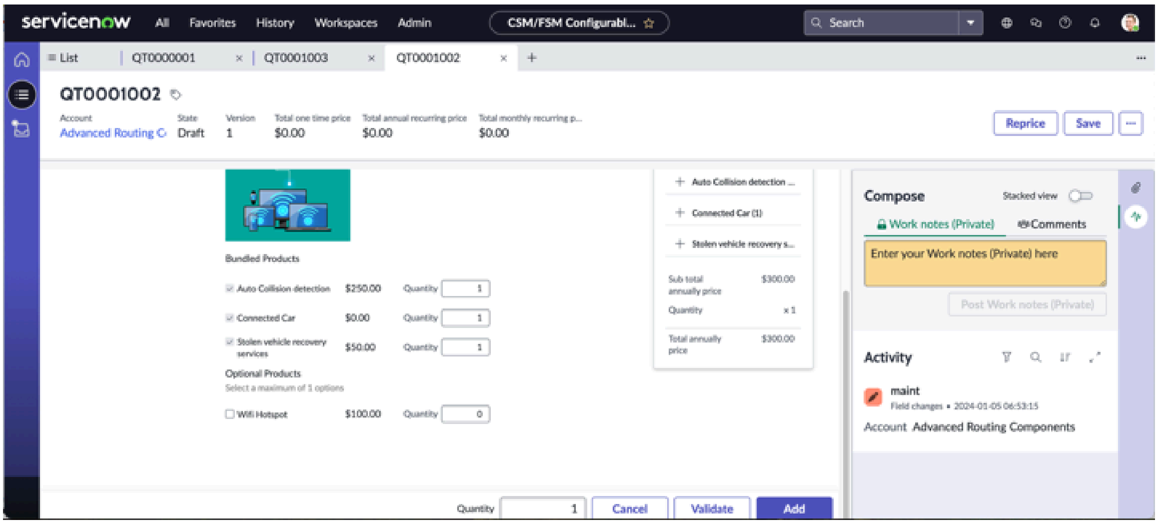
Product configurator

The product configurator lets sales agents configure product options from the Agent Workspace.

The product configurator is available from Quote Management and Sales and Order Management

Product configurator sets agent perform the following actions.

- Use the product configurator in the Quote Management application to browse product catalogs and select options.
- Access the product configurator when agents create product orders in Order Management.
- Product configurator and the product catalog use Sales and Order Management primitives to create and update order lines and characteristics.



Pricing Management

In the Sales and Order Management applications, you set the pricing for your products using Pricing Management feature, which is a foundational feature included with each application.

Price lists

A price list defines the prices of the products and services that your organization offers. Your agents use price lists to find product pricing quickly when creating quotes and capturing orders. Price lists have price list lines that define the pricing for each product offering.

The default price list is based on the currency used, but you can change the default price list used. For example, you can use account-based price lists. With account-based pricing, you can offer pre-negotiated prices to certain customers or tailor pricing to the specific needs and preferences of high-value customers.

Pricing methods

When your product catalog managers set up product offers, they indicate the pricing method for the product: either a one-time fee or a recurring fee.

Attribute-based pricing

Product and non-product attributes

Context Rule Management

Rule inputs (context variables coming from certain contexts, opportunities, quotes, etc (fields, rule conditions, rule actions. then map.

Pricing methods

When your product catalog managers set up product offerings, they set the pricing method used for the product: either a one-time fee or a recurring fee with a monthly or annual periodicity.

Pricing rule matrices

You can use decision tables to control how list prices are set for yourp

Pricing adjustments

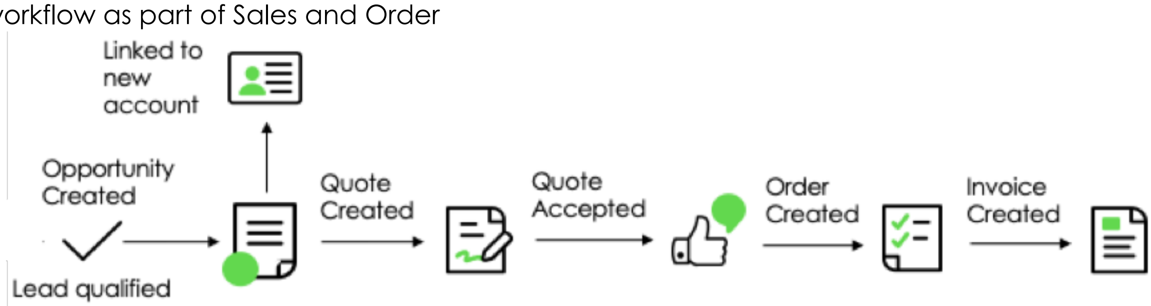
Pricing extensions

Opportunity Management

The#ServiceNow® Opportunity Management application enables your sales agents and account executives to analyze customer needs and generate product recommendations for potential customers.

An opportunity in Sales and Order Management provides maximum information about a product or service based on the needs of a customer (called a qualified Lead). A lead of a product is the only minimal information using which a sales agent advances the conversation with a potential buyer to create an opportunity for the product.

Opportunity workflow as part of Sales and Order Management.



Opportunity Management window

The opportunity management window is integrated with the Product Catalog to help sales agents access product offerings to build quotes easily and conveniently. The opportunity management window contains the following tabs:

Opportunity Management window

Tab	Description
Details tab	Use the Details tab to fill in the basic information for the opportunity.
Catalog tab	Use the Catalog tab to search for and add product line items to your opportunity.
Needs tab	Use the Needs tab to capture more accurate customer requirements.
Line Items tab	Add different line items to an opportunity.

Opportunity Management window (continued)

Tab	Description
Competitors tab	Use the competitors tab to record competitors information.
Tasks tab	Use the tasks tab to create opportunity tasks.
Emails tab	Use the emails tab to create emails to send to the required stakeholders.
Quotes tab	Use the quotes tab to create quotes directly from the Opportunity tab.

What to do next

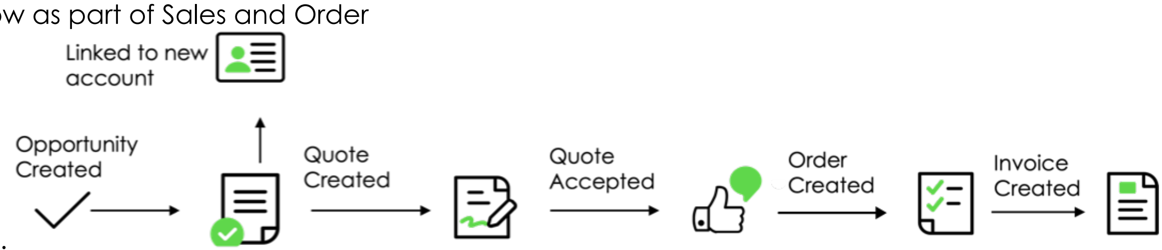
Go to Install and configure Opportunity Management to learn about installing and configuring Opportunity Management.

Quote Management

Quote Management is an application used to create and manage product quotes. Quote Management can be a separate application or part of the Sales and Order Management (SOM) application.

A quote is formal offer for products and services, proposed at specific prices and related payment terms, which is sent to a prospective customer or consumer. In the context of Sales and Order Management, quotes can be created from the Opportunity window or quotes can be created separately, depending on your configuration.

Quote workflow as part of Sales and Order



Management.

Quote Management window

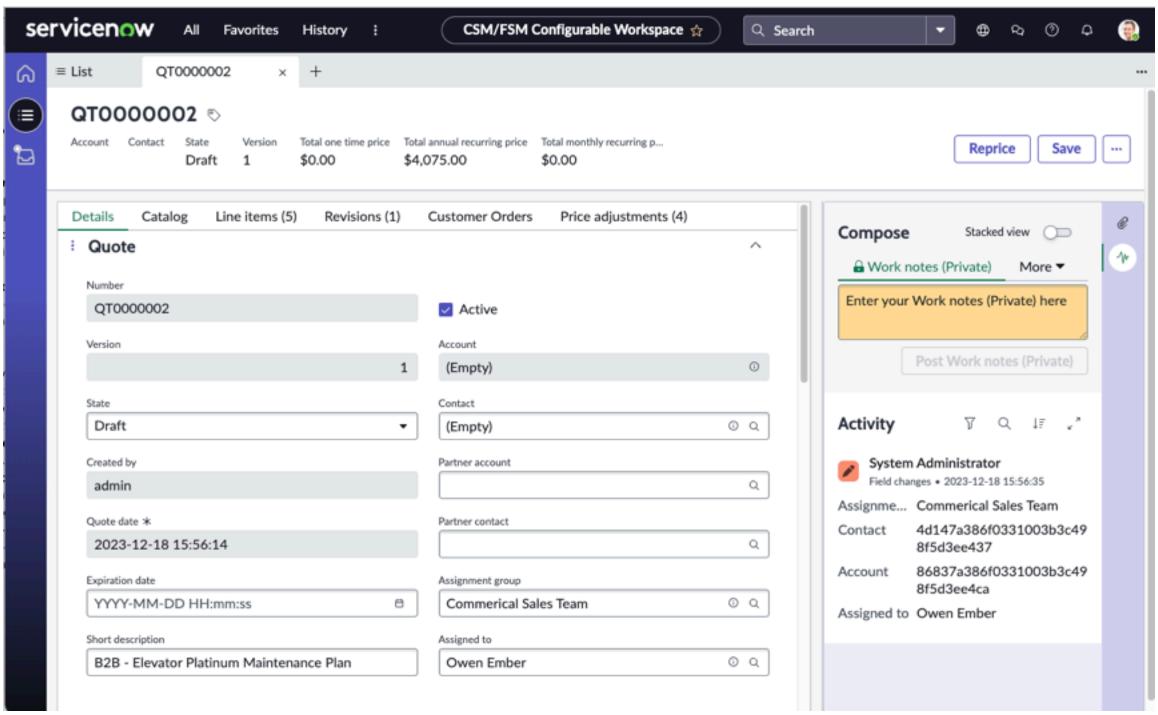
The quote management window is integrated with the product configurator to help sales agents access product offering catalogs to build quotes easily and conveniently. The quote management window contains the following tabs:

Quote Management window

Tab	Description
Details tab	Use the Details tab to file in the basic information for the quote.
Catalog tab	Use the Catalog tab to search for and add products to your quote using the product configurator. Pricing is also managed through the product offering catalogs.

Quote Management window (continued)

Tab	Description
Line Items tab	Add different line items to a quote. In each quote line item, you can update product characteristics and add pricing adjustments.
Revisions tab	Use the Revisions tab to create multiple versions of a quote.
Customer Orders tab	Use the customer order tab to turn your quote into a customer order.
Pricing Adjustment tab	View and update pricing adjustments using the Quote pricing adjustment tab.



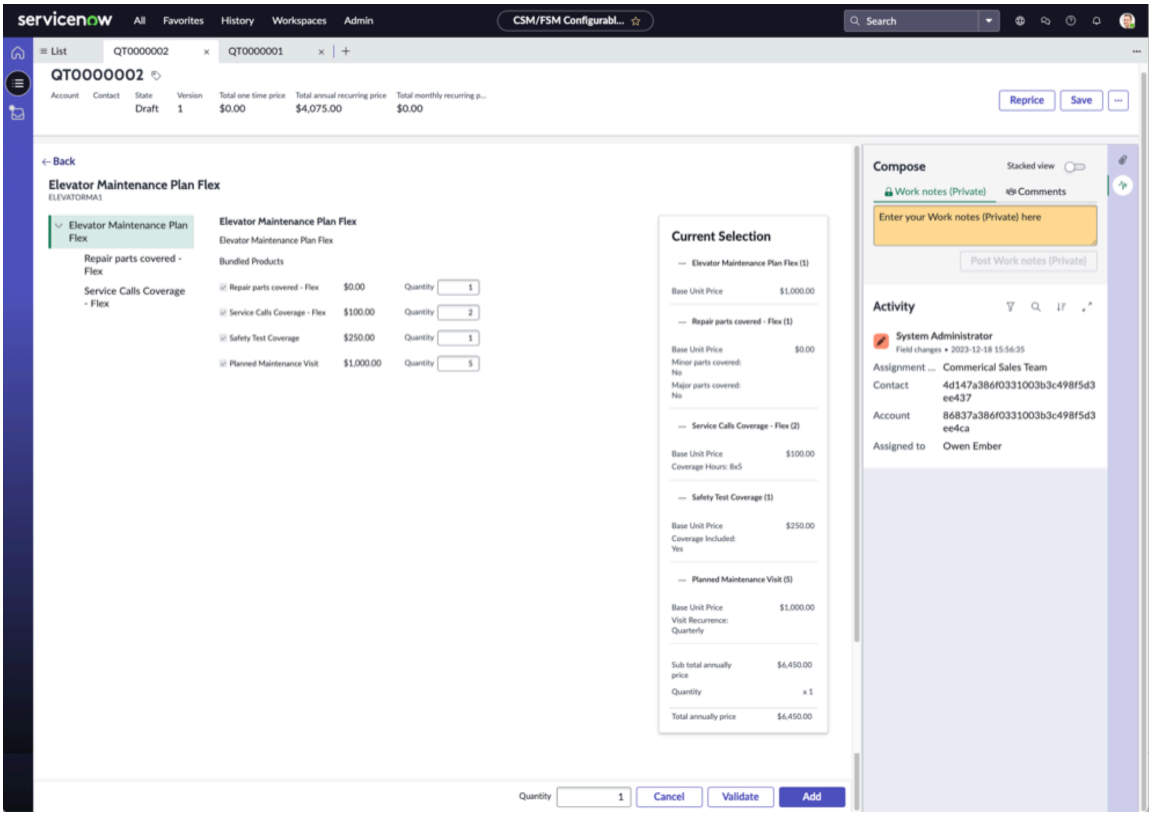
Quote Management integration with product offering catalogs

Quote Management is integrated with the product catalog and pricing to make adding products to your quote easier and convenient. Use the catalog to browse product offerings and use the product configurator to add options and pricing to your products. Then simply add them to the quote. Pricing adjustments that are fetched based on pricing matrices rules are automatically added up and presented in the quote.

Product configurator

The product configurator is part of the catalog tab and lets you configure products in the following ways.\:

- From the quote catalog, browse and add product offerings to create quote lines.
- Configure product options and relationships using the product configurator.
- The product catalog and product configurator use Sales and Order Management primitives to create and update quote lines and characteristics.



Configure and create quote line items

From the product catalog, browse and add product offers to create quote lines and characteristics.

With the product configurator, characteristics options and relationships can be changed and updated in the catalog window for Quote Management. The product configurator uses Quote Management primitives to create and update quote lines and characteristics.

Add pricing adjustments to quotes

Quote Management integrates with the order management pricing engine to get the list price and price adjustments for the product offers in your quote.

Auto pricing adjustments are fetched from the pricing engine. Manual pricing adjustments are added by the agent.

Pricing adjustments include markups, markdowns, and price overrides. Total Adjustments are applied to each line item with the cumulative total from each line rolled up to total.

Quote Management lets sales agents add the following types of manual pricing adjustment:

- Markup amount - add a markup amount to a product.
- Markdown amount - add a markdown amount to a product.
- Markup % - add a markup percentage to a product.
- Markdown % - add a markdown percentage to a product.
- Price override - override a price and create a new price.

What to do next

Go to #unique_24 to learn about installing and configuring Quote Management.

Order Management

Learn more about available features in the Order Management application so that you can create a seamless ordering experience for your enterprise customers.

Request apps on the Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Overview

With the Order Management application, you get an order management system that is configurable, extendable, and data driven. The Order Management application delivers workflows that enable your agents to capture and fulfill your customer orders. If you have a Telecommunications Service Management (TSM) subscription, you can use workflows that help you manage communications products and services.

Benefits

- Catalog-driven, cloud-based order fulfillment with a unified technical and base product catalog.
- Decomposition and orchestration workflows that are easy to configure and modify according to your business needs.
- Integrated order fulfillment and service assurance process on a single cloud-native platform.
- If you're using the Order Management for Telecommunications, Media, and Technology application, the TM Forum-based data model provides interoperability with any externalConfigure Price Quote(CPQ) application, and other systems.

Features

Order capture and enrichment

Order Management provides different ways to capture product and service orders.

- Direct order capture - Your agents and order managers can enter product or service orders using the CSM Configurable Workspace.
- If you're using the Order Management for Telecommunications, Media, and Technology application and have a Telecommunications Service Management subscription, you can use the following features:
    - Product and Service Order Open APIs - Use the ServiceNow implementation of the TMF Open APIs to capture product and service orders from third-party systems.
    - Now Service Bridge integrations - Use the Service Bridge applications to receive and fulfill product or service requests directly between your instance and the instances of your customers, without configuring and maintaining custom integrations. Service Bridge supports the verification, enrichment, decomposition, and fulfillment of these customer orders. Although the Service Bridge legacy application is still supported, see Learn about Service Bridge for detailed benefits of the current Service Bridge application.

After an order is captured, your order agents can add other required order details, such as delivery location or pricing as part of order enrichment.

Order decomposition

After a fulfillment manager reviews and approves a product or service order, Order Management breaks down the order into the required product, service, and resource orders for each order line item. This breakdown is based on the specification relationships set in the product catalog and any decomposition rules that you created. If some of the information isn't available when order decomposition starts, Order Management can stagger the decomposition to create certain orders using the current information.

Order fulfillment

Your fulfillment agents and managers complete the series of tasks needed to fulfill an order, based on an orchestration plan that defines the order tasks for fulfillment. You can use different tools to handle issues during fulfillment:

- Inflight change order management - Handle customer order changes.
- Fallout Management - Identify and resolve order processing errors.
- Jeopardy Management - Alert fulfillment managers when the assigned time for an order task is in jeopardy.

Order Management data model

The Order Management data model provides a framework that enables you to capture, manage, orchestrate, and fulfill customer orders and external service orders for products and services.

Order life cycle

The Order Management data model enables a customer order to move through the various stages of an order's life cycle.

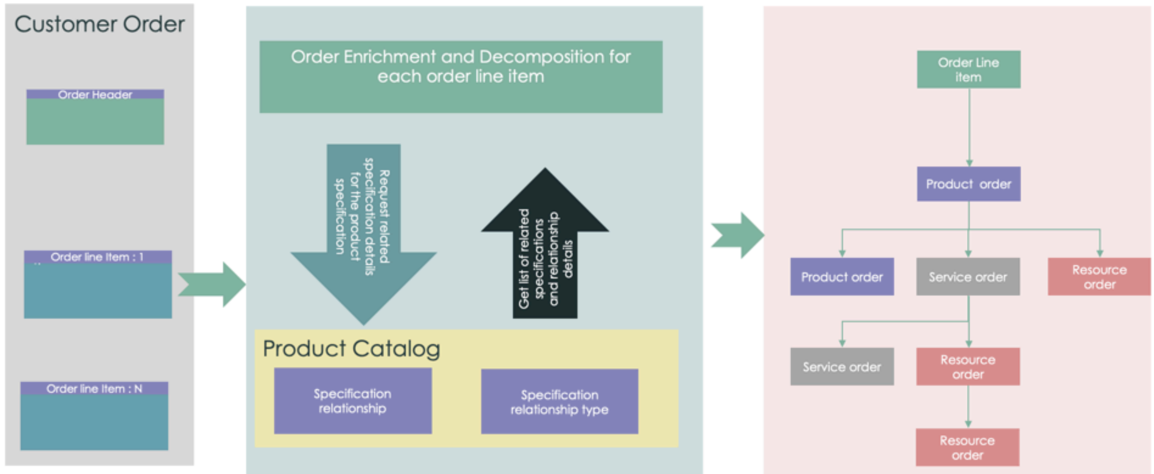
Order life cycle

Stage	Description
Customer order	Main order entity that is captured and created for managing the end-to-end life cycle of a customer request for products or services.
Enrichment	Additional information that is required for the order decomposition and for the fulfillment process. Attributes and elements can be added to orders that are required for downstream applications, such as billing or activation.
Decomposition	Order that is split into multiple suborders for fulfillment.
Orchestration	Order fulfillment coordination that uses a fulfillment flow.

Order enrichment and decomposition process

A customer order can have one or more order line items. The enrichment and decomposition process creates the required product, service, and resource order for each order line item, using the specification relationship information in the Product Catalog. The following diagram is an example of how a customer order can be enriched and decomposed.

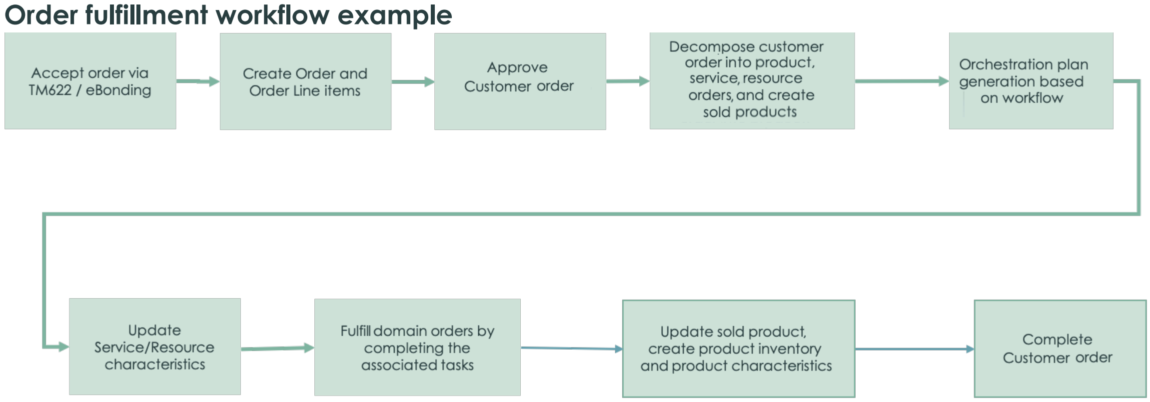
Order enrichment and decomposition process



The fulfillment plan uses decision tables to match the flow for a product order. The assigned flow then triggers the required order fulfillment tasks.

The following diagram shows how the fulfillment process works for a telecommunications product order.

Order fulfillment workflow example



Action types for customer and service order management

Learn how you can take various type of actions for your customer orders. These actions are for a move, an add, a change, a disconnection, a suspension, a resume, or a no-change of services.

By using an order action type, you can define the type of actions that you want to do with an order. The following table lists the order action types.

Order action types

Order action type	Description
Add	Add a customer order that isn't associated with an existing order from the same customer. This customer order results in new order management and fulfillment activities.

Order action types (continued)

Order action type	Description
	For example, you place a new order for a home internet service.
Change	Change an existing order, which changes a previously ordered or fulfilled product or service. This order action type includes the following scenarios: • Addition of a child product specification that the customer didn't previously order. • Deletion of an optional child product specification that the customer already has. For example, you upgrade the download speed of your home internet from 100 Mbps to 1000 Mbps.
Delete	Delete an existing customer order line item or product order. For example, you cancel your home internet service.
Suspend	Product or service order to temporarily inactivate the product inventory of its order line items. **Note:** To learn more, see Using suspend and resume actions.
Resume	Product or service order to activate the product inventory of its order line items that were previously suspended. **Note:** To learn more, see Using suspend and resume actions.
No change	Order line items with No change action are included in the order for informational purpose only. For example, a parent order line item with No change action can have a child order line item with Change or Suspend action.

Using suspend and resume actions

You can use suspend and resume actions to temporarily suspend or inactivate your product and service inventories. That way, you can capture a customer's suspend request and resume the products and services later.

Overview

As a Communications Service Provider (CSP), you can temporarily suspend or inactivate your product and service inventories. The suspend and resume requests are managed as orders with the changes in the inventory of the product and service orders during the order decomposition and fulfillment process. An order suspension and resume action can occur immediately or at a future date.

With suspend and resume actions, a CSP can do the following tasks:

- Ingest and fulfill the suspend product and service orders.
- Ingest and fulfill the resume product and service orders for suspended inventories.

- Support future-dated suspend and resume orders by using a scheduler.
- Manage the product inventory state for suspend and resume scenarios.

How the Suspend and Resume actions work

The process for the suspend and resume actions is as follows:

1. A customer order of type Suspend or Resume is received in the order management system. After reviewing the order details, a fulfillment manager approves the customer order.
2. When a customer order is approved, a new Product Inventory Operations [sn_prd_invt_product_inventory_operations] table is created as a related list in the order line items form. In case of scheduled scenario, as part of fulfillment process the state of the product inventory operations record marks to Scheduled state for order line items.
3. A pre-configured scheduler tracks the Product Inventory Operations table to check for any future scheduled date of the customer order:
   - If your customer order contains order line items with a future date (a date value for the `committedDueDate` field on the order line items form), the suspend or resume action starts on the scheduled date.
   - If your customer order doesn't include any date for the suspend or resume action, it starts immediately at the time of closure of the orders.
4. At the time of order closure, the following changes occur:
   - For a scheduled scenario, the scheduler picks up the record with a Scheduled state from the Product Inventory Operations table on the scheduled date and marks the record state to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.
   - For an immediate scenario, the state of the record in the Product Inventory Operations table is updated to Completed. And the inventory state of the order line item is updated to Suspended for the suspend action and to Active for the resume action in the product inventory table.
5. The inventory state in the Product Inventory Operations table is updated to Canceled in the following two scenarios:
   - During the inflight changes or due to the cancellation of any order line items.
   - The dates for both the suspend and resume operations are scheduled, but the date for the resume operation is before the date of the suspend operation.

For more information about reviewing the details of the product inventory operations table, see #unique_29.

Additional validations and scenarios

When the order line items for the suspend or resume actions are combined with the change or disconnect actions in a single order and the inventory state of any order line item is in a pending state, the order approval fails. The reason is due to the approval validation for the change or disconnect order.

Note: During the order approval for suspend or resume or no change actions, the product inventory should not be in the Installation Pending state.

In the order creation process for the suspend or resume actions, the `committedDueDate` field value on the order line item form can be a past date, present date, or a future date. If it's a past or present date, the inventory state should be set as Active for the suspend action and set as Suspended for the resume action.

If the `committedDueDate` field value of the customer order line items is invalid (the date field value exceeds the calendar date) for the suspend or resume action, it's then considered as an immediate action.

In the suspend or resume type of customer orders, the parent order has precedence over a child order. If the parent order is scheduled for an immediate suspend or resume action, but the child order is scheduled for any future date, the entire inventory hierarchy is considered for the immediate action.

If the top order line item for suspend or resume action is scheduled for a future date, the entire inventory hierarchy is then considered for the suspend or resume action. Child order line items are considered for suspend or resume action when they're combined with a change or a no-change action.

For an inflight change of the suspend or resume type order, only Cancellation is supported. If an order line item or the entire order gets canceled, the Product inventory Operations record is marked as Canceled during the order fulfillment process. The state change doesn't occur for the Product inventory record.

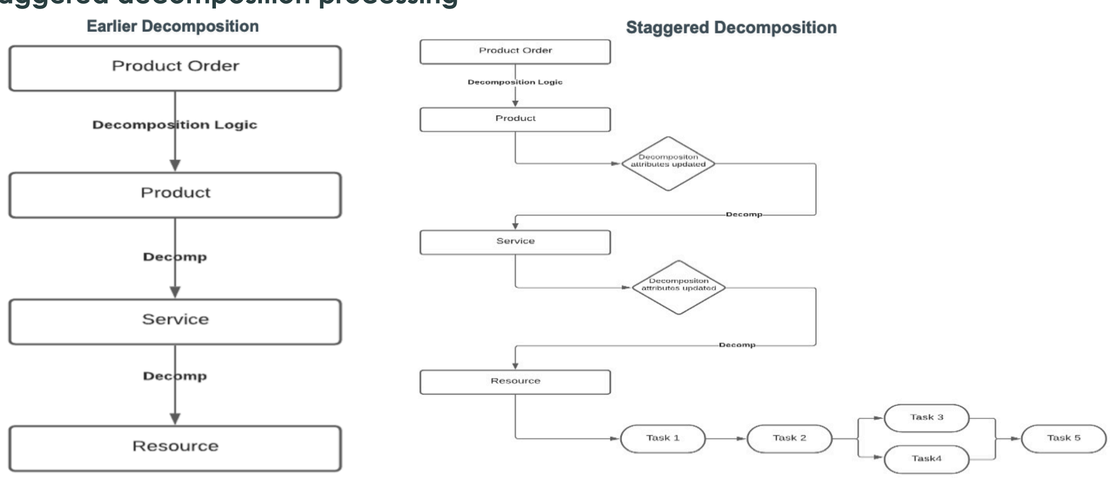
In the order creation process for the suspend or resume action, you can use the external inventory ID in the payload instead of the system-generated ID for the inventory.

Staggered decomposition

Learn how you can stagger the decomposition for your customer orders. You can decompose your customer orders in multiple iterations by using the available information at the domain level, rather than decomposing an entire customer order at one time after it is approved for fulfillment.

The following diagram shows how the staggered decomposition process works. You can start the decomposition process with the information that you already have for your order and order line items. The decomposition process skips the domain orders (product or service or resource orders) that you don't have the required information for at this time. When you add this information later, the decomposition process triggers and completes the processing for the remaining domain orders.

Staggered decomposition processing



Contrast to earlier decomposition processing

Before staggered decomposition was available, order decomposition processing started immediately after a customer order was approved for fulfillment. Order decomposition was based on the specification relationships and decomposition rules that were defined in the product catalog.

If the decomposition rule depended on any characteristic value that was not available at the time of order decomposition, the order processing skipped the decomposition of orders. However, in staggered decomposition, with the initial decomposition, the decomposition automatically triggers again for the skipped orders when the dependent characteristic value is available. The characteristic value can be set by your order fulfillment users or by the attribute propagation rules.

How staggered decomposition works

To support order decomposition in a staggered manner, you can use this method to retrigger the decomposition process for the skipped domain orders when the characteristic values are assigned in the corresponding decomposition rules.

When you approve an order, the order decomposition process starts. The decomposition process creates domain orders by using the information that is available from the order, order line items, and catalog definition. It also evaluates the decomposition rules to create the target domain orders. If the decomposition feature fails to evaluate the decomposition rules due to the unavailability of characteristic values, the decomposition is stopped for those domain orders.

When the characteristic values are available either from a user's action or from an attribute propagation rule, the decomposition process is retriggered. The process then creates the required domain orders and completes the order decomposition. If you again update the characteristic value after the order decomposition is complete, it does not trigger the decomposition for the domain order.

Note: To learn more about staggered decomposition, see Customer order decomposition after fulfillment approval.

Order quantity support in Order Management for Telecommunications, Media, and Technology

Learn how you can support and fulfill your customer orders for multiple instances of a product or service in Order Management for Telecommunications, Media, and Technology. You can create multiple domain orders that equal the order quantity for each instance of the product or service. This way, you can efficiently decompose and manage the fulfillment of your customer orders.

Overview

An instance of a product or service refers to an ordered item with a unique set of order characteristic values, such as the speed and memory size. A customer might order the same top-level product or service for different locations, but each might differ in their order characteristics. For example, if a customer orders a router for one of their locations, it might have a memory size selection that varies from the same router model that was ordered for another location. Order Management for Telecommunications, Media, and Technology supports this order quantity processing for the following scenarios:

Support for the order line item quantity that is provided by the customer when they order an item

If your customer places an order with more than one instance, the Quantity field on the order line item captures the number of instances of your customer order line items. The order decomposition process then creates the same number of product or service orders and manages the fulfillment process for each order independently.

Support for the catalog-driven characteristic quantity

In this scenario, the decomposition process decomposes a product or service order into the required number of domain orders. These domain orders are based on the quantity mapping that you define in the product catalog between the source and target specifications that are used in a product offering. The quantity mapping in the specification relationship triggers the decomposition process to create the required number of domain orders for the fulfillment process.

Support for the characteristic based quantity

In this scenario, you accept and support your customer order that has the information for order characteristics value which impacts the quantity of the domain orders. So, the order decomposition process refers to following information to create the required number of domain orders.

- Specification relationship with quantity characteristic
- Characteristic mapping

Note: To learn more about defining product catalogs, quantity-based decomposition, and how they affect order quantity support, see:

-
-
- Customer order decomposition after fulfillment approval

Order capture process in Order Management for Telecommunications, Media, and Technology

You can capture, manage, and fulfill the orders from your customers by using APIs, Service Bridge, or direct order capture with the Order Management for Telecommunications, Media, and Technology application.

The following scenarios represent typical situations in which you capture orders for processing in the Now Platform.

Scenario 1: Using APIs for order capture and upload

Your current order capture systems can be integrated with ServiceNow instances by using TMF622-based APIs. With this integration, your order capture system can submit requests for products or services, which can then be fulfilled in your ServiceNow instance.

Note: To learn more about the ServiceNow - supplied API that is based on the TMF622 Product Ordering API REST Specification, see Standardized Product Order OpenAPI.

This diagram shows how the TMF622-based API operates within the telecommunications order capture and upload process.

API-based workflow scenario for Order Management for Telecommunications, Media, and Technology

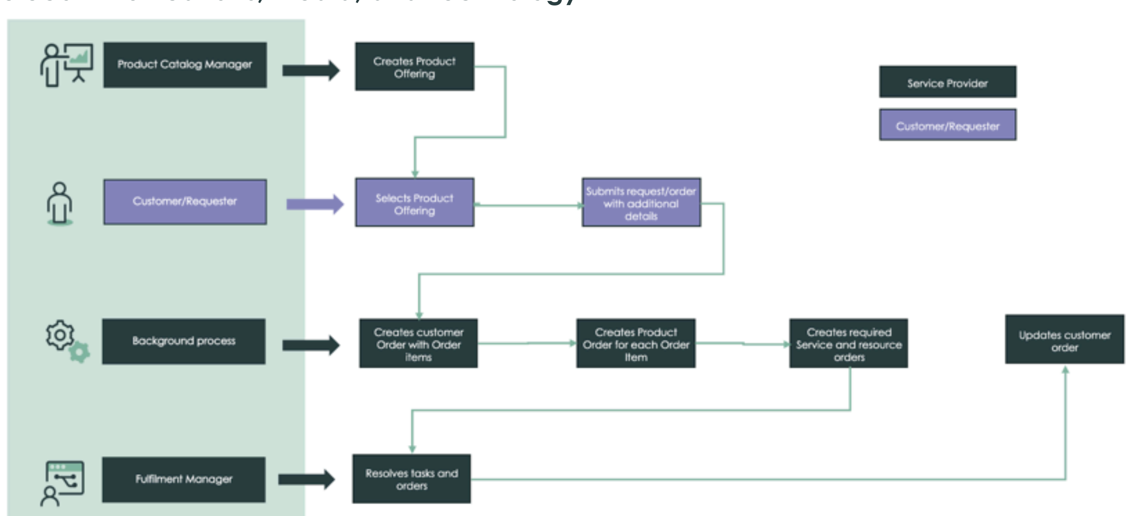
TMF622 API order capture workflow scenario

Scenario 2: Using Service Bridge for order capture and upload

Your ServiceNow instances can be integrated with the instances of your customers by using Service Bridge. With this integration, you can create and publish product offerings to your customer's instances. Enterprise customers can then submit requests for products or services, which you can then fulfill.

This diagram shows how Service Bridge operates within the telecommunications order capture and upload process.

Service Bridge workflow scenario for Order Management for Telecommunications, Media, and Technology



Enriching an order in Order Management

As an order agent, capture all the required information for an order before the order approval stage so that there won't be any delay or fallout in the order fulfillment due to missing or incorrect information.

Overview

An order enrichment process involves a set of tasks to capture additional order details by the order agent from the customer.

In the current enhanced order capture process, the agent first captures the basic order details to make the order entry and its registration in the Order Management system. Before approving the order, the order agent connects with the customer to get all the required order details as per the customer's business needs.

How the order enrichment process works

An order agent creates an order in Order Management by capturing the basic order details (the order state is set to Draft). When the order agent submits the order, the enrichment flow for the order is triggered as per the defined rules in the decision table.

If any order line item is applicable for the enrichment process, the order tasks are automatically created for those order line items and the state of the order line items move to the Enrichment in progress state.

The order agent reviews each task to provide the additional details as required for order decomposition and completes all the tasks for order enrichment. The state of the order line items move to Closed complete.

When the order enrichment is completed, the order state becomes New from the Enrichment in Progress state.

Managing service orders

Use service orders for the activation of new services or for the post-sales requests for the services that were activated for and delivered to customers at earlier dates.

Service orders contain the details of an Add, Change, or Disconnect operation that your enterprise performs for a service that you render for a customer. Service providers capture them from an external third-party Customer Order Management system through the Service Order Open API, or you enter them directly into the Now Platform®.

Fallout Management data model

Manage and fix the processing issues that occur during the fulfillment of a customer or service order. With Fallout Management, you can identify the order processing exceptions and create a fallout record to investigate and resolve the underlying processing issue. Fallout Management enables a customer or service order to continue until it's completed.

The Fallout Management data model extends the Task table. The following table lists the attributes that apply to order fallout processing.

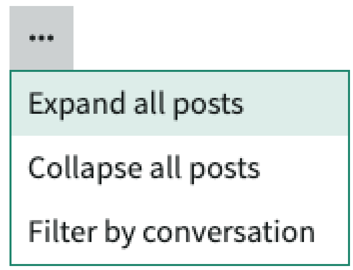
Order fallout table attributes

Field	Description
Number	Unique system-assigned fallout number, starting with a prefix of FO, up to seven digits in length.
Assigned to	Identifier for the assigned person responsible for acting on the fallout record.

Order fallout table attributes (continued)

Field	Description
Created by	Identifier for the fallout administrator who created the fallout record.
Created on	Timestamp that includes the date and time that the fallout record was created.
State	Indicator of the current processing state for the fallout record. Unless otherwise indicated, the fallout manager or agent manually assigns the appropriate state to the fallout record, depending on where it currently resides in the processing cycle. Open Fallout record that is new and not currently assigned to a person to work on. In Progress Fallout record that is assigned and currently being worked on. On Hold Fallout record that is on hold. No further fallout processing can take place until you release the hold. Awaiting Information Fallout record that is on hold and waiting for more information before processing can proceed. Resolved Fallout issue that has a resolution but you have not formally closed it. Closed Completed Fallout record that is complete and closed. Canceled Fallout record that the fulfillment manager canceled. No further fulfillment processing can take place.
Originated from	Identifier of the originating order task record that the fallout record is associated with.
Activity	Listing of the processing activities and changes in the field values that have taken

Order fallout table attributes (continued)

Field	Description
	place for the fallout record. To expand, collapse, or filter by activity stream: • Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 
Attachments	File attachments for the fallout record. Click **Browse** to add the file as an attachment.

Related topics

Managing order fallout

Create automated and manual fallout records

Flow Designer

Flows

Create a flow

Inflight change order management in Order Management

By using inflight change order management, you can determine how to manage changes for customer orders that are still being fulfilled. By managing inflight changes, your organization can reduce operational costs and deliver a better customer experience.

You can use an inflight change to modify a customer order that is still in fulfillment. You define a point of no return (PONR) after which the order can't accept any change. After an inflight change is received and approved, order management dynamically assesses the impact of the requested change and automatically generates a plan to orchestrate the order correctly. With Order Management, your organization can manage the inflight changes more easily, reduce operational costs, and deliver a better customer experience.

To learn more about how to change or cancel an inflight order request, see Managing inflight order changes and cancellation requests.

Orchestration plans for order fulfillment

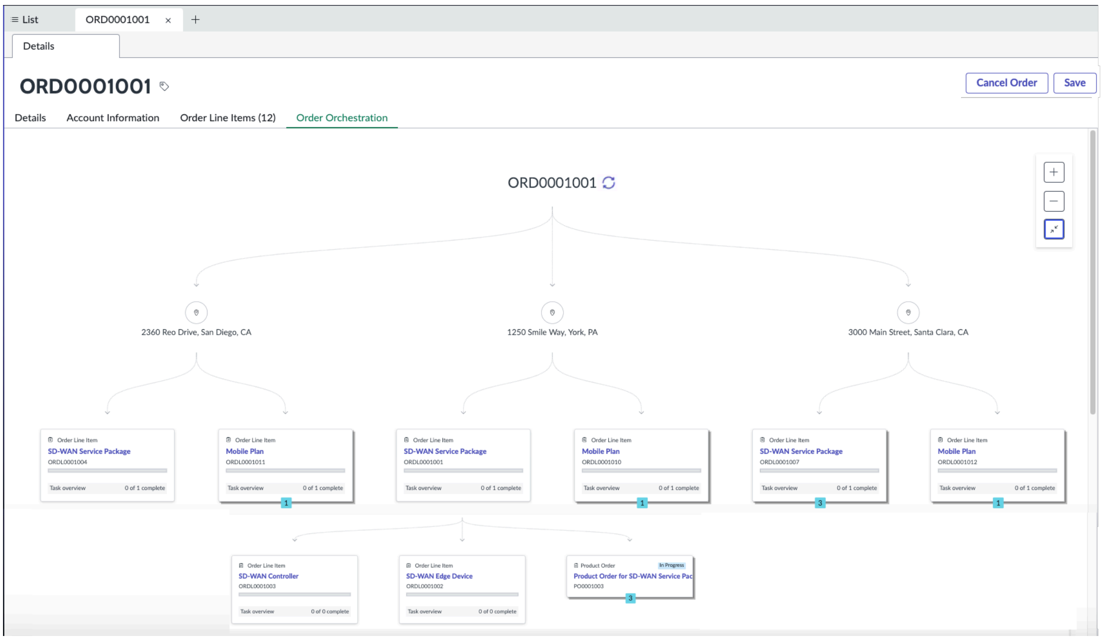
By using the Orchestration Plan user interface (UI), you can make sure that you do all the tasks that are required to fulfill your customer (product) orders. You can also view the complete order hierarchy, the status of the associated decomposed orders, the order line items, and the order tasks.

Using the Orchestration Plan UI

As an order fulfillment manager or agent, you use the Orchestration Plan UI to track all related domain orders and order tasks for an order, order line item, or domain order. You can also use the UI to review and resolve any issues for related order tasks and domain orders.

The following example shows the Orchestration Plan UI:

Orchestration Plan UI



Use the Orchestration Plan UI to see:

- A pictorial representation that shows the hierarchy of all order line items, domain orders, and order tasks for an order, order line item, or a domain order.
- The dependencies between the domain orders and order tasks.
- The current state of the associated order line items, domain orders, and order tasks within the hierarchy.

By using the Orchestration Plan UI, you can perform the following actions:

1. View a hierarchical visual representation of all order line items, domain orders, and order tasks for the selected order.
2. Open a node in the hierarchy and view the additional details.
3. Determine the current state of the associated order line items, domain orders, and order tasks.
4. Identify any order delays or fallouts in the order fulfillment process, and resolve them on time.

Fulfilling multi-site orders

The Orchestration Plan UI is especially helpful when you fulfill customer orders that involve multiple products that are fulfilled at multiple locations. For example, a customer orders the SD-WAN Service Package for their San Jose, San Diego, Denver, and Dallas locations. That means that there's a minimum of three order line items for each of the four locations:

- One line item for the SD-WAN Service Package
- One line item for the SD-WAN Controller product
- One line item for the SD-WAN Edge product

If the same customer also orders an optional SD-WAN Security product for each location, there would be an extra four order line items. That is, there's one order line item for each of the four locations (San Jose, San Diego, Denver, and Dallas).

To initiate the fulfillment process for a multi-site order, the Order Management application decomposes the order into multiple domain orders for fulfillment. The domain orders are the product, service, and resource orders that are generated during decomposition. Each decomposed order has a corresponding fulfillment flow with several order tasks. To fulfill an order by the delivery dates that you promise to your customer, you must complete all the related domain orders and resolve all the related order tasks on time.

Note: To learn about the Order Management data model and order decomposition, see:

- Order Management data model
- Customer order decomposition after fulfillment approval

Related topics

Reviewing orchestration plans and fulfilling orders

Review an order orchestration plan

Managing order fallout

Review and update the customer order fulfillment tasks

Jeopardy Management

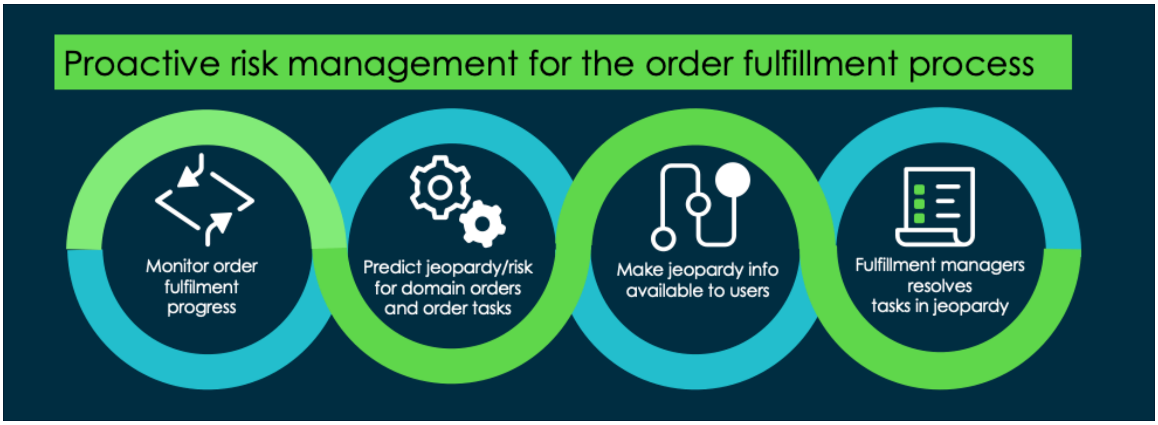
Jeopardy Management is a risk assessment tool that monitors fulfillment tasks, assesses the risk level, and alerts fulfillment managers when the assigned task time is in jeopardy.

Jeopardy Management consists of multiple components in the Order Management application that work together to monitor and report on task completion time in a fulfillment plan.

If a task is taking longer than expected, the system assesses the percentage of delay and assigns a risk level.

In Order Management, some customer orders are expected to be fulfilled within a committed time frame. The time commitment may be part of a contract that the customer and customer service provider (CSP) have signed to ensure delivery and assurance of products and services. To fulfill an order within the target date and time, a CSP depends on order management systems to monitor the fulfillment progress. Jeopardy Management proactively identities any delays and shares alerts, which can be addressed by fulfillment managers.

Overview of Jeopardy Management



How Jeopardy Management works

Jeopardy Management works by tracking tasks in an order fulfillment process. Order tasks are created up front, in a draft state when an order approval as a planned task. Order task relationships are created and task durations are set. Planned tasks are set in the Draft state and have a start time and an end time. As an order task is being fulfilled, any delays within the task's assigned amount of time triggers a jeopardy alert.

Jeopardy Management components

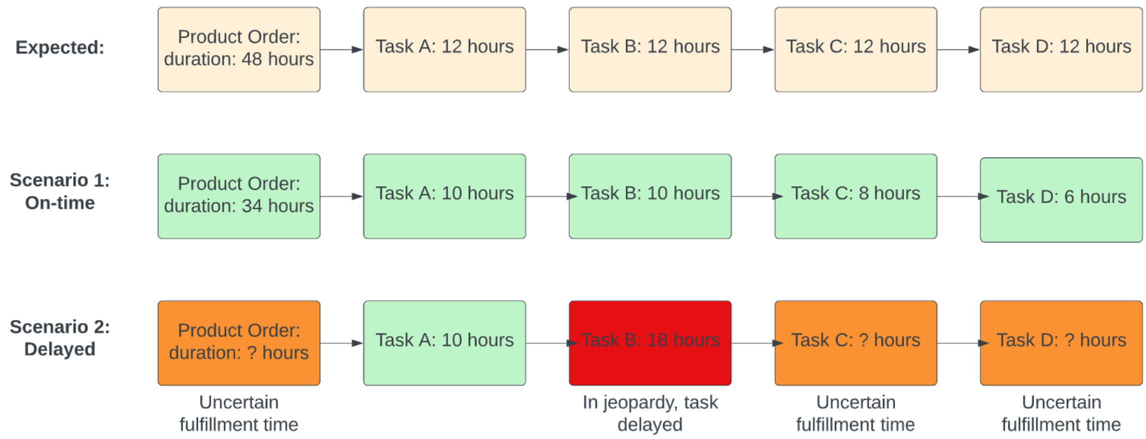
Define subflows & decision tables	Monitor order fulfilment progress	Predict jeopardy /risk	Share jeopardy info	Resolve tasks in jeopardy
❑ Define subflows that create order tasks upfront and define task relationships ❑ Configure jeopardy policy decision tables	❑ Define and launch SLA for order tasks ❑ Monitor fulfillment progress and closure of domain orders and order tasks	❑ Leverage planned task date fields and date roll up logic to produce timelines for order task fulfillment progression ❑ Monitor the progress of each order task and produce jeopardy information ❑ Rollup jeopardy date changes for all order entities	❑ Use the order forms, list and orchestration UI forms to show jeopardy details for orders, domain orders and order tasks in order to prioritize tasks to take action	❑ Based on jeopardy condition, customer can implement notifications or other logic as required based on jeopardy level flag on each entity jeopardy

Jeopardy Management alert levels

In Jeopardy Management, the fulfillment manager can set different levels of alerts for each task. As the system monitors task duration, any delay triggers adjustments to the jeopardy level of predecessor and successor tasks in the fulfillment plan.

The following image shows several Jeopardy Management configuration examples.

Jeopardy Management scenarios



The Jeopardy Management scenarios image compares some scenarios for tasks at certain risk levels: expected, on-time, and delayed. Jeopardy Management assesses all the tasks in a workflow and adjusts the risk level for tasks that occur later in the workflow.

What to do next

Use the following links to learn more about how to configure and use Jeopardy Management.

- #unique_46
- Monitoring Jeopardy Management

Jeopardy Management setup overview

Learn about how to set up and configure Jeopardy Management for Order Management for Telecommunications.

During design time, fulfillment managers must complete the following Jeopardy Management configuration and setup steps:

- Define Fulfillment Subflows: Creates an Orchestration plan for each specification. Fulfillment managers can use demo data flow actions to ensure that order task relationships are created.
- Define Service Level Agreements (SLA) Definitions: SLA definitions track how much time each order task takes to complete.
- Build Decision Tables: Build decision tables that contain information including order task duration, jeopardy level assignment, and jeopardy enablement.

Define Fulfillment Subflows

To use Jeopardy Management, fulfillment managers must either reconfigure existing fulfillment subflows or create subflows for each specification. For more information, see Define Jeopardy-enabled fulfillment workflows.

- Order tasks are created up front: Subflows that are configured for jeopardy management create order tasks up front and in a Draft state.
- Use Create Order Planned Task flow action: In Decision Builder, use the Create New Order tasks.

- Create task relationships: After all the order tasks are created, fulfillment managers create order task relationships.
- Define fulfillment progress: After all order tasks and task relationships are created, define the fulfillment progress.

Create SLA Definitions

SLA definitions and SLA Processing flows are linked to tasks in a fulfillment plan and track and report on the time jeopardy-enabled tasks take to complete. See #unique_50 for more information.

- SLA Definitions: Set start condition, pause condition, cancel condition, and reset conditions according to use case.
- SLA Durations: Durations are specified so that tracking can be achieved when task SLA is created.
- SLA Processing flow should be defined: Customer can use demo data flows, which trigger jeopardy level calculation for order tasks at 50%, 75%, 100% task SLA progression.

Link Jeopardy Management to Product and Service Specifications using Decision Builder

Decision tables are used to link and configure Jeopardy Management to product and service specifications in Order Management for Telecommunications. For more information, see #unique_46.

- Order Line Item Jeopardy Level Calculation: Returns Jeopardy Level for order line item based on delayed percentage of tasks.
- Order Task Jeopardy Level Calculation: Sets a task's jeopardy level based on percentage task completion.
- Order Task Duration Assignment Policy: Defines the order duration and task SLA definition.
- Order Jeopardy Enablement Policy: Defines if a specification has jeopardy enabled.

Jeopardy Management use cases

Jeopardy Management use cases help you explore and understand how Jeopardy Management works in different scenarios in Order Management for Telecommunications.

Design-time use cases

Design-time use cases explain some of the scenarios around configuring and setting up Jeopardy Management for Order Management for Telecommunications.

Use case: Configure business logic and workflows

System admins want to configure and define fulfillment subflows with Jeopardy Management actions and logic.

Define jeopardy logic using Flow Designer to links product specifications and a fulfillment workflow.

- Create planned order tasks in Draft state.
- Set task relationships.
- Create placeholder for domain orders.
- Create relationships for order tasks in a domain order.

- Set order task state.
- Configure jeopardy decision tables.

Run-time use cases

Run-time use cases explain some of the scenarios around running and monitoring Jeopardy Management for Order Management for Telecommunications.

Use Case: Support predictive jeopardy that monitors customer orders

Fulfillment agents and managers use jeopardy management workflows to monitor the potential risk of an order missing a customer due date.

- Calculate planned task completion dates and estimated dates.
- Monitor order tasks against service level agreements (SLA)s.
- Trigger SLA thresholds for order task and order line items.
- Update jeopardy levels as needed in the order entry forms.
- Roll up planned dates for order tasks that complete.

Use Case: Support staggered order decomposition and `Jeopardy Management`

Fulfillment managers and agents expect that when a staggered order decomposition occurs, each occurrence of a staggered order line item causes the Jeopardy Management workflow logic to restart.

- Completed decomposed order line items, the Jeopardy Management workflow restarts when additional planned tasks are added.
- New planned tasks get a task SLA assigned, which is benchmarked for all tasks repeated, and includes the date roll ups.

Use Case: Support inflight orders and `Jeopardy Management`

Fulfillment managers and agent want Jeopardy Management to pause orders. When the order revision is approved, the jeopardy monitoring restarts.

- Revision in progress and all tasks are on hold: jeopardy monitoring halts.
- Order revisions approved: task states go from on hold to their previous state and upcoming tasks move to a scheduled state.
- Jeopardy logic recalculates dates: planned dates and estimated or expected dates.
- Dates are benchmarked.
- Date roll up logic run and reflects the new start and end dates for planned and estimated dates.

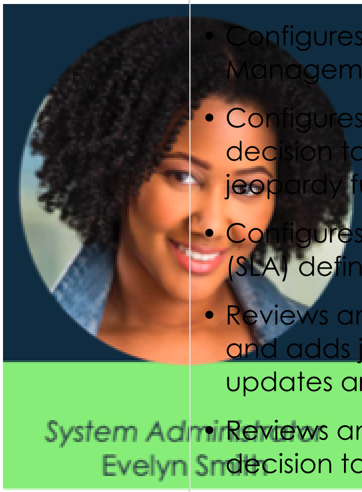
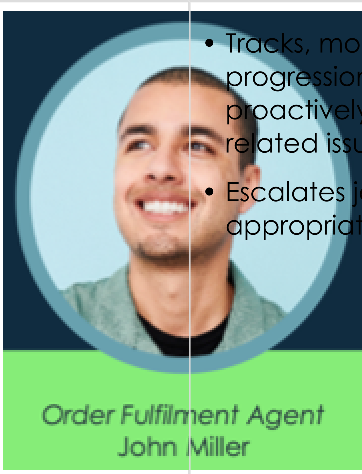
Jeopardy Management roles and personas

Learn more about how the roles and personas in Order Management for Telecommunications, Media, and Technology may change by adopting Jeopardy Management.

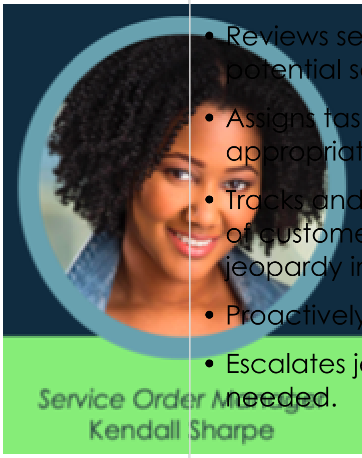
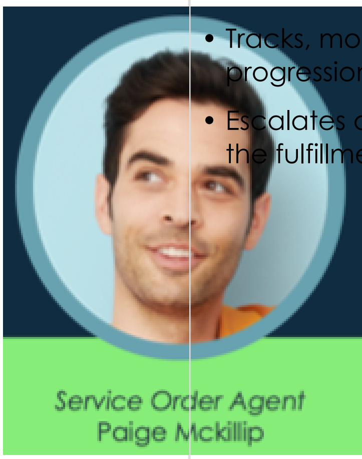
Roles in Jeopardy Management

The following table lists the roles and personas in Order Management for Telecommunications when Jeopardy Management is enabled.

Roles and Personas in Jeopardy Management

Roles and Personas	Responsibilities	Role
	• Configures fulfillment flows for Jeopardy Management. • Configures all jeopardy-related decision table rule sets that define jeopardy fulfillment policies. • Configures service level agreements (SLA) definitions for tasks. • Reviews and updates existing workflows and adds jeopardy actions when updates are required. • Reviews and updates jeopardy decision tables.	System admin
	• Reviews order jeopardy data for order impacts. • Assigns task jeopardy priorities to appropriate skilled agent for resolution. • Tracks and monitors timely fulfillment of customer order using jeopardy information. • Proactively mitigates jeopardy risks. • Escalates order jeopardy-related issues as needed.	sn_ind_tmt_orm.order_fulfilment_manager
	• Tracks, monitors, and reviews order task progressions for jeopardy data and proactively acts on potential jeopardy-related issues. • Escalates jeopardy issues as appropriate to fulfillment managers.	sn_ind_tmt_orm.order_fulfilment_agent

Roles and Personas in Jeopardy Management (continued)

Roles and Personas	Responsibilities	Role
	• Reviews service order jeopardy data for potential service order impacts. • Assigns task jeopardy priorities to appropriate skilled agent for resolution. • Tracks and monitors timely fulfillment of customer orders by leveraging jeopardy information. • Proactively mitigates jeopardy risks. • Escalates jeopardy-related issues as needed.	sn_ind_tmt_orm.service_order_manager
	• Tracks, monitors, and reviews order task progressions for jeopardy data. • Escalates order jeopardy impacts to the fulfillment manager.	sn_ind_tmt_orm.service_order_agent

Defining a horizontal relationship

By using a compatibility rule, you can define the horizontal relationships between your product, service, and resource specifications.

Overview

When you create a product catalog, you can create a vertical relationship, which is the relationship between your parent and child entities. Your product catalog manager can also enable a horizontal relationship,which is a relationship between product to product, product to service, or product to resource, by defining compatibility rules in the product catalog.

Using a horizontal relationship

The compatibility rules include the horizontal relationships between your product, service, and resource specifications. Your customers can now place orders for enterprise products where a product can depend on another product in the same or different product offering, like a sibling or a peer.

Let's look at an example of a horizontal relationship. The relationship between the Voice over Internet Protocol (VoIP) and an internet service is a good example. VoIP requires an active internet connection but VoIP and an internet service are defined in a different product hierarchy. With a horizontal relationship, you can define a relationship between VoIP and an internet service in the product catalog to support the order creation process for VoIP and to fulfill the order.

Note: To learn more about creating a compatibility rule in the product catalog, see #unique_54.

Asynchronous order processing for large customer and consumer orders

If you're an administrator for a communications service provider (CSP), you can support a high volume of enterprise, multi-site customer orders and consumer orders by using asynchronous order processing in the ServiceNow® Order Management for Telecommunications, Media, and Technology application.

Overview

CSPs support both enterprise customers and consumers. Usually, the orders from enterprise customers are large multi-site orders and the orders from consumers are high volume.

If you have a Telecommunications Service Management subscription, you can use the Product Order Open API to receive an order in the ServiceNow® Order Management application. Order processing goes through three stages:

- Order validation
- Order ingestion
- Order creation

How synchronous order processing works

With synchronous order processing, an order is received in the Order Management application through the API. Then, the order records are simultaneously created in a customer order table after the order validation.

As an administrator, you can activate or deactivate the order validation for synchronous order processing by setting the *`create_product_order_validation_sync`* and *`create_service_order_validation_sync`* system properties to True (Default) or False in the Now Platform. Synchronous order processing takes longer than asynchronous order processing when it comes to creating a large number of customer order records.

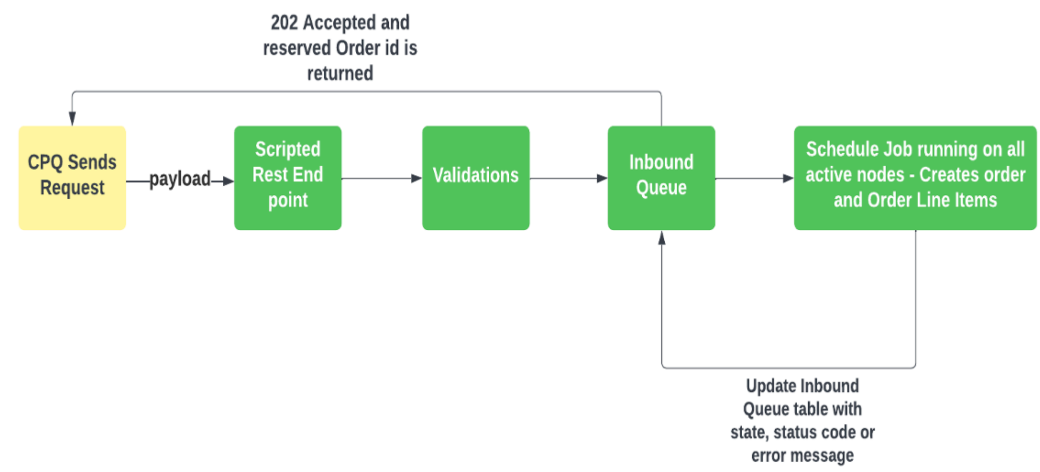
How asynchronous order processing works

In asynchronous order processing, a high volume of orders or a large number of order payloads are received through the Product Order Open API (Scripted Rest End Point) in the Order Management application from the external Configure, Price, and Quote (CPQ) systems. The order details are first validated and are then inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. If there are any validation errors, an error message is returned in the response.

This validation is managed by the *`create_product_order_validation_async`* system property for product orders and the *`create_service_order_validation_async`* system property for service orders. These properties control the validation in the asynchronous processing of orders before the orders are inserted into the Inbound Queue [sn_tmt_core_inbound_queue] table. The default value is set to True.

When the order details are successfully validated, a scheduled job runs to pick up the records from the Inbound Queue [sn_tmt_core_inbound_queue] table and then creates entries in the customer order table as shown in the following diagram.

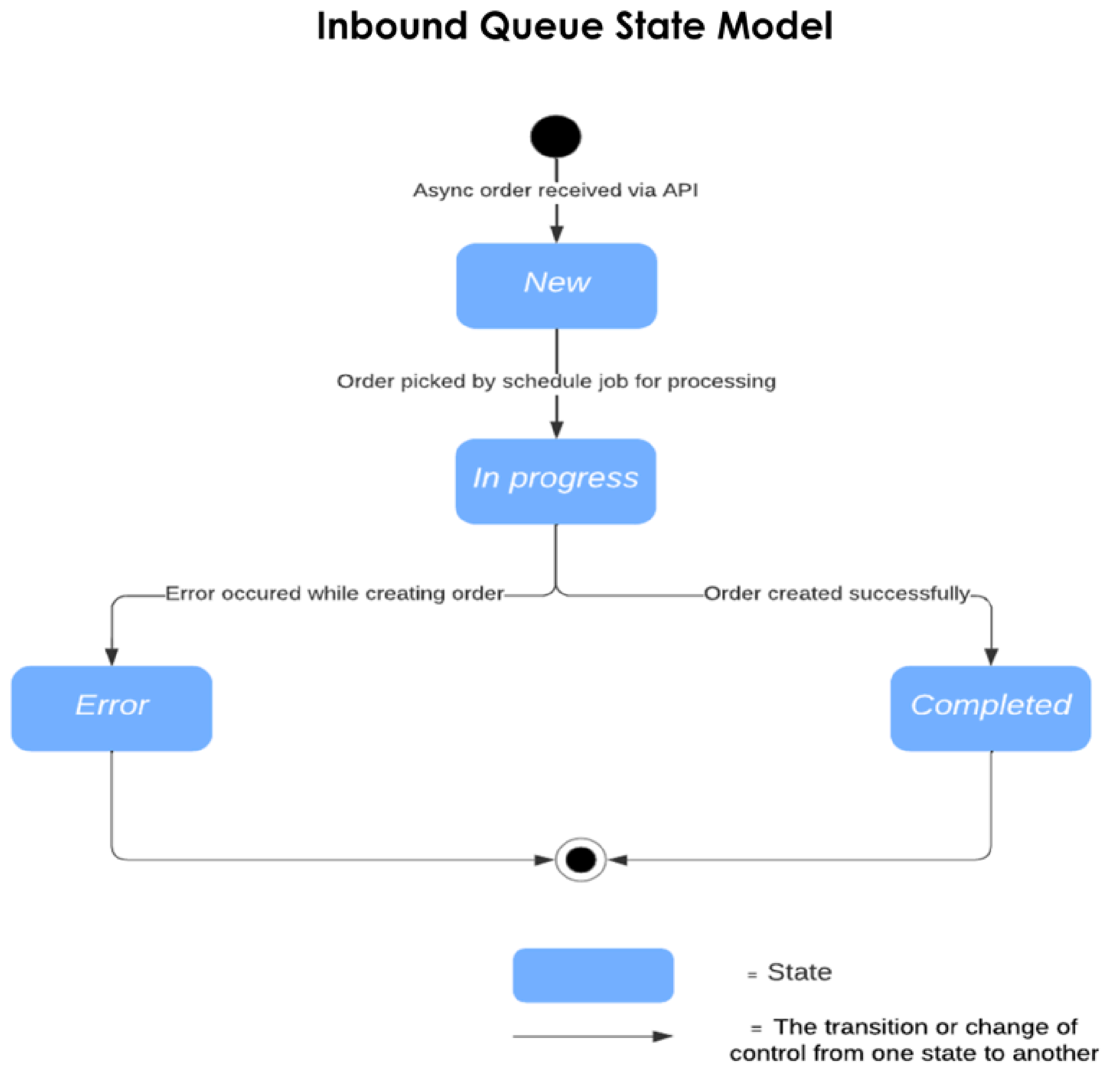
Asynchronous order processing workflow



The asynchronous order processing follows these steps:

1. You must activate the Product Order Open API. The new parameter mode enables the API to process the orders synchronously or asynchronously. For more information about the API, see Product Order Open API.
2. After you receive a high volume of orders or a large number of the order payloads through the Product Order Open API in the async mode, the order details are first validated. The order details include the product offering, order line items, order specifications, order line items characteristics, and the specification relationship of order line items. For more information on how the validation works, see #unique_56.
3. After the validation of the order details is complete, an entry for each order with a unique record ID is created in the Inbound Queue [sn_tmt_core_inbound_queue] table. The following diagram shows how the inbound queue state model works. To learn more about how the order entries are created, see #unique_57.

Inbound Queue state model



4. When all the orders are captured in the Inbound Queue [sn_tmt_core_inbound_queue] table, a scheduled job runs to create the customer orders for the records in the New state. To learn how a scheduled job creates orders, see #unique_58.

Managing the orders for a 5G sliced network

By using the Order Management for Telecommunications, Media, and Technology application, a communication service provider (CSP) can define the 5G services in the catalog and manage the creation and fulfillment of these orders for a sliced network.

Overview

Network slicing refers to a method of partitioning a physical network into multiple, separate networks. These separate networks are called slices.

By slicing a 5G network, a CSP can do the following tasks:

- Create and manage the slice templates with the required slice attributes in their product catalog.
- Support slice specifications by using the slice templates to define the slice services.

- Support the ingestion of slice orders from external systems through the existing product order API.
- Decompose the slice orders and trigger the fulfillment workflows for the decomposed orders.
- Trigger the southbound slice orders with southbound attributes toward southbound systems, such as Network Slice Management Function (NSMF), by using the service order open API.

How a slicing order is managed

A product catalog administrator creates templates in the product catalog by defining the template characteristics and template characteristic options. When the product catalog administrator is finished creating the templates, they publish it to the product catalog. With this process, the product catalog administrator can create templates for the various types of slices with the slice attributes and attribute values for the 5G network services. To learn more, see .

Next, the product catalog administrator maps the slice templates with the various specification categories. The product catalog administrator does the mapping by using the Template Selection Policy decision table in the Decision Builder. The mapped templates are automatically filled in the service specification form when a user selects a specification category. For a description of the Service specifications form fields, see Product catalog forms in Order Management for Telecommunications and Media.

Note:

- If a specification category is mapped with multiple templates, the latest published template is considered to be in the service specification.
- If a specification category is not mapped with any templates, the default category-template mapping is considered to be in the service specification.

The product catalog manager then uses the templates to define the new specifications for the 5G services. To learn more, see .

After the 5G service specifications are created, they can be used in the slice order creation and fulfilment process. The 5G slice ordering process follows the existing order approval, decomposition, and fulfilment process in the Order Management for Telecommunications, Media, and Technology application.

External product inventory ID

You can use a product inventory ID from external Configure, Price, and Quote (CPQ) systems in the Order Management application to complete the order fulfillment flow for various actions on the product and service orders.

Overview

If you're using the Order Management for Telecommunications, Media, and Technology application, you can use the enhanced TM Forum's Open APIs to create, change, disconnect, suspend, and resume product and service orders. After the order capture and fulfillment process, the system-generated IDs are created against the product inventory records to manage any future requests on the inventory for different order action types.

Using an external ID

With the support of an external inventory ID, you can do the following tasks:

- Capture the external product inventory ID in the Order Management for Telecommunications, Media, and Technology system through the Product and Service Order APIs.
- Store the external inventory ID in a new table for new orders and associate them with the product inventory records that were created after the order fulfillment. Also, update the ID in the external product inventory table for any inflight revisions during the order fulfillment process.
- Allow external CPQ or southbound systems to use the external inventory ID to submit, change, disconnect, suspend, and resume orders on the product inventory in the order management system.

To learn more, see #unique_62.

Note: You can also map the external product inventory ID with the product inventory record by using the Product Inventory Open API. For more information, see Product Inventory Open API.

Configuring Sales and Order Management applications

Set up the Sales and Order Management (SOM) applications so that your agents can work on various stages of the product sales life cycle, such as sales opportunities, quotes, order capture and fulfillment, contracts and entitlements, and also the basic product catalog and pricing features used by each application.

Configuring the Sales and Order Management applications includes several basic tasks:

- Installing the SOM applications that you want to use from the ServiceNow® Store.
- Assigning roles to your users of the SOM applications that you install.

Install and configure Opportunity Management

Install the Opportunity Management application, which enables sales agents and account executives to get pre-sales product recommendations based on customer needs. You then assign the user roles and configure related features, such as needs analysis, used in Opportunity Management.

As a user with the admin role, complete the following configuration tasks to set up Opportunity Management.

Configuration tasks for Opportunity Management

Task	Description
Install Opportunity Management	Install Opportunity Management from the ServiceNow® Store Store. It provides these key features:
#unique_64	Assign the user roles for Opportunity Management, Product Catalog Management, and Pricing Management.
Configuring needs analysis	Create the needs templates that present a set of questions that agents complete to get product recommendations for sales opportunities.

Install Opportunity Management

If you have the admin role, you can install the Opportunity Management application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with Opportunity Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Opportunity Management application (sn_quote_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Opportunity Management.
4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to install it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**.

Demo data install task	Description
	Important: If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing Opportunity Management. **a.** Install Opportunity Management. **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for Opportunity Management data model (sn_l2c_-quote_mgmt_data_model) plugin. **d.** In the System **Plugin Opportunity Management data model** window, under Related Links, select **Install Demo Data Only**.

Create opportunity stages

Create sales cycle stages for an opportunity.

Before you begin

Role required: sales_ops_specialist

Procedure

1. Navigate to **All** > **Opportunity Management** > **Opportunity Stages**.
2. Select **New** to create an opportunity stage or select an existing opportunity stage to make changes.
3. Fill in the fields in the Opportunity Stage form.

   Opportunity Stage form

Fields	Descriptions
Name	Name of the opportunity stage. For example, Qualify or Develop or Propose or Negotiate.
Order	Number of orders that is in the opportunity stage.
Type	Type of the opportunity stages. For example, Open or Closed.
Active	When the checkbox is selected, the opportunity stage is active.

4. Select **Submit**.
   The sales cycle stage has now been created for the opportunity.

Create a sales cycle for an opportunity

Create a sales cycle type for an opportunity.

Before you begin

Role required: sales_ops_specialist

Procedure

1. Navigate to **All** > **Opportunity Management** > **Sales Cycle Types**.
2. Select **New** to start a new sales cycle type or select an existing sales cycle type to make changes.
3. Fill in the fields in the Sales Cycle Type form.

Sales Cycle Type form

Fields	Descriptions
Code	Type of sales cycle. For example, NEW RENEW or NEWCUST or UPSELL.
Short Description	More information about the new opportunity sales cycle.
Active	When the checkbox is selected, the sales cycle is active.

4. Select **Submit**.
   The sales cycle type has been created for the opportunity.

What to do next

Add sales cycle stages to your opportunity. To learn more, see Create opportunity stages.

Associate a sales cycle with the opportunity stage

Link one or multiple opportunity stages with a sales cycle.

Before you begin

Role required: sales_ops_specialist

Procedure

1. Navigate to **All** > **Opportunity Management** > **Sales Cycle Types**.
2. Select an existing sales cycle type to make changes.
3. On the **Sales Cycle Stages** related list, select **Edit**.
4. Select and move one or multiple opportunity stages from Collection on the left to Sales Cycle Stages List on the right.
5. Select **Save**.
   The sales cycle and opportunity stages have been associated.

Install and configure Quote Management

Learn how to set up Quote Management so that your sales agents can create and manage customer quotes.

As a user with the admin role, complete the following configuration tasks to set up Quote Management.

Configuration tasks for Quote Management

Task	Description
Install Quote Management	Install Quote Management from the ServiceNow® Store Store. It provides these key features: • Build quotes with products and pricing, then present them to customers. • Use the product configurator to select simple and configurable product offerings. • Add pricing adjustments to products. • Convert quotes to product orders once customers have approved.
#unique_64	Set the roles for Quote Management users and your product catalog and pricing administrators.
Configuring product catalogs	Create the product offerings and catalogs.
Configuring product pricing	Set the price lists and pricing strategies that control how pricing is applied to quotes.

Install Quote Management

If you have the admin role, you can install the Quote Management application. The application includes the demo data and installations that are related ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Depending on your entitlements, you may have to install demo data after installation. Demo data comprises the sample records that describe application features for the common use cases.

Role required: admin

About this task

The following items are installed with Quote Management:

- Plugins
- Store applications
- Roles
- Tables

For more information on viewing components that are installed with an application, see Find components installed with an application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Quote Management application (sn_quote_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications appear if they're installed, or are currently installed, or must be installed. If any plugins or applications require installation, you must install them before you can install Quote Management.
4. If you want to install demo data, do one of the following depending on your entitlements.

Demo data install task	Description
If demo data is available and you want to install it	**a.** Select the **Load Demo Data** option. **b.** Select **Install**. **Important:** If you don't load the demo data during installation, it's unavailable to load later.
If the Load Demo Data option isn't available but you want demo data	Load the demo data after installing Quote Management. **a.** Install Quote Management. **b.** Navigate to the **All** and in the Filter, type `v_plugin.list`. **c.** In the **System Plugin** list, search for Quote Management data model (sn_l2c_quote_mgmt_data_model) plugin. **d.** In the System **Plugin Quote Management data model** window, under Related Links, select **Install Demo Data Only**.

Configuring product catalogs

The Product Catalog Management feature included with the Sales and Order Management applications enables product catalog administrators to create and publish product offerings in product catalogs used by your sales and order agents,

Use product catalog and categories to put product offerings in to groups.

Create product offerings

Create and publish a product offering, which become available to order agents to create product orders.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Offerings** > **Product Offerings**.
2. On the form, fill in the fields.

Product Offering form

Tile	Description
Number	System-assigned number for the product offering.
Name	Alternative name for the product offering that is added to help clarify similar product names.
Display Name	Name of the product offering that is added.
Offering Type	Offering types: ◦ Product: A product entity that an agent can add to an order from using the agent workspace. ◦ Entitlement: An entity such as a warranty or subscription that can be added to an order by an agent.
Offering sub-type	Type of entitlement: ◦ Warranty ◦ Extended warranty ◦ License ◦ Subscription
Product Specification	Specification that links the product offering to the details about the product. For simple and bundle product offerings, a specification should be created before so that it can be selected when the product offering is created. See section for more information.
Product Model	Name of the product model.
Create contract	The Create contract checkbox indicates to order agents that the product includes entitlements contracts that can be added to the product during an order.
Sellable	Indicates that the product is a sellable item.
Pricing Method	Pricing method for the product: ◦ One-time: A single fee for the product. ◦ Recurring: Fee that occurs at scheduled intervals. You can set the periodicity for a recurring fee.
Periodicity	Recurring pricing: Monthly or annually
Description	Short description of the product offering. The description is useful for the order agent to understand the product while ordering.
Offering Catalog	Catalog that contains the product offering.

Tile	Description
Start Date	Date that the product offering is available within the Order Management application.
End Date	Date that the product offering is deleted from the Order Management platform.
State	State of the product offering. States include In Draft and Published. In the draft state, product offerings can be updated.
Distribution channel	Allows you to set and lock in a distribution channel.
Owner	Owner of the product offering.
Monthly recurring charges	Charges that recur every month.
Non recurring charges	Charges that
Code	Code is a system generated alphanumeric number based on the product name.
Initial version	Version of the product offering.
Previous version	When there are several versions of a product offering, this field allows you to view previous versions.
Contract term	Length of the contract: ◦ 12 months ◦ 24 months ◦ 36 months ◦ 48 months ◦ 60 months

3. Select **Submit**.

Create a product offering category

Define a category to identify and group similar product offerings. Categories make it easier for agents to browse and navigate the catalog.

Before you begin

Role required: sn_prd_pm_product_catalog_admin and sn_prd_pm_product_catalog_manager

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Offerings** > **Product Offering Categories**.
2. Select **New**.
3. In the Product Offering Category New record, fill in the form.

Product Offering Category New record form

Number	Unique system-defined number that identifies the product offering d
Name	Name of the product category

Leaf	Lead indicates if there will be subcategories to this category.
Thumbnail image	Add a thumbnail to the product offering category.
Image	Add an image to the product offering category.
Description	Provide a description of the category.
State	A new category is automatically in Draft state. You can update the category when it is saved.
Start date	Add a start date to the category.
End date	Add an end date to the category.
Code	A system generated code.

4. Select **Submit**.

Configuring needs analysis

As a product catalog administrator, you can create needs templates, which are questionnaires that your agents use to determine potential sales opportunities for customers. When agents complete a questionnaire based on customer input, they get product recommendations that can be selected for an opportunity.

Overview

When agents create an opportunity in the Opportunity Management application, the product configurator displays a product selection guide as part of the product catalog. The product selection guide lists the needs templates available for finding product offerings that could be potential sales opportunities.

You create the following items to implement needs analysis:

- Product offering recommendations to be generated for needs templates.
- Decision trees that provide questionnaires for agents to complete and the guidance for recommended products.
- Needs templates that are associated to a specific decision tree and listed in the product selection guide.

Getting started with decision trees

A decision tree is a multi-step, guided decision process in which a series of questions is presented to an agent. You define these questions and their sequence, expected inputs, decision paths, and the recommended product offers (guidance) by using the Decision Tree Builder. This tool is a canvas for diagramming the basic elements in a decision tree, such as the start node, question nodes, and decision paths.

Before creating decision trees for needs templates, review the following information on how decision trees work:

- Decision trees in Guided decision - Become familiar with the basic elements of a decision tree and how they work, such as node types, linking inputs in nodes, and decision tree paths.
- Example configuration of a decision tree - Review an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- Answer types for questions - Learn about the various types of answers to questions, such as Choice, Date, or Integers.

Create product recommendations

Set the product offering to be used as a product recommendation for a needs template.

Before you begin

Product offerings must be defined and published before they can be set as a product recommendation.

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product-catalog_admin, admin

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Needs** > **Product Offering Recommendations**.
2. Select **New**.
   On the form, fill in the fields:

   Product Offering Recommendation New record form

Name	Name of the recommended offering. For example: Recommend Flex or Recommend Quad Play service bundle.
Description	Brief description of the recommendation. For example: Recommending flex offers based on customer needs.
Product Offering	Product offering to be recommended.

3. Select **Submit**.

What to do next

Create a decision tree for a needs template.

Create a decision tree for a needs template

Create a decision tree that has questions for agents to answer to determine customer needs and get product recommendations. Use the Decision Tree Builder to define the questions in the needs template.

Before you begin

Before creating decision trees, review the following information:

- Decision trees in Guided decision - Become familiar with the basic elements of a decision tree and how they work, such as node types, linking inputs in nodes, and decision tree paths.
- Example configuration of a decision tree - Walk through an example decision tree, including preparations for creating a decision tree, to understand the end-to-end configuration of a decision tree.
- Answer types for questions - Learn about the various types of answers, such as Choice, Date, or Integers.

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product-catalog_admin

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Needs** > **Decision Trees**.
2. Select **New**.
3. On the form, fill in the fields.

   Decision Tree form

Field	Description
Name	The name of the decision tree.
Action Label	The label of the decision tree on the needs template card in the product selection guide.
Description	The brief description of the decision tree on the needs template card in the product selection guide.
Title	The name of the decision tree on the needs template card in the product selection guide.
Show a dismiss button	Shows or hides the **Dismiss** button that cancels the flow of a decision tree. This field is enabled by default.

4. Select **Submit**
   A decision tree record and a start node are created with the name specified in the **Name** field.

What to do next

Add the questions in the decision tree for needs analysis.

Create a needs template and set the catalog relationship

Define a needs template for a decision tree and set the relationship between the template and the product catalog to which it belongs.

Before you begin

Role required: sn_prd_pm.product-catalog_manager, sn_prd_pm.product-catalog_admin

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Needs** > **Needs template**.
2. Select **New**.
   On the form, fill in the fields.

Needs Template

Field	Description
Number	Unique system-assigned number that identifies the needs template.
Name	Name of the needs template, for example Home Tech Product Selection Guide.
Decision tree	Name of the decision tree that has the questions for determining the customer product need.
Description	
Start date	Starting date and time that the needs template is effective.
End date	Ending date and time of the needs template. After this time, the needs template is no longer associated with the catalog.
State	Stage of the needs template: ◦ Draft: Initial state of the needs template. The template hasn't been published yet. ◦ Published: Template has been published. After a template is published, you can update, delete, retire, or archive it. ◦ Retired: Template has been retired and is no longer active. ◦ Archived: Template has been archived and is no longer available for use.

3. Select **Submit**.
   The needs template is displayed in the Needs Template list.
4. In the Needs Templates list, select the needs template record to set the catalog relationship.
   The Needs Template Relationships section opens.

   a. Select **New**, which opens the Needs Template Relationship form.

   b. In the **Catalog** field, select the published Product Offering Catalog associated with this needs template.

c. Select **Submit**.
The selected catalog name is listed under the **Catalog** field in the Needs Template Relationships section.

5. In the Needs Template record, select **Publish** to make it available in the product selection guide.

Using Sales and Order Management applications

As agents and managers, you use the CSM Configurable Workspace to complete various tasks when using the Sales and Order Management applications. From the workspace you access product catalogs to see the product offerings available in your organization. You also use the product configurator to create quotes and orders, manage sold products and product inventory, and work on MACD orders.

Using product catalogs

When you start an opportunity, quote, or order, a **Catalog** tab (related list) opens, which provides a visual display of the product offerings available in a catalog.

The catalog view has the following features for selecting products:

- **Catalog navigation tree**: Catalog and a list of its categories used to organize product offerings. Selecting a category filters the display and shows only the product tiles for that category.
- **Search bar**: Option for finding product offerings by product name, code, or description. The search feature displays the product tiles that match the name, code, or search string entered.
- **Product tiles**: Cards that depict each product, which has a product image if available, brief description, and an option to add or customize the product offer. The **Add** option displays when the product is a simple (fixed) product offering. The **Customize** option displays for configurable product offerings that can be tailored for a customer. Selecting **Customize** opens the product configurator for configuring the product offering.

Using the product configurator

The product configurator is an interface for customizing configurable product offers. It displays the product options available and automatically calculates product pricing as you select options.

The interface consists of three main sections:

- **Product hierarchy**: Lists the parent and child product relationships for configurable products.
- **Option selection**: Displays the product options that can be selected, for example product characteristics such as color or model.
- **Current Selection**: Shows the pricing for the options that you select, which are calculated automatically and displayed as you select product options.

Using Opportunity Management

Use the Opportunity Management to create your opportunity.

The Opportunity Management window has tabs that help you create and manage your opportunities.

Opportunity Management tabs

Opportunity Management Tabs	Description and Link
Details tab	The details of the opportunity like account, sales cycle and stage information.
Catalog tab	The product catalog to add line items to the opportunity.
Needs tab	Add more accurate information about your customer's business requirements to the opportunity.
Line Items tab	Add opportunity line items to a quote.
Competitors tab	Add competitors information to your opportunity.
Tasks tab	Create opportunity tasks.
Emails tab	Create emails to send to the required stakeholders.
Quotes tab	Create quotes directly from the Opportunity tab.

Create an opportunity

Create a new product opportunity in the Opportunity Management application by entering the details, such as account, sales stage, sales cycle type, and deal size.

Before you begin
Role required: sales_agent

Procedure

1. Navigate to the **Configurable Workspace** and select the **List** view and search for **Opportunity**.
2. In the **Opportunity - All** window, select **New**.
   The **Create new opportunity** dialog box opens.
3. Use the following table to fill in the information.

Fields	Description
Short Description	Fill in a short description for the opportunity.
Account	Provide account information.
Stage	Enter a stage of the opportunity. For example: Qualify, Develop, Propose, Negotiate, Closed- Won, or Closed- Lost.
Deal Size	Provide an approximate value of the deal.

Fields	Description
Sales Cycle Type	Enter the type of sales cycle during the creation of the opportunity. For example: NEW-CUST, RENEW, or UPSELL.
Consumer	Select a consumer.
Contact	Fill in the contact information.

4. Select **Save** to save the opportunity and **Close** to return to the main Opportunities window.
5. Select Refresh to see the new opportunity in the list.

What to do next

Start adding more information to your opportunity. To learn more, see Opportunity Management - Details tab.

Opportunity Management - Details tab

Use the details tab to add more information about your opportunity including the source and competitor.

Before you begin

Role required: sales_agent

Procedure

1. Select the opportunity that you're working with from the **Opportunity List** window.
2. Fill in all the information on the Details tab.

Opportunity details tab

Fields	Descriptions
Industry	Name of the industry. For example, Telecommunications or Manufacturing or Healthcare or Banking.
Assignment Group	Name of the customer to which the created opportunity is applicable.
Assigned To	Name of the agent to whom the opportunity is assigned.
Lost To	Name of the competitive customer to whom this deal is lost to.
Source	Name of the source this opportunity information is gathered from.
Rating	Rating of the opportunity based on the product demand in the market.
Budget Type	Mention the budget type.
Estimated Closed Date	Estimated date of closing the opportunity.
Actual Closed Date	Actual date of closing the opportunity.

Fields	Descriptions
ARR	Annual revenue of the product opportunity.
Opened By	Name of the person who has opened the opportunity.
Created	Date of the opportunity creation.
Note	Any additional information for the opportunity.

3. Select **Save**.

What to do next

Use the Product Catalog tab to add products to your quote. See for more information.

Add line items to an opportunity

Create a new product line item for your opportunity by entering the details, such as product offering, quantity, and estimated price.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Line Items** tab.
3. Select **New** to start a new opportunity line item or select an existing opportunity line item to make changes.
4. Fill in the fields in the Opportunity Line Item form.

Opportunity Line Item form

Fields	Descriptions
Number	The system-generated number of the opportunity line item.
Opportunity	The system-generated id of your opportunity.
Product Offering	The product offering that is selected for the opportunity line item.
Unit of Measure	The measuring unit of the opportunity line item.
Quantity	The quantity of the opportunity line item.
Estimated Unit Price	The estimated price of the opportunity line item per unit.
Estimated Total Price	The estimated price of the total opportunity line item.
Work Notes	Any additional information related to the opportunity line item.

5. Select **Save**.
   The Opportunity Line Item is added to the main opportunity.

What to do next

Add a task to your opportunity. To learn more, see Add opportunity tasks.

Add competitors to an opportunity

Capture competitor details for your opportunity so that you can have winning sales conversations with your customer.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Competitors** tab.
3. Select **New** to start a new opportunity competitor or select an existing opportunity competitor to make changes.
4. Fill in the fields in the Opportunity Competitor form.

Opportunity Competitor form

Fields	Descriptions
Company	The company's name that is a competitor.
Opportunity	The opportunity number.
Strengths	Strengths of the competitor.
Weaknesses	Weaknesses of the competitor.

5. Select **Save**.
   The competitor information is added to the main opportunity.

Add opportunity tasks

Create opportunity tasks to capture additional details of your customer's requirements.

Before you begin

Role required: sales_manager

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Tasks** tab.
3. Select **New** to start a new opportunity task or select an existing opportunity task to make changes.
4. Fill in the fields in the Opportunity Task form.

Opportunity Task form

Fields	Descriptions
Number	The system-generated number of the opportunity task.
Opportunity	The opportunity number.
Due date	The date by which the opportunity task has to be completed.
Short description	More information about the opportunity task.
State	State of the opportunity task.
Assigned to	The name of the sales agent to whom the sales manager has assigned this opportunity task.
Work notes	Additional notes about the opportunity task.

5. Select **Save**.
   The Opportunity task is added to the main opportunity.

What to do next

You can create appointments in your opportunity tasks. To learn more, see Create appointments.

Create appointments

Create appointments with the required stakeholders to move the business discussion forward for your opportunity.

Before you begin

Role required: sales_manager

About this task

You can create appointments only after creating an opportunity task. To create an opportunity task, see Add opportunity tasks.

Procedure

1. Navigate to **List** view and select **Opportunity Tasks**.
2. Select the opportunity task you want to work with and select the **Appointments** tab.
3. Select **New** to start a new appointment or select an existing appointment to make changes.
4. Fill in the fields in the Create New Appointment form.

Create New Appointment form

Fields	Descriptions
From	The email id of the sender.
To	The email id of the receiver.

Fields	Descriptions
Activity state	The state of the appointment.
Start time	The start time of your appointment.
End time	The end time of your appointment.
Reminder	The time interval for a reminder.
Subject	The subject information of your appointment.
Location	The appointment location.
Message	Any additional message for your appointment.

5. Select **Save**.
   The appointment is added to your opportunity task.

Compose emails

Create an email to communicate to your customer the product information that meets their business requirements or the product demo as required by your customer.

Before you begin
Role required: sales_agent

Procedure

1. Navigate to **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Emails** tab.
3. Select **Compose Email** button from the top right corner to start a new email or select an existing email to make changes.
4. Fill in the fields in the Email Draft form.

   Opportunity Email Draft form

Fields	Descriptions
From	Email id of the sender.
To	Email id of the receiver.
Subject	Subject of your email.
Email message	Body details of your email.

   Note: You can create your own email templates and use the pre-filled email templates while creating a new email. To attach any files with your email, select **Attach File**.

5. Select **Send email** to send the email or close the email form to save it in the **Draft Emails** tab.

View an existing opportunity

View an existing opportunity to make changes, such as updating its status or additional details.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
   - All- shows all the opportunities in the instance.
   - Opportunity Tasks- shows your opportunity tasks.
2. Select the opportunity that you're working with.
3. Make updates to the opportunity as needed.
4. Select **Save**.

Track opportunities using Kanban view

Personalize and manage the opportunities information that is most relevant to you and your stakeholders using the Kanban view.

Before you begin

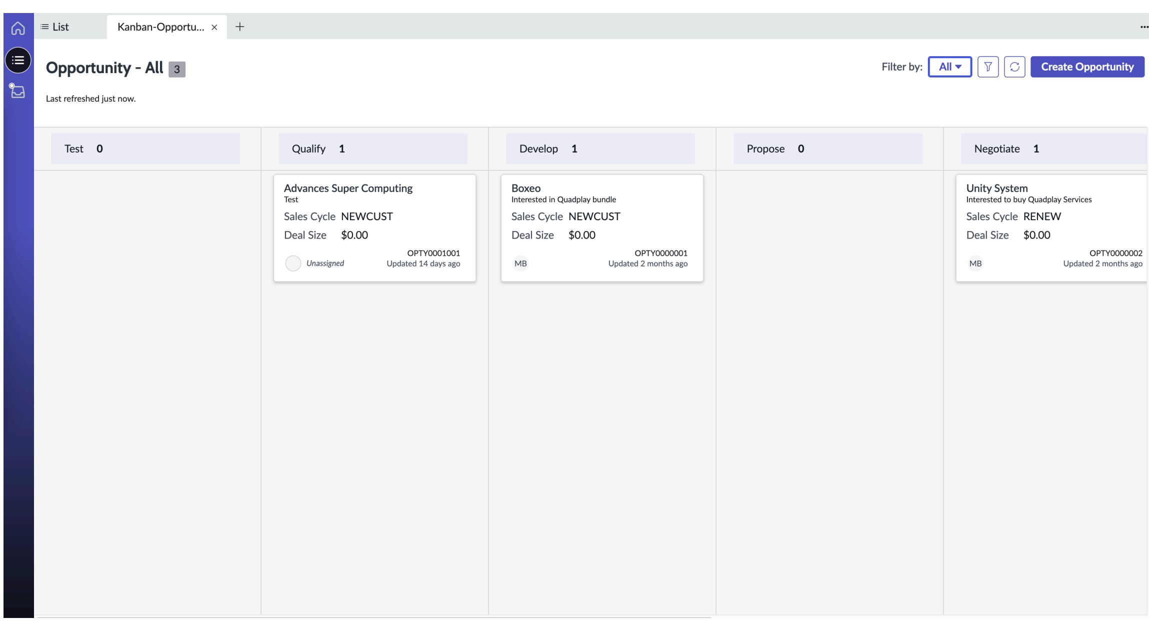
Role required: sales_agent

About this task

A Kanban view is a visual representation of your data that enables users to drag and drop the data records as per the business flow. The Kanban view feature in Opportunity Management provides the following benefits:

- Viewing the opportunities of all stages and filtering them on the basis of sales cycle types.
- Easily updating the state of an opportunity by navigating them in between different stages.

The Kanban view as part of Opportunity Management in Sales and Order Management.



Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. Select the **View Kanban** button.
    - To change an opportunity state, drag the opportunity card from one state and drop it into another state.
    - To view the opportunities of different sales type, use Filter by option on the page.
    - To create a new opportunity directly from this page, select **Create Opportunity** button. To learn more, see Create an opportunity.

Export opportunities

You can export an opportunity as a JSON file in Opportunity Management and provide it to a customer. The export opportunity feature in Opportunity Management exports a list of all opportunities.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. Select the **Export** button.
3. Select the **File Type**:
    - Excel
    - CVS
    - JSON
    - PDF
4. Select the **Delivery Type**:
    - Email - Enter a valid email address.
    - Download - Downloads the export to a local drive.

   The list of opportunities is exported according to the parameters set.

Create a quote from an opportunity

Create a quote directly from an opportunity using the Quotes tab.

Before you begin

Ensure that you have captured and provided all the information for your opportunity, such as opportunity details, line items, competitors information, etc.

Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **Opportunity - All**.
2. From the **Opportunity List** window, select the opportunity you want to work with and select the **Quotes** tab.
3. Select **Create Quote** to create a new quote from the selected opportunity.

Using Quote Management

Use the Quote Management to build your quote. The window includes the following tabs to help you create and manage product quotes.

The Quote Management window has tabs that help you create and manage your quotes.

Quote Management tabs

Quote Management Tab	Description and Link
Details tab	The details of the quote like address and contact information.
Line Items tab	Add quote line items to a quote.
Catalog tab	Agents can use product catalogs to add products to your quote.
Revisions tab	Create multiple versions of quotes.
Customer Orders tab	Convert quotes to product order sales.
Pricing adjustment tab	Adding manual pricing adjustments to products in a quote.

Building quotes

The following table shows the basic steps to creating, building, and managing your quote. Use the links to learn more information.

Building and managing quotes

Steps	Description	Link
1	Create your quote.	See Create a quote and Quote Management - Details tab for more information.
2	Build your quote by adding products from the product catalogs	See Use the Catalog tab to add products for more information.
3	Select options to products using the product configurator.	See View and update products using the Line Items tabf or more information.
4	Add pricing adjustments to quotes.	See View manaul pricing adjustments using the Pricing Adjustments tab for more information.
5	Create quote revisions.	See Create quote versions with the Revisions tab for more information.
6	Convert your quotes to customer orders.	See Convert quotes into orders with the Customer Orders tabfor more information.

Create a quote

Create a quote Quote Management to start the quote building process. The following information explains how.

Before you begin
Role required: sales_agent

About this task
When you select Create Quote, a dialog box opens prompting you for quote information. There are two categories in quote, Consumer and Account. When either is selected, a dialog box opens with different choices.

- Consumer – The quote is created for a new consumer.
- Account – The quote is created for an existing account.

Procedure

1. Navigate to the **Configurable Workspace** and select the **List** view and search for the **Quote**.
2. In the **All-Quotes** window, select **New**.
   The **Create new quote** dialog box opens.
3. Use the following table to fill in the information.

New Quote Field	Description
Short Description	Fill in a short description of the quote.
Account	Provide account information.
Consumer	Select a consumer.
Contact	Fill in the contact information.
Expiration date	Add an expiration date for the quote.

4. Select **Save and close**.
   The quote is saved and you return to the main **Quotes** window.
5. Select refresh to see the new quote in the list.
6. Select **Add Line Items** to save the quote and begin adding quote line items.

What to do next
Add details to your quote. For more information, see Quote Management - Details tab.

Quote Management - Details tab

Use the details tab to add basic information to the quote.

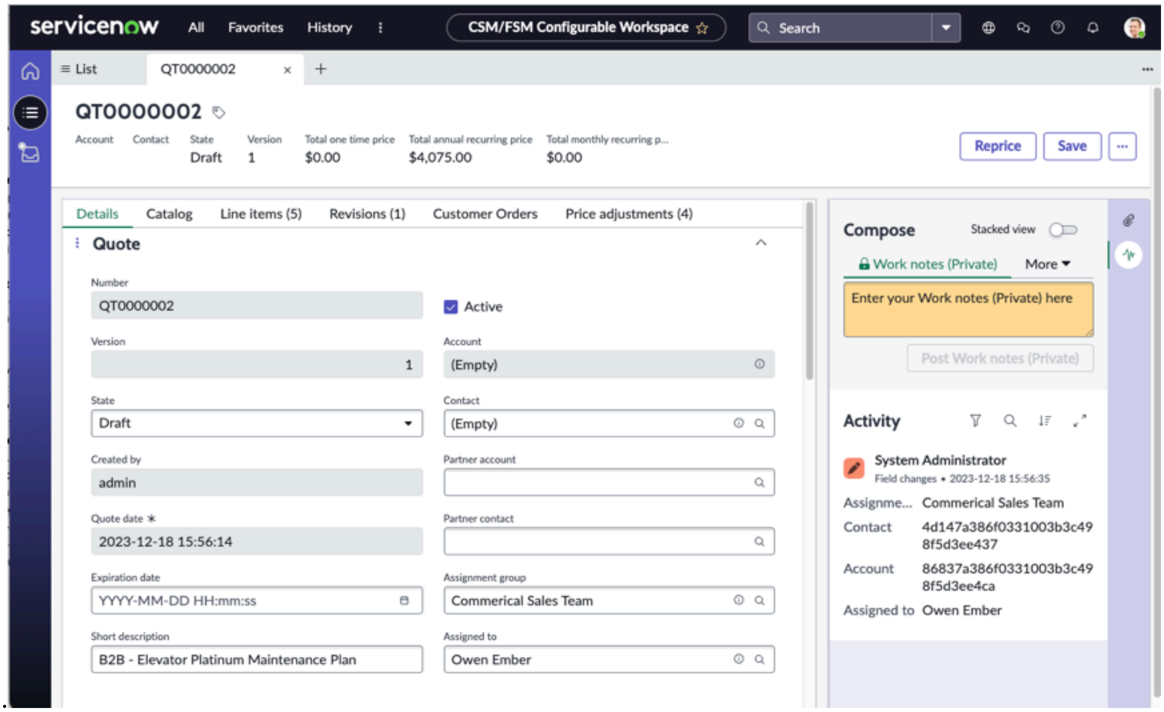
Before you begin
Role required: sales_agent

About this task
The Details tab is used to add more information to your quote including addresses and contacts. The Details tab also includes the Active box and the State field, which are explained the following sections.

Procedure

1. Select the quote that you're working with from the **Quote List** window.

2. Fill in the basic information on the Details tab.



3. Fill in the additional information, the following table explains the fields.

Quote details tab

Field	Descriptions
Active check box	The Active check box indicates that the current quote is the active quote. Use this check box when there are multiple versions of a quote. The active check box must be checked, and the quote State set to Completed, to use the quote to create a customer order. See the **Customer Orders** tab for more information.
The State field	The **State** drop-down box contains several choices and is used to track the quote. The current state appears in the list of quotes window. ◦ Draft - The default state of a quote that indicates the quote is still in development. ◦ In review - Use this state to indicate that the quote is in a review state. ◦ Pending customer acceptance - Set to this state when the quote is created and in review with a customer. ◦ Accepted - Use this state to indicate that the quote was accepted by the customer. ◦ Revised - Revised indicates that changes have been made to the quote that other working on the quote can take note. ◦ Expired - Shows that the quote is beyond its expiration date. Reset the expiration date to make the quote active again. ◦ Canceled - Use this state to show that the quote is canceled.

Field	Descriptions
	◦ Closed - Shows that the quote is closed. ◦ Completed - Shows that the quote is completed. When the Active quote is set to Completed, the quote can be used to create an order. For more info, see
Expired	Shows that the quote is beyond its expiration date.
Pricing fields	The currency for the price matches the currency stated in the account information. The Standard Price List field is the default price list for the product catalogs referenced in the quote.

4. Select **Save**.

What to do next

Use the Catalog tab to add products to your quote. See Use the Catalog tab to add products for more information.

Use the Catalog tab to add products

Use the Catalog tab in the Quote Management window to add products to your quote.

Before you begin

Role required: sales_agent

About this task

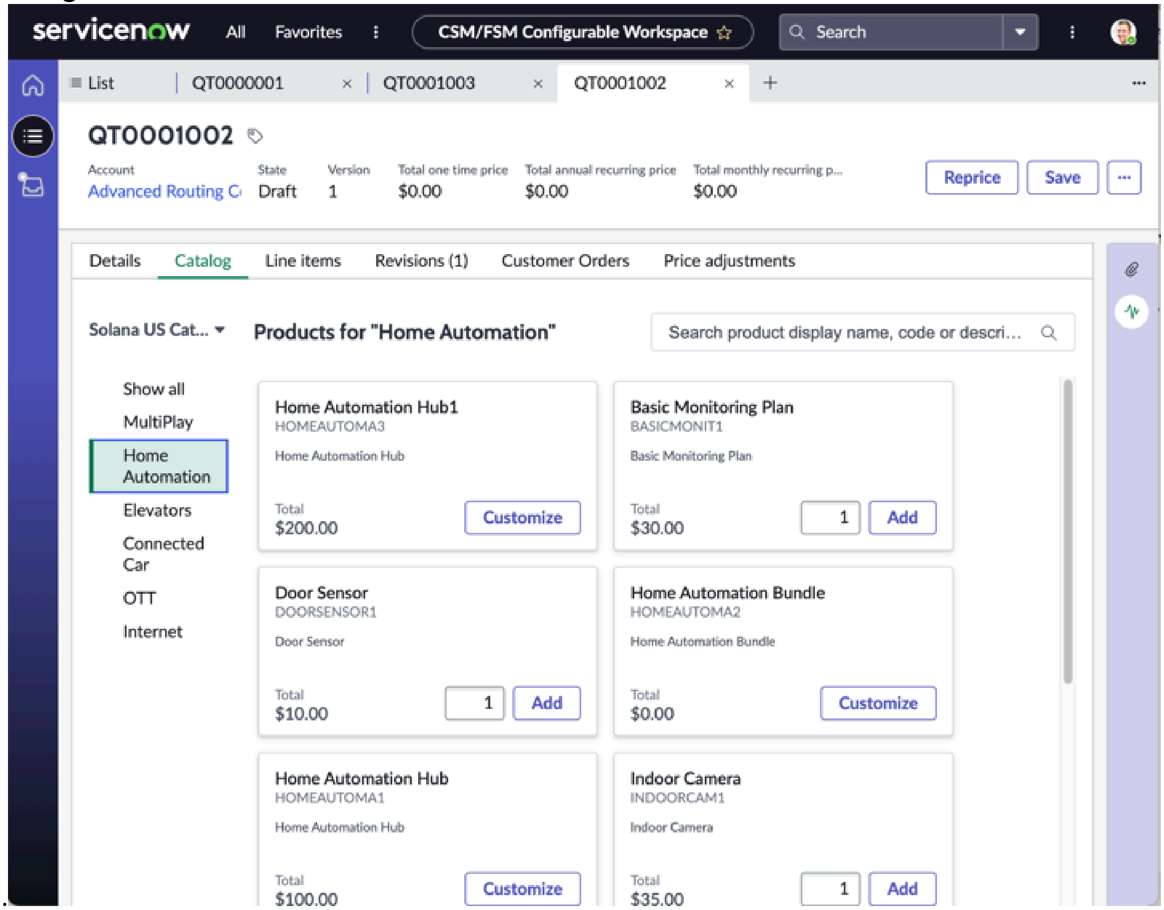
The Catalog tab lets you search for and select product offerings from catalogs to add to your quote. There are simple and complex product offerings. Complex product offerings are configurable with options using the Product Configurator.

Note: Product catalog requires you to configure product offerings and product catalogs. For more information, see Configuring Product Catalogs.

Procedure

1. Navigate to the **List** view and select **All Quotes**.
2. Select the quote that you want to work with from the **Quote List** window.
3. Select the **Catalog** tab.

The **Catalog** tab



opens.

4. Use the choice menu to review the functionality of the **Catalog** tab.

Control Element	Description
Product catalog drop-down menu	Use the drop-down menu to select that product catalog you're looking for.
Customize button	This **Customize** button appears on configurable product offerings that contain available options. Selecting the **Customize** button opens the product configurator. See for more information.
Add button	Select the **Add** to add the product to the quote. The **Add** button appears for simple products that don't have any selectable options.
Search field	Use the search field to search for a product in the product catalog selected.

5. Select **Customize** to open the `product configurator` and choose options for a product.

product configurator **Options**	**Description**
Option fields	Use the various option controls to select that options you want.
Reprice	Select **Reprice** to remove manual pricing adjustments.

product configurator **Options**	**Description**
Save	Select Save to save the options choices. Save also updates the pricing window.
Pricing window	The pricing window shows selected options, option pricing, and total pricing. Select the plus sign to see more information about each option selected.
Validate	Select that **Validate** button to validate the options.
Add	Use the **Add** button to add the product offering to the quote.

6. Select **Add**.
   The product offering is added to the quote as a **Line Item**.

What to do next

Review the Line Items tab to see the products added to the quote. See View and update products using the Line Items tab for more information.

View and update products using the Line Items tab

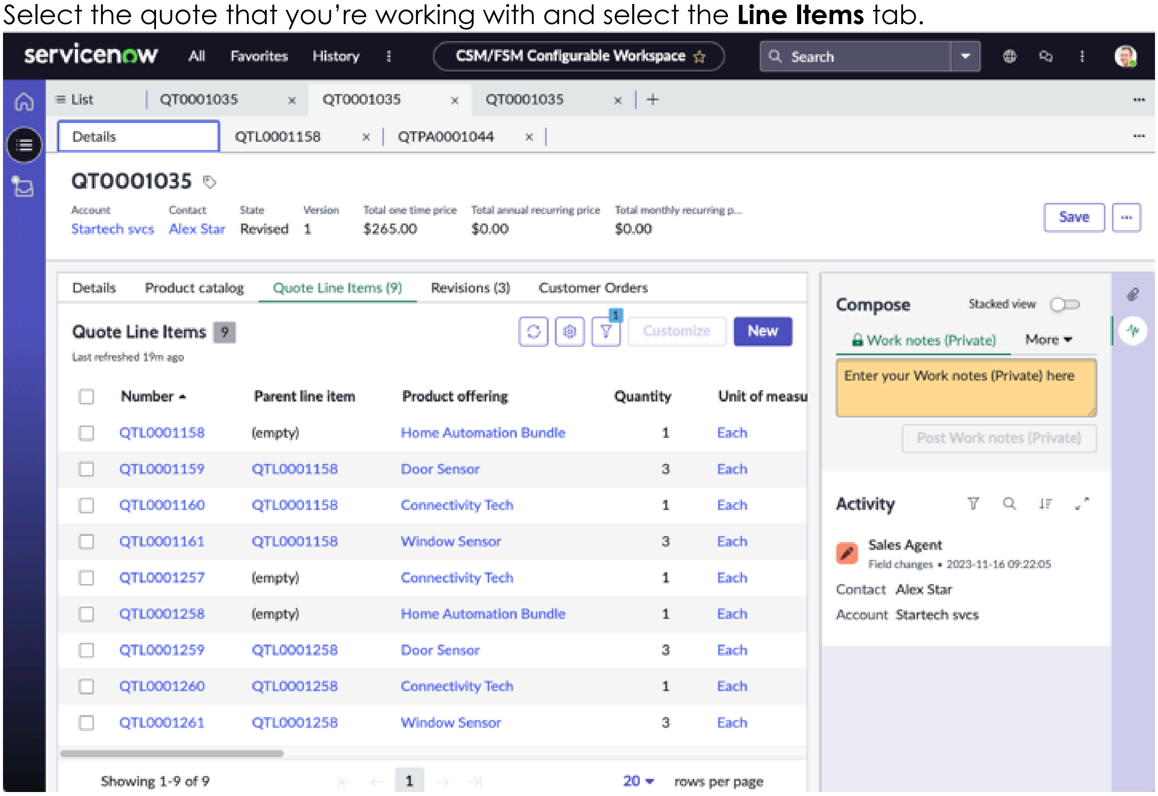
Use the Line Items tab to review and update products in your quote and to add additional line items.

Before you begin

Role required: sales_agent

Procedure

1. Navigate to **List** view and select **All Quotes**.
2. Select the quote that you're working with and select the **Line Items** tab.



3. Select **New** to start a new quote line item or select an existing quote line item to make changes.
4. Fill in the fields in the Quote Line Items.
5. Select the Quote Line Characteristics tab to add or modify the quote characteristics.
6. Select the **Pricing Adjustment** tab to add or modify a manual pricing adjustment to the quote line item.
7. Select **Save**.
   The Quote Line Item is updated to the main quote.

What to do next

Add a pricing adjustment to a quote line item. See View manaul pricing adjustments using the Pricing Adjustments tab for more information.

Add pricing adjustment to a quote line item

Add pricing adjustments to quote line items after the line item is created. Pricing adjustments can help support customers as they work through the quote building process.

Before you begin

Role required: sales_agent

About this task

Pricing adjustments for quote line items are a way to incentive customers as they move through the quote process. Sales agents have the following price adjustment options.

Pricing adjustment types

Adjustment Type	Description
Markdown %	Percentage for a markdown in price.
Markdown amount	A dollar amount of a markdown in price.
Markup %	Percentage for the markup in price.
Markup amount	A dollar amount for a markup in price.
Price Override	Overrides the product price with a new price.

Procedure

1. Navigate to the **List** view and select **All Quotes**.
2. Select the quote line item for a pricing adjustment.
3. In the adjustment dialog, use the Adjustment type menu to select an adjustment type.
4. Enter an adjustment value in the Adjustment value.
5. Add a description of the price adjustment.
6. Select **Save**.

What to do next

Update product characteristics. See Update product characteristics for more information.

Update product characteristics

Use the Quote Characteristics tab to make updates to product characteristics.

Before you begin
Role required: sales_agent

About this task
After a quote line is created, it may be necessary to change product characteristics as the quote is negotiated with a customer. Product offerings with customizable options can be updated as the quote evolves.

Procedure

1. Navigate to the **List** view and select **All Quotes**.
2. Select the line item for the product characteristic change.
3. Select the Quote Line Characteristics tab.
4. Select the quote characteristic you want to update.
5. Make the characteristic change and select **Save**.

What to do next
Create multiple quote revisions. See Create quote versions with the Revisions tabfor more information.

Create quote versions with the Revisions tab

Use the revisions tab to view all the versions of your quote and to create versions.

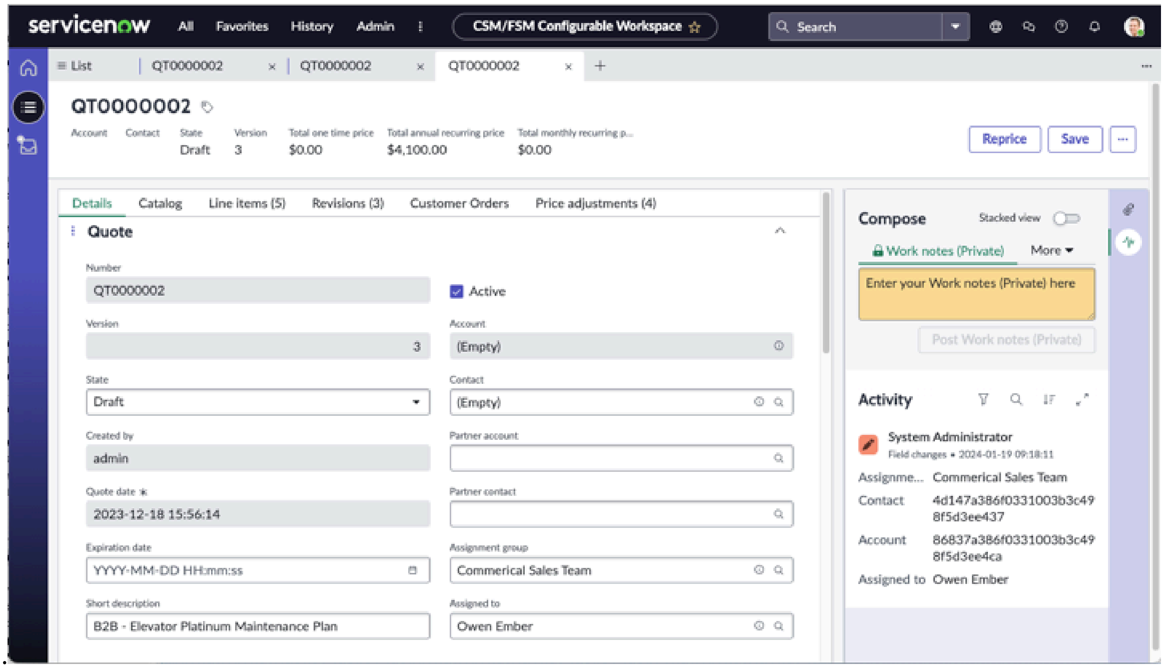
Before you begin
Role required: sales_agent

About this task
You can create revisions of a quote by using the Revisions tab. All the quote versions are listed. The active quote shows a check in the Active check box.

Procedure

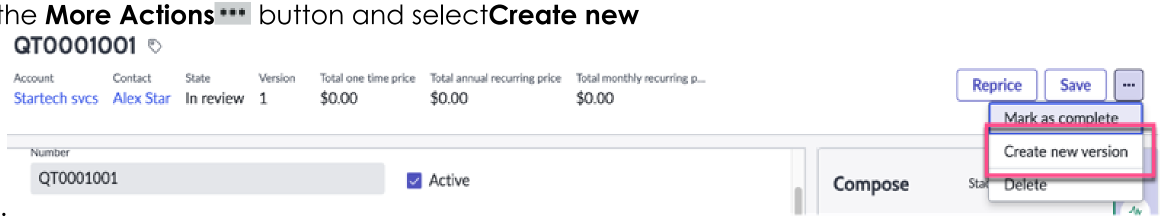
1. Navigate to the **List** view and select **All Quotes**.
2. Select the quote that you're working with.

3. Select the **Revisions**



tab.

4. Select the **More Actions** *** button and select**Create new**



version.

A new version of the quote is created. Select to quote in the message to open the new version. Versions numbers are sequential. The Active check box is checked for the active quote. See the Revisions tab for a list of all current versions of a quote.

5. Return to the **Quote list** window and refresh to see the latest version created.

6. Select the **Active** check box as a reminder of the active quote.

What to do next

Use the Customer Order tab to start an order from the Quote. See Convert quotes into orders with the Customer Orders tab for more information.

Convert quotes into orders with the Customer Orders tab

Use the Customer Order tab to convert a quote into a customer order in Quote Management.

Before you begin

Role required: admin

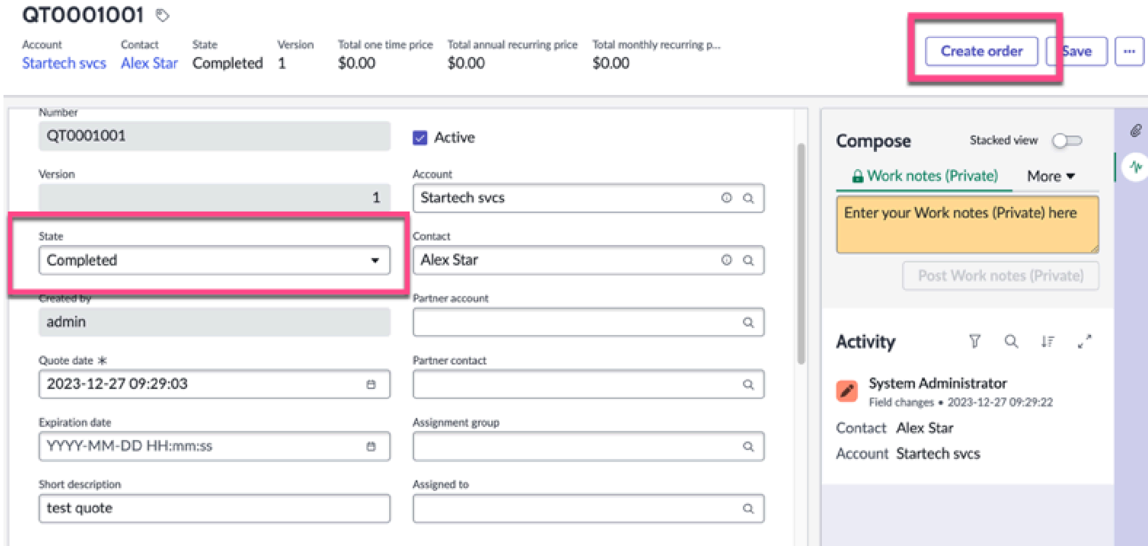
About this task

The quote must be in an Active state and the quote state must be set to Complete. Then the Customer Orders tab becomes active.

Note: Verify your entitlements to see if you have access to this feature.

Procedure

1. Navigate to the **List** view and select **All Quotes**.
2. Select the quote that you want to convert to a customer order with from the **Quote List** window.
3. Change the Quote State to **Complete** and select



Save.
4. Select the **Create Order** button.
   When the order is created, a message appears with the order number.
5. Select the Order number in the message to open the order.
   The **Order Line Item** window opens showing the order line items, pricing adjustments, and order tasks. For more information about using the **Order Line Items** window, see Creating, changing, and cancelling manual product orders.

View manaul pricing adjustments using the Pricing Adjustments tab

Use the Pricing Adjustments tab Quote Management to view and update manaul pricing adjustments made to order line items in your quote.

Before you begin

Role required: admin

About this task

To create a pricing adjustment, see Add pricing adjustment to a quote line item.

Procedure

1. Navigate to the **List** view and select **All Quotes**.
2. Select the quote that you want from the **Quote List** window.
3. Select the **Pricing Adjustment** tab.
4. Select the price adjustment line item that you want to update.
5. Make the pricing adjustment.
6. Select **Save**.
   The pricing adjustment is updated and reflected on the overall quote pricing field.

View an existing quote

View existing quotes to update the quote status or make other changes.

Before you begin
Role required: sales_agent

Procedure

1. Navigate to the **List** view and select **All Quotes**.
    - All Quote- shows all the quotes in the instance.
    - My Quotes- shows your quotes.
    - My Teams Quote- shows the team quotes.
2. Select the quote that you're working with.
3. Make updates to the quote as needed.
4. Select **Save**.

Export quotes

You can export a quote as a JSON file in Quote Management and provide it to a customer.

Before you begin
Role required: sales_agent

About this task
The export quote feature in Quote Management exports a list of all quotes. Use the following steps to export quotes.

Procedure

1. Navigate to the **List** view and select **All Quotes**.
2. Select the Export button.
3. Select the **File Type**:
    - Excel
    - CVS
    - JSON
    - PDF
4. Select the **Delivery Type**:
    - Email - Enter a valid email address.
    - Download - Downloads the export to a local drive.

   The list of quotes is exported according to the parameters set.

Using Order Management

You can manage and fulfill customer orders and service orders in the Order Management application.

Action types for orders

The Order Management application supports the following types of customer and service orders.

Order action types

Order action type	Description
Add	Add a customer order that is not associated with an existing order from the same customer.
Change	Change an existing order, which changes a previously ordered or fulfilled product or service.
Delete	Deletion of an existing customer order line item or product order.

To learn about the different types of orders that you can manage in the Now Platform, see the following:

- Order Management data model
- Action types for customer and service order management
- Creating, changing, and cancelling manual product orders
- Reviewing customer (product) orders
- Reviewing service orders

Methods for capturing orders

You can capture customer (product) and service orders from the following sources:

- Your agents can capture customer and service orders using the CSM Configurable Workspace..

  To learn more about when to use Order Capture, see:

  - Creating, changing, and cancelling manual product orders
  - Creating orders for new services, service changes, or disconnections
- If you have a Telecommunications Service Management subscription, you can capture orders from the following:
  - Third-party order management systems through the Product Ordering Open (TMF622) or Service Order Open (TMF641) APIs.
  - Through the Service Bridge in the San Diego and later releases.

Managing inflight order changes and cancellation requests

Manage how your organization receives changes for customer orders, service orders or individual line items that are still being orchestrated and fulfilled. By using inflight change order management, you can designate when you permit such changes. You can also assess the impact of the requested changes for an order or order line item, and automatically generate a plan to compensate for them when you approve the revision or cancellation request.

Overview

An inflight order is an order that is in the process of being orchestrated and fulfilled but has some work pending. Inflight changes and cancellations can occur in large enterprise orders. An inflight order change refers to a change that is issued for an order line item that is currently undergoing fulfillment and pending completion.

Enterprise telecommunications order management is complex. It can take weeks or months to fulfill a multi-site order. Enterprise orders can involve the large-scale purchases of products and services, often for multiple locations around the world. Inflight orders can go through revisions that incorporate changes that are submitted by customers or identified by internal personnel during the order fulfillment process.

To revise an inflight order or order line items that have already been decomposed to suborders, service provider employees have to assess the impact of the requested changes. If there is no data-driven process and framework, users try to manage the changes with manual tasks that can lead to delays in the order delivery process and result in poor customer and employee experiences.

Prerequisites

You can define the following change types and flow actions that affect inflight order change processing in your organization. See the following table for the prerequisite tasks that you can do.

Task	Description
Optionally define additional enterprise-specific inflight order change types.	See Create additional inflight order change types .
Configure the behavior of order task records to respond appropriately for inflight order changes and cancellation requests.	See Configure order tasks to respond to inflight revision and cancellation requests.

Types of Inflight order changes

Order change requests typically originate from your customers for purchased products and services or from internal personnel, such as order fulfillment agents, when they are managing their fulfillment. When you submit an inflight order revision, you assign a change type to track the types of order changes that are submitted by users. The Now Platform supports Characteristic, Contact, Quantity, related items, and Price change types.

Note: An administrator can define additional change types for tracking purposes. To learn more, see Create additional inflight order change types .

Customer-initiated requests

Based on the types of customer requests, you update an inflight order to do the actions that are listed in the following table.

Customer-driven order changes

Type of change	Example
Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact	A customer supplies a new email address or the name and telephone number of a new corporate contact.

Customer-driven order changes (continued)

Type of change	Example
information for an order line item for a product or service in a location.	
Incorporate changes that are related to pricing details.	A customer requests a reduction to a non-recurring charge or a monthly recurring charge on an order line item.
Add a product or service to an order.	A customer wants to add a new item to an existing order.
Increase or decrease the quantity of order line items in a product or service order.	A customer wants a higher or lower the quantity of an existing order.
Add, change, or cancel a product or service, or product or service options, in a related domain product or service order.	A customer wants to update the characteristic value of a product or service that the customer ordered at an earlier date. For example, the customer wants to change the speed of an internet service from 100 Mbps to 500 Mbps.
Incorporate changes that are applicable to the related items of a product or service order. To learn more, see #unique_174.	A customer wants to add or change an item to an order that has horizontal relationships. To learn more, see Defining a horizontal relationship.

Fulfillment user-initiated requests

To expedite the completion of the order fulfillment process, the order fulfillment or service order agents and managers often request changes to product, service, or resource orders. Based on the types of internal requests, you update an inflight order to do the actions listed in the following table.

Fulfillment-driven order changes

Type of change	Example
Incorporate changes that are related to contact details. These changes can include an update, deletion, or addition of contact information for an order line item for a product or service in a location.	A customer supplies information about a new corporate contact person on a pending delivery of an enterprise order.
Add, change, or cancel a product, including product options, in a related domain product order.	A customer orders a modem that is incompatible with the higher-speed 500-Mbps internet service that the customer ordered. It requires replacement by another modem model.
Add, change, or cancel the service domain orders and product inventory.	A customer wants to change the characteristics value of a product or service. For example, the customers wants to change the Firewall Security Service from Standard to Basic.

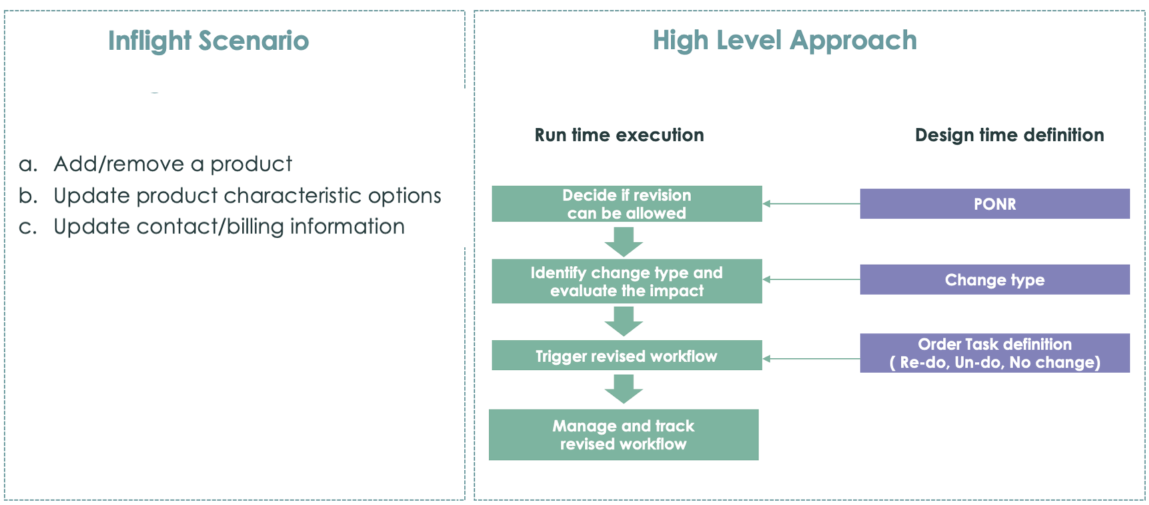
Fulfillment-driven order changes (continued)

Type of change	Example
Add, change, or cancel a service, including service options, in a related domain service order.	A customer wants to change the standard warranty of 90 days to an extended service policy.
Add, change, or cancel a resource, including resource options, in a related domain resource order.	Revised installation instructions are available for a product that the customer ordered.
Incorporate changes that are applicable to the related items and product inventory of a product or service order. To learn more, see #unique_175 and #unique_176.	A customer wants to add or change an item to an order that has horizontal relationships. To learn more, see Defining a horizontal relationship.

Inflight Order Change processing

When a user or order fulfillment manager attempts to make any of these changes, the Inflight Change Order function proceeds through a structured processing sequence as shown in the following diagram.

Inflight order change high-level approach



The sequence for inflight change order processing is as follows:

1. The Inflight Change Order function determines where in the processing cycle the order is. You can only create inflight order revision and cancellation requests for orders that are in an In Progress state.
2. The Now Platform then determines whether the proposed revision can safely be made to the in-progress order. It evaluates the Point of No Return (PONR) status for the order and its current stage in the fulfillment process.

   The PONR flag represents the no or go point at which you can't change an order:

   - You can make an inflight change only for order line items with an In Progress state.
   - You can't make inflight changes for an order that has already been decomposed into its domain product, service, or resource orders, and product installation has already started.

Note: You can find the **PONR** option when you are viewing or maintaining customer or service orders in the Customer Order and Order Line Item forms. To learn more, see:

- Select, review, revise, or request cancellation of a customer order and
- Reviewing the line items and related details for a customer order

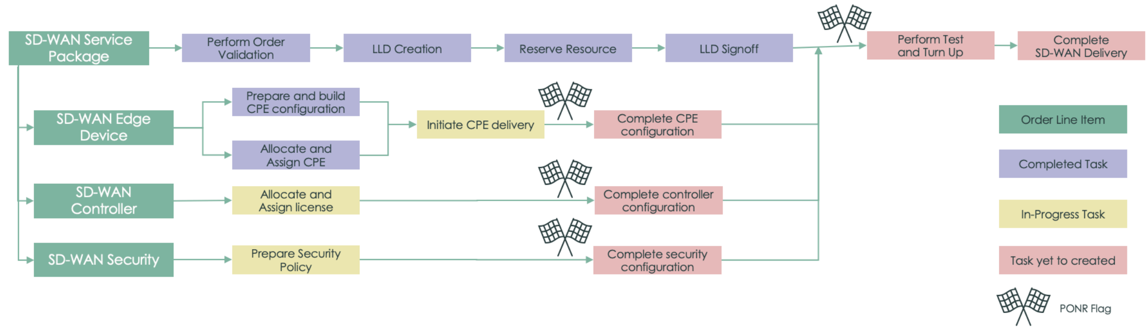
3. After an operator makes the requested changes, this functionality evaluates the type of change and its magnitude and impact on the fulfillment process as follows:
   - Simple informational changes, such as contact data, may or may not impact the fulfillment as configured in the orchestration plan.
   - If the customer requests to delete an ordered product or service, the impact of the changes, if permitted, would be greater, depending on its progress in the order fulfillment process.
4. The Now Platform then creates a compensation plan to trigger the tasks to fulfill the revised scope of the order as follows:
   - The compensation plan creates the automated revisions that are required to the fulfillment workflow to adjust to the requested order changes.
   - If the customer adds products or services to the order, the compensation plan generates additional order tasks to handle the fulfillment of the newly ordered items.
   - For a product substitution, the compensation plan generates an undo task to release the old product or service and a redo task for assignment of the new product or service. After the old product has been released, it can be sold to another customer.
   - For a product characteristic change, the compensation plan undoes some tasks to revert the work that is not applicable for a new characteristic value or option. The compensation plan can also include a few tasks that are required for some of the completed tasks. There could also be a few existing tasks that are unaffected by the revisions that were submitted as part of the order revision.

   Note: To learn more, see Configure order tasks to respond to inflight revision and cancellation requests.
5. A manager can then track the revised workflow. By using the Inflight Order Change functions, your organization can gain the following benefits:
   - Reduced manual intervention that is required to manage an inflight change order.
   - Reduced time to create a revised plan for a change, which results in faster order fulfillment cycles.

Inflight order change example

The following diagram shows the process where PONR occurs for order changes that were made for an SD-WAN Service Package and its related products.

SD-WAN Service Package inflight change orders



For the top-level SD-WAN Service package, the PONR only occurs before the testing and turn up stage. A customer or internal fulfillment personnel can't change the ordered item after that point.

For subordinate products, such as the SD-WAN Edge device, the order can be changed before the Customer Premise Equipment (CPE) configuration completes. If CPE delivery is initiated but doesn't complete, and a product substitution is requested, the Inflight Change Order function can do the following actions:

- Generate an undo task for the original item.
- Generate a redo task for the replacement item.
- Create undo and redo tasks for the Prepare and build CPE configuration and Allocate and Assign CPE tasks that are completed before revision. The Inflight Change Order function can generate these undo and redo tasks because the CPE delivery task is not complete for the replacement item.

After the CPE configuration is complete, no further changes are allowed in the order for that device. This scenario also applies to the SD-WAN Controller and SD-WAN Security selections.

Key inflight order change and cancellation request fields

Learn how the Now Platform uses key fields in the Customer Order and Order Line Item forms to track your order changes and cancellation requests. You can see how these fields operate and what information they show you when you revise or request a cancellation of an order, or order line items.

Overview

The **PONR** (Point of No Return) option on the Customer Order and Order Line item forms indicates the PONR state for the order or order line item. While fulfillment is in process, you can use the PONR option to determine if you can revise or request cancellation of an order or an order line item. You can only do these actions for orders and order line items that are in an In Progress state and have yet to reach the PONR stage.

Note: The **Revise Order** and **Cancel Order** buttons are enabled only for order or order line items in this state.

Learn what happens with the **PONR** option:

- If you select the PONR option, it indicates that you can't revise or request a cancellation for the order or order line item while fulfillment is in progress. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.
- If the check box is cleared, you can still revise or request a cancellation for the order or order line item.

Note: The **PONR** option is a system-assigned flag that you can't manually update.

By using the SET PONR action in Flow Designer, your administrator can manually configure the PONR state in the fulfillment workflow. For example, in the demo data for the SD-WAN Edge product specification workflow, the PONR action is available after the Initiate CPE delivery task.

Version

A customer or service order can go through multiple revisions during its fulfillment cycle. The **Version** field tracks the number of times that you revised or requested a cancellation of the order or order line item during the fulfillment process. A new order without any revisions has a version of 1 and automatically increments for each inflight revision.

Revision Operation

The **Revision Operation** field indicates the type of revision operation, if any, that is taking place in the current version of the order or order line item. The types of revision are as follows:

None

No update or cancellation is taking place for the order or order line item. This setting is the default for new orders and is applicable for orders without any Inflight revisions.

Update

A Contact, Characteristic, Quantity, or Price inflight revision has been submitted for the order or order line item.

Cancel

An order or order line item is canceled, or in the process of being canceled.

Change Type

When you submit an inflight order revision, the Now Platform automatically assigns a change type for the tracking of the order changes that are submitted by users. Characteristic, Contact, or Price types are standard in the Now Platform.

The change types are automatically assigned to the order or order line item when an order fulfillment or service order agent makes the following types of changes.

Assigned change types

Type of change made	Assigned change type
Changes any of the order characteristics. To learn more, see Review and update the characteristic values on a customer order.	Characteristic
Adds, changes, or deletes the order contact information. To learn more, see Review and update the contacts for a customer order line item.	Contact
Changes any price field. To learn more, see Reviewing the line items and related details for a customer order.	Price

Assigned change types (continued)

Type of change made	Assigned change type
Changes made to the order line item quantity for a product or service order. To learn more, see Order quantity support in Order Management.	Quantity
Changes made to the order line item quantity for a product or service order due to the change in characteristic value. To learn more, see Order quantity support in Order Management.	Quantity mapping characteristics
Changes made to the related order line items and related product inventory for a product or service order. To learn more, see #unique_174, #unique_175 and #unique_176.	Related items

Note: Your administrator can also define additional change types for tracking purposes. To learn more, see Create additional inflight order change types .

The related Inflight Order Line Item Changes [sn_ind_tmt_orm_inflight_order_line_item_change] table contains the following columns to track the revisions that were submitted for order line items.

Inflight Order Line Item Changes table columns

Column	Description
Order Line item	Identifier for the changed order line item.
Order Line version	Latest change version for the order line item. It tracks the number of times that you revised or requested a cancellation of the order line item during the fulfillment process.
Change Type	Type of change performed on the order line item. Characteristic Change made to any of the characteristics on an existing order line item. Contact Changes made to the contact information on an existing order line item. Price Changes made to the pricing information on an existing order line item. Quantity Changes made to the order line item quantity for a product order. Other change types

Inflight Order Line Item Changes table columns (continued)

Column	Description
	Additional change type that is defined by your administrator. To learn more, see Create additional inflight order change types .
Updated by	Name of the person who updated the order line item.
Updated	Date and timestamp for the order line item change.

State when initiating and approving inflight order revisions

When you initiate, and then approve, inflight order revisions, the affected order, order line items, domain orders, and order tasks go through different states.

When initiating an inflight order revision

To initiate an inflight order change, click **Revise Order** in the Customer Order form or in the Order Line Item form. The following actions take place:

1. The customer or service order moves from an In Progress to a Revision in Progress state.
2. The associated order line items move from an In Progress state to a Revision in Progress state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an inflight order revision

To approve an inflight revision, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The updated order and order line item information triggers the decomposition process as follows:
    - The decomposition process may create additional domain product, service, and resource orders to incorporate the characteristic changes that were submitted as part of an inflight order change.
    - It may also cancel existing domain orders that are not relevant to the requested change. For example, if a customer upgrades their purchased internet service to a higher speed, it would create a domain order for a modem that supports the higher speed service. It then would cancel the existing domain order for the modem that only supported lower speeds.
2. The customer or service order moves from a Revision in Progress state to an Acknowledged state. When the order decomposition is complete, it then moves back to an In Process state.
3. The associated order line items move from a Revision in Progress state to an Acknowledged state. When the order line item decomposition is complete, they then move back to an In Process state.
4. The associated product, service, and resource domain orders change from an On Hold state to a Scheduled state. The associated subflows change the state again during fulfillment processing.

New domain orders may also be created, based on the revisions that were submitted by the customers. They remain in either the Draft or the In Progress states, depending on the configuration of the fulfillment flow for the parent domain order.

5. The Now Platform refreshes the fulfillment flows for all the decomposed orders. The Now Platform also reassesses all order tasks, depending on the sequencing of the tasks in the corresponding fulfillment workflow. The associated order tasks then move to one of the states that are listed in the following table:

Assigned order task states

State	Description
Scheduled	An order task moves to this state and remains there until processed, as per the fulfillment workflow.
In Progress	If an order task was in an In Progress state at the time you initiated the inflight order revision, it remains in this state. If the task requires a re-execution to perform a redo or undo action, it can also move from a Closed state to an In Process state.
Closed Complete	If an order task was in a Closed Complete state at the time you initiated the inflight order revision, it stays in this state. It stays in this state as long as the task isn't in an inflight configuration due to other changes that were submitted as part of an inflight order revision.

6. After the order decomposition is complete and the fulfillment flow restarts, order fulfillment agents can go ahead and work on the associated order tasks to complete fulfillment.

State when initiating and approving order cancellation requests

When you initiate and approve an order cancellation request, the affected order, order line items, domain orders, and order tasks go through different states during processing.

When initiating an order cancellation request

To initiate a cancellation request, you click **Cancel Order** in the Customer Order form, or **Cancel Order Line Item** in the Order Line Item form. The following actions take place:

1. The order moves to an Assessing Cancellation state.
2. The associated order line items move to an Assessing Cancellation state.
3. The associated product, service, and resource domain orders move from their current states to an On Hold state.
4. The associated order tasks move to an On Hold state.

When approving an order cancellation request

To approve an inflight revision or cancellation request, an order fulfillment or service order manager clicks **Approve** in the Customer Order form. The following actions take place:

1. The decomposition process is triggered with the updated order and order line item information.
2. The order moves from an Assessing Cancellation state to a Cancellation in Progress state.
3. The associated order line items move to a Cancellation in Progress state.

4. The associated domain product, service, and resource domain orders move from their current state to an On Hold state.
5. The associated order tasks move to an On Hold state.

Related topics

Select, review, revise, or request cancellation of a customer order

Reviewing the line items and related details for a customer order

Select, review, revise, or request cancellation of a service order

Review the line items and related details for a service order

Revise an inflight order or request a cancellation in Order Management for Telecommunications, Media, and Technology

Revise an inflight order, or order line item, or request a cancellation of a customer order or a service order when a user requests it or your internal personnel determine an order revision or cancellation is necessary.

Before you begin

Role required: sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_manager

About this task

Order revision or cancellation is a two-step process. First, an operator makes the required updates or requests that an order or order line item is to be canceled. Next, when the order is created, an order fulfillment or service order manager approves the revision or cancellation request.

Procedure

1. Navigate to **All** > **Customer Order Management** > **Workspace** > **Configurable Workspace Home**.
2. Select, revise, or request a cancellation of the customer order, customer order line item, service order, or service order line item.

Type of order	Description
Select, open, revise, or request cancellation of a customer order, or order line item.	See Select, review, revise, or request cancellation of a customer order.
Select, open, revise, or request cancellation of a customer order, or order line item.	See Select, review, revise, or request cancellation of a service order.

Review and approve order revisions or cancellation requests

Review a customer or service order that has a pending revision or cancellation request so that you can make sure that the order is correct and complete. You can also approve the order and order line item revisions or cancellations requests.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_manage, sn_ind_tmt_orm.service_order_agent

About this task

When you approve a revised order, it enables it to continue in its modified state through the rest of the fulfillment process. When you approve a cancellation request, it finalizes the cancellation and prevents the order from continuing through fulfillment processing.
To learn more about how the states of orders change when you approve them, see Key inflight order change and cancellation request fields.

Procedure

1. Navigate to **All** > **Customer Order Management** > **Workspace** > **Configurable Workspace Home**.
2. Select the customer order or service order that you want to approve revisions or cancellation requests for.

Type of order	Description
Select and open a customer order	See Select, review, revise, or request cancellation of a customer order.
Select and open a service order	See Select, review, revise, or request cancellation of a service order.

3. In the customer order or service order, review the revision or cancellation request, and then click **Save** if you made any changes.
4. To formally approve the order revision or cancellation, click **Approve**.

Result

Orders with unapproved revisions have a Revision in Progress state. When you approve them, their state changes to In Progress. Orders with unapproved cancellation requests have an Assessing the Cancellation state. When you approve them, their order state changes to Cancellation in Progress.

Managing order fallout

Learn how Fallout Management enables you to identify, investigate, and resolve order issues so that orders can be processed to completion.

Overview

Order fallout refers to the failures that occur due to errors and exceptions that may take place during order fulfillment. These exceptions include the following:

- Incorrect data
- Connectivity problems
- Inadequate inventory supply
- Other unforeseen issues

Some issues could originate in inbound and outbound external systems that integrate with Order Management. A single order task can have multiple types of fallout issues.

The following table provides examples of fallout errors and exceptions that can occur during order processing:

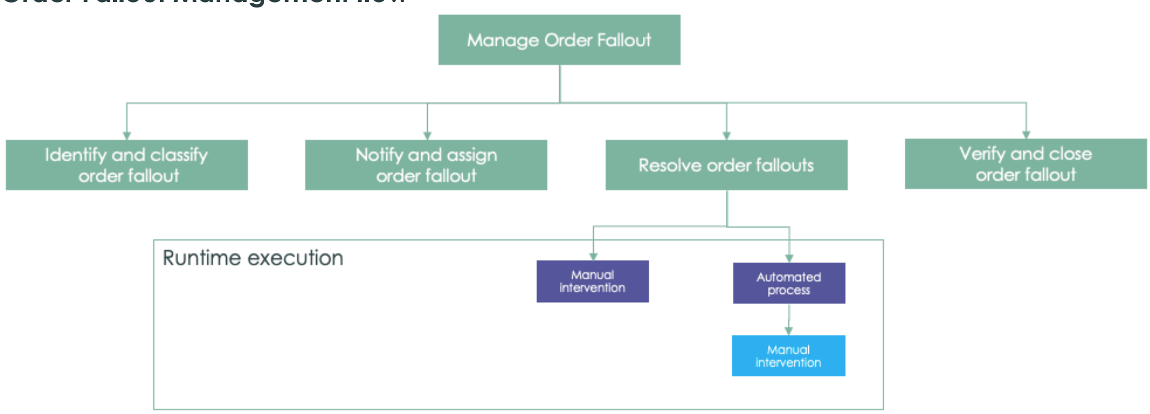
Fallout errors and exceptions

Type of failure	Description
Failures in downstream fulfillment systems	Fulfillment system can't process the request due to incorrect or missing data.
Failure to complete system interaction in a timely manner	Timeouts that occur during system interactions.
Failure in connection	• Network connectivity issue. • Unable to locate or route a request to a target system.
Unavailable inventory	Inventory stock isn't available in the Enterprise Resource Planning (ERP system) to fulfill certain items on the order.

Fallout Management functions

With Fallout Management, you can track each order fallout and automatically trigger the actions and interventions that can resolve your order fallout in a timely manner. The following diagram shows the order fallout management flow.

Order Fallout Management flow



Fallout Management enables you to identify the orders in a failed state. Fallout tasks can be triggered and automatically routed to the appropriate team to investigate, diagnose, and resolve the underlying issue that is stopping order fulfillment. With Fallout Management, you can identify, route, assign, manage, and monitor the entire life cycle of an order fallout.

Fallout Management tools

The Fallout Management function includes the following tools:

Order fallout tracking

With this tool, you can assign a unique number to each order fallout to track the progress of the fallout, from inception through resolution. By using an Order Fallout dashboard, a designated order fallout manager can view the status of all open fallout records. To learn more, see Review a fallout record.

Fallout resolution

With this tool, you can use the Now Platform features such as routing, notifications, and Flow Designer to process order fulfillment exceptions in an automated manner. To learn more, see Create automated and manual fallout records.

For example, your customer orders a router, but insufficient inventory quantities are available in your ERP system to reserve the item and fulfill the order.

- You create a fallout record for tracking and investigative purposes. This record places the customer order line item on hold.
- An order fulfillment agent can follow up to determine what is causing the shortage. It can be due to the unavailability of the host ERP system or because of an actual stock outage for the ordered item. If it's due to a stock outage, someone can take remedial action to contact the customer, reorder the item, or find a suitable replacement.

After you resolve the issue, you can restore the customer order line item back to a normal state for completion of the order.

Without a fallout management process, your order fulfillment personnel would have to analyze and resolve these fallout issues manually. These additional tasks would result in a longer fulfillment process and could lead to poor customer and employee experiences.

Creating automated and manual fallout records

With Fallout Management, a provider can create manual or automated fallout records for specific order tasks so that your orders can continue processing through to completion.

Creating automated fallout records

To enable creation of automated fallout records, you configure an order fulfillment workflow in the Flow Designer.

- To do so, use the **Create fallout** action when defining processing scenarios and conditions.
- You can define workflows for the parent records that the order tasks originate from. Generally, order tasks originate from the customer or service orders and order line items.

To learn more, see Flow Designer.

You might encounter the following scenarios when you are attempting to fulfill customer and service orders.

Scenarios of fallout failures with downstream systems

This fallout scenario could be a situation where failures are expected to be temporary and resolved over time. Ideally, order processing should not be affected, and work should resume after the network and system resources come back online. A typical scenario is as follows:

- The order task sends a request to an external or provisioning system.
- The response from the external system comes back as `Timeout` or `Unable to reach`.

You can requeue the task to be sent to the downstream system for processing, up to a pre-defined number of times. If the error persists after the predefined number of times, you should change the status of the order task to Failed, and then create an incident. You can define a workflow that automatically creates a fallout record whenever you send or retrieve order data to or from an external system that is not available.

Scenarios that involve data problems

If data problems originate with an order that you captured from an external order system, you should revise the order there. You then submit the revised order to the Order Management for Telecommunications, Media, and Technology application. If data problems originate with the tasks that are executed earlier in the process, you can do the following actions:

- Create an exception from the order task.
- Enable the revision of the existing order.
- Create an order task.

Inventory availability issues

You can define a workflow that automatically creates fallout records whenever inventory availability issues prevent the fulfillment of order line items.

External system issues

Even when the right data structure is submitted in an external system, errors can happen due to the business logic that is implemented in the external system.

Create a manual fallout record

Create a fallout record manually for an order task that has a condition or issue that prevents it from being completed.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager

About this task

You can create manual records as needed basis so that you can raise awareness of an issue or condition that is preventing order fulfillment. By creating a record manually, you can also assign it to a person for resolution.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. From the Configurable Workspace Lists icon (, click **Customer Orders**
   a. Click **Customer Orders** or **Service Orders**.
   b. Click **All** for all customer orders, or click **Open** for open, unfulfilled customer orders only.
3. Select and open an existing customer or service order.
4. To view the line item details, click **Order Line Items (n)** where (n) represents the number of the total number of line items for the order.
5. In the Order Line Items form, select the order line item that you want to review.
6. Click **Order Tasks (n)** where (n) is the number of order tasks that are associated with the selected order line item.
7. In the Order Tasks form, select the order tasks that you want to review.
8. When you finish updating the order task, or encounter issues preventing its closure, click the options icon (•••) next to the **Save** button and then click **Create Fallout**).
9. On the form, fill in the fields.

   For information about field descriptions, see the Create Fallout form fields section in Field descriptions for Fallout Management.
10. Click **Save**.

Result

When you create a manual fallout record, or an automated one is generated, the following occurs in the related order task:

- Its **State** field changes to On Hold, with a comment on which logged-in user caused it to change.
- In the Activity section, a work order note indicates that the order task state has changed from its former state, usually In Progress, to On Hold. A work order note with the message `A fallout record FOnnnn has been created` also appears.

Related topics

Fallout Management data model

Assigning order fulfillment and provider roles

Flow Designer

Flows

Create a flow

Review a fallout record

Review a fallout record to make sure that the detailed information is correct and complete.

Before you begin

Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task

You select fallout records to review in CSM Configurable Workspace. You can also review and track all fallout records for a specific order by using the **Fallouts (n)** icon where n is the number of fallouts. This icon appears when you view the related fallout record.

Procedure

1. Navigate to **All** > **Fallout Management** > **Workspace** > **Configurable Workspace Home**.

   Note: If you are not currently using configurable workspaces, navigate by using the following path:

   Workspace Experience > **Workspaces** > **Agent Workspace Home**.

   To learn more about migrating to configurable workspaces, see Migrate to Configurable Workspace

   If you have an assigned Fallout Manager or Fallout Agent role, the Fallout Management workspace appears. If the Fallout Management workspace does not appear, do the following actions:

   a. From the **Configurable Workspace Lists** icon ( ), click **Fallouts**.

   b. Do one of the following actions:

      - To view all fallout records, click **All**.
      - To view only those fallout records that are assigned to you, click **My Fallouts**.

      Note: To learn more about creating or updating fallout details, see Update a fallout record.

   c. Select the fallout record that you want to review:

      - To refresh the form, click the refresh ( ) icon.
      - To filter existing service orders, click the filter ( ) icon.

2. In the Fallout Management workspace, select the fallout record to review by selecting the appropriate tile.

   For information about field descriptions, see the Fallout workspace fields section in Fallout Management forms.

Update a fallout record

Review the detailed information for a selected fallout record to verify that the information is correct and complete. You can change the fallout type, state, or priority. You can even assign it to a specific person to follow up on.

Before you begin
Role required: sn_fallout_mgmt.fallout_manager, sn_fallout_mgmt.fallout_agent

About this task
If you have a fallout agent role, you can change the state of the fallout records, create work notes in them, or assign them to other users.

Procedure

1. On the form, review the fallout record that you selected.
   For information about the field descriptions, see the Fallout form fields section in Fallout Management forms .
2. In the Details pane, review the details of the fallout record:
   - To show the Details pane in the full screen, click the show form in full screen icon ().
   - To show the Details, Compose, Activity, and Attachments panes, click the show form and activity icon () (default).
   - To show the Activity pane in the full screen, click the show activity in full screen icon ().
3. Select **Save**.

View order timelines

View Gantt chart timelines that display the order status of domain orders and order tasks, show dependencies between order tasks, and identify tasks that are in jeopardy.

Before you begin
Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**.
2. Open the order that you want to view.
3. In the **Order breakdowns** section of the order, select **View order timeline**.
   The **Timeline** tab opens and displays the order tasks for the order line items and columns for the order task state and jeopardy status, if Jeopardy Management is enabled. Tasks in jeopardy are flagged with the jeopardy icon. For each task, a timeline shows the start and end dates of the task and any dependencies.
4. To change the information or elements displayed in the timeline view, review these options.

Option	Description
Add or change columns	**a.** Select the gear icon. **b.** In the **Columns** tab of the Personalize pane, select the items to display or de-select the items that are no longer displayed. **c.** Select **Apply**.
Change the timeline elements displayed	**a.** Select the gear icon. **b.** In the **Timeline** tab of the Personalize pane, select the items to display or suppress, such as Bar labels or Dependency lines. **c.** Select **Apply**.
Adjust the time scale used	In the time scale dropdown, select the time view, such as day, week month, or year. The time scale for the Gantt charts changes immediately.

Reviewing customer or partner accounts in Order Management for Telecommunications, Media, and Technology

Learn how your order entry and fulfillment agents, managers, and fulfillers can use the 360 View in the Order Management for Telecommunications, Media, and Technology application to get a better perspective about the activity that is associated with a customer's or partner's account.

Overview

As an order agent, manager, or fulfiller, you can use your customer's or partner's account Information to gain a clear understanding of the contact, order, customer service, product inventory, and installed base item activity for an account. With this information, you can track the following types of information:

- How many service contracts have been created or renewed for the account.
- How many customer and service orders have been submitted by the customer, and what are their current states of fulfillment.
- How many active requests or customer service cases the account has, and what are their current states.
- What products and equipment the customer has ordered or has installed at their sites. By using this information, your order agents can gain insights into what additional products or services they can sell to the customer.

Note: Most of the customer accounts in Order Management for Telecommunications, Media, and Technology are existing accounts that have been imported into the Now Platform from external order management systems via APIs. To learn how to create new customer accounts, see Configure accounts and contacts in Customer Service Management (CSM).

Review an account by using the 360 View

Review a customer or partner's account by using the 360 View in the Order Management application. You can track the service contracts of your customers or partners. You can also view customer and service orders, cases, products, and equipment to see how you can improve your customer service.

Before you begin

Role required: order_approver, order_viewer, sn_ind_tmt_orm.order-fulfillment_agent, sn_ind_tmt_orm.order_fulfillment_manager, sn_ind_tmt_orm.service_order_agent, or sn_ind_tmt_orm.service_order_manager

Procedure

1. Navigate to **All** > **Customer Order Management** > **Workspace** > **Configurable Workspace Home**.
2. From the **Configurable Workspace Lists** tab (), select **Customer**, and then select **Accounts**.
3. In the Accounts list, select a customer account.

   Note: You can also access an existing customer account by selecting a customer account link in the Account column of the Orders, Customer Orders, or Service Orders lists in the Configurable Workspace Lists.

4. In the Account Information form, in the Customer Summary section, review the general customer details for the selected account.

Account Information form - Customer Summary section

Field	Description
Account	Name of the customer or partner, and the name of the primary contact for the account. To view the details for the primary contact, including the account, title, email, phone numbers, and time zone, select the contact name.
Contacts	Name of each contact for the account. ◦ To access the Customer Contacts form so that you can view all contacts for the account, select **View All**. ◦ To view the details for a contact when you are in the Customer Contacts form, select the contact name.
Contracts	Name of the contracts, if any, that are associated with this account. ◦ To view the details for a contract, select the contract number. ◦ To view all contracts for the account, select **View All**.

5. In the Overview section, in the **Customer Orders** field, review the customer and service orders for the selected account.

Account Information form - Customer Orders section

Field	Description
Customer Orders (n)	(n) represents the total number of customer and service orders for this account.
Number	System-assigned identifying number for the order. ◦ To access the Customer Order form and view the order details for a customer order, select the order number. To learn more, see Reviewing customer (product) orders. ◦ To access the Service Order form and view the order details for a service order, select the order number. To learn more, see Reviewing service orders. ◦ To access the Customer Orders form to view all orders for the account, select **View All**. To view the detailed information for an order when you are in the Customer Orders form, select the order number.
Order Type	Type of order: Product Order for a product that you sell. To learn more, see Creating, changing, and cancelling manual product orders. Service Order for a product that you sell. To learn more, see Creating, reviewing, approving, and fulfilling service orders.
Contact	Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name.
State	State of the product or service order. To learn more, see these two topics: ◦ Customer order states ◦ Service order states.

6. In the Cases section, review the customer service cases, if any, for the selected account.

Account Information form - Cases section

Field	Description
Number	System-assigned identifying number for the customer service case: ◦ To view the details for a customer service case, select the case number. ◦ To view all the customer service cases for the account, select **View All**.
Short description	Short description of the customer service case.
Contact	Name of the customer contact that is associated with the customer service case. To view the details for the contact, select the contact name.
State	State of the customer service case. To learn more, see Case states.

7. In the Product Inventory section, review the product inventory items for the selected account.

Account Information form - Product Inventory section

Field	Description
Product Inventory (n)	(n) represents the total number of the product inventory items that were ordered for this account.
Number	System-assigned identifying number for the product inventory item: ◦ To view the details for a product inventory item, select the product inventory number. ◦ To view all the product inventory items for the account, select **View All**.
Specification	Product specification that is associated with the product inventory item. To view the details for a specification, select the specification number.
Location	Current location for the product inventory item. *(empty)* denotes that the product inventory item hasn't yet been installed at the customer site.
State	State of the product inventory item. *Installation Pending* denotes that the installation of the product inventory item is pending at the customer site.

8. In the Installed Base Items section, within the Product Inventory section, review the installed base items for the selected account.

Account Information form - Installed Base Items section

Field	Description
Installed Base Items (n)	(n) represents the total number of the base items that were installed for this account.
Number	System-assigned identifying number for the installed base item: ◦ To view the details for an installed base item, select the installed base item number. ◦ To view all the installed base item numbers for the account, select **View All**.
Configuration Item	System-assigned identifying number for the configuration that is associated with the installed base item. To view the details for a configuration item, select the configuration item number.
Contact	Name of the customer contact that is associated with the order. To view the details for the contact, select the contact name.

Monitoring Jeopardy Management

Order managers and agents can monitor jeopardy-enabled fulfillment tasks. When a task enters jeopardy, managers can take action to ensure the fulfillment workflow isn't delayed.

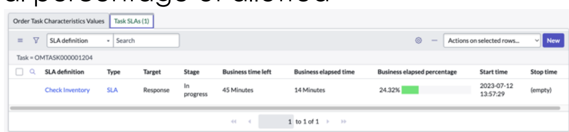
When Jeopardy Management is added to fulfillment task flows, Jeopardy Management tracks the time to complete tasks and creates a predictive assessment of the risk level to the fulfillment plan. If a task is taking longer than the defined time, jeopardy alerts are shared.

The following table describes where you can view the jeopardy status.

Jeopardy status alerts

Jeopardy status	Description
In Jeopardy enabled order forms, look for the **Jeopardy Level** column	Look for jeopardy status in the **Jeopardy Level** column of the order status form. Jeopardy levels include Low, Medium, High, and Critical.
Order Orchestration View	Navigate to **Customer Order** > **Order** > **Order Line Item** > **Orchestration**. Each Orchestration tile shows the task and Service Level Agreements (SLA) progress.
SLA Definition Progress Bar	Navigate to **Customer Order** > **Order** > **Order Line Item** > **Task** > **SLA** and view the status bar. The status bar shows the SLA progress, for example:

Jeopardy status alerts (continued)

Jeopardy status	Description
	• Green: SLA progressing on its time line. • Red: tTask is near the end of the critical percentage of allotted time. 

Integrating Order Management with other applications

You can extend the capabilities of Order Management when you integrate it with other applications.

You can integrate Order Management with the following applications:

- Integration with Field Service Management: Create field service work order requests automatically with Order Management, and track them in Field Service Management.
- Integration with Service Portfolio Management: Provide project oversight of complex, long-running orders and order tasks in Order Management, and manage them in Service Portfolio Management.

Order Management integration with Field Service Management

Provides an integration between the Order Management and the Field Service Management applications. This integration is available to all ServiceNow customers with the Order Management (com.sn_ind_tmt_orm) plugin, Field Service Management Configurable Workspace (com.snc.uib.fsm_agent_workspace) plugin, and Field Service Management (com.snc.work_management) plugin.

Overview

This integration enables automatic and manual creation of work orders from the Order Management application to the Field Service Management application. This integration ensures collaboration between the Order Management and the Field Service Management applications to support the end-to-end order fulfillment process. Work orders are created for an order that requires field service work by field agents. The order fulfillment agents and managers can more efficiently manage order tasks and work order dependencies.

Key features

- Automation of work order creation, updates, and tracking.
- UI-based manual triggering of work order to Field Service Management. Schedule field service work and communicate work note updates to field service dispatchers and agents.
- Synchronization of information between Order Management and Field Service Management for status, work note, customer details, and other updates.
- Tracking and managing the end-to-end workflow of orders and associated work orders in the fulfillment process.

Configuring automatic creation of work orders

You can enable automatic creation of work orders from Order Management for Telecommunications, Media, and Technology to Field Service Management. Work orders are created for domain orders and order tasks. To configure the automatic creation of work orders, configure the decision tables in the decision builder.

Customer orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table.

After an order is approved by the manager, a work order is automatically created if the conditions that are defined in the decision builder are met. If required, the manager can also select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Configure work order creation for a domain order

Add a condition in the decision tree for automatic creation of work orders for domain order. The conditions are specified in the Work Order Policy for Domain Order decision table.

Before you begin

Role required: admin

About this task

Customer Orders have multiple order line items that have multiple domain orders, such as product orders, service orders, resource orders, and order tasks. For automatic creation of work orders for a domain order, the conditions are specified in the Work Order Policy for Domain Order decision table. For conditions not defined in the decision table, the manager can select **Create Work Order** to create a work order manually. The work order template in the decision table pre-populates the fields of the automatically created work order.

Procedure

1. Navigate to **All** > **Decision Builder**.
   You can view all the decision tables.
2. Select the **Work Order Policy for Domain Order** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select an action from the Domain Order Action list.
5. Select a template for the condition in the **WO Template** column.
6. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision table is met, a work order is automatically created for a domain order. For information, see Decision Builder.

Configure work order creation for order task

Add a condition in the decision tree for automatic creation of work orders for order tasks. The conditions are specified in the Work Order Policy for Order Task decision table.

Before you begin

Role required: Administrator

About this task

For the automatic creation of work orders for order tasks, the conditions are defined in the Work Order Policy for Order Task decision table. After an order is approved by the manager, a work order is automatically created if the conditions are met that are defined in the decision builder.

Procedure

1. Navigate to **All** > **Decision Builder**.
   You can view all the decision tables.
2. Select the **Work Order Policy for Order Task** decision table.
3. In the **Specification** column of the conditions section, select the service package to set a condition.
4. Select **Add** for Domain Order Action.
5. Select a Request type for the order task in the **Request Type** column.
6. Select a template for the service package in the **WO Template** column.
7. Select **Save**.

Result

A condition is added in the decision table. If this condition in the decision tree is met, a work order is automatically created for an order task. For information, see Decision Builder.

Synchronization of information between Order Management for Telecommunications, Media, and Technology and Field Service Management - Workflow scenario

The integration between Order Management for Telecommunications, Media, and Technology and Field Service Management provides support for the end-to-end order fulfillment process. The following scenario shows the seamless synchronization of data, customer information, status, and other updates between Order Management for Telecommunications, Media, and Technology and Field Service Management.

Scenario

After the order fulfillment manager approves the order in Order Management for Telecommunications, Media, and Technology, work orders are automatically created in Field Service Management for conditions that are specified in the decision tree. As the field service agents work on those work orders, the order fulfillment agent can see the updates in the Work Notes section of that Domain Order. An agent cannot close a domain order unless all the work orders associated with it are closed. This workflow shows synchronization of information between Order Management for Telecommunications, Media, and Technology and Field Service Management.

1. An order fulfillment agent creates a new customer order in the Order Management for Telecommunications, Media, and Technology workspace.
2. The agent then selects the location for which the order needs to be placed. For multiple locations, multiple order line items are created.
3. The agent then reviews and places the order.
4. The order fulfillment manager approves the order. The order line items have domain orders as part of the order fulfillment flow. According to the configurations in the decision table, work orders are automatically created in Field Service Management.

5. The agent can view the work orders created for the domain orders in the **Details** tab. In the Activity section, the agent tracks all the updates for the work orders in the work notes.
    - When the status of a work order changes in Field Service Management, the details are displayed in the work notes of the Order Management for Telecommunications, Media, and Technology workspace.
    - If a work order is canceled, the work order status is displayed in the Order Management for Telecommunications, Media, and Technology work notes section.
    - In case of inflight changes, the work order is automatically updated. The current status and the updated information are displayed in the work notes section.
6. The agent can edit an order line item if required. If the agent selects the **PONR** (Point of No Return) option, no changes can be made to the order line item in the workflow anymore.
7. After all the work orders are closed, the order fulfillment manager can review the all the work orders and close the domain order.

    Note: The agent cannot close a domain order unless all the work orders associated with that domain order are closed.

Order Management integration with Strategic Portfolio Management

The Order Management application provides an integration with the ServiceNow® Strategic Portfolio Management (SPM) application enables project oversight of complex order fulfillment tasks. Use this integration to handle order line items and planned order tasks as projects in SPM.

Features

- Automates the creation of SPM projects based on project oversight rules, enabling project managers to track order fulfillment activities within a project in SPM.
- Synchronizes order fulfillment tasks in Order Management to an associated project in SPM, providing project managers with real-time task activity updates via state change information, notes, and comments.
- Enable fulfillment agents, managers, and project managers to view related lists that show the relationship between an order line item and project, domain order and project task, and order task and project task.
- Supports tracking and synchronization of one or more order tasks.
- Supports staggered/in-flight orders for new tasks created as part of staggered decomposition or in-flight changes. Uses predefined planned order tasks that enable synchronization between order fulfillment and project tasks.
- Closes project tasks automatically when child tasks and associated order tasks or domain orders are completed or canceled.

Benefits

- Gives project managers end-to-end project oversight of complicated orders, such as long-running orders that require delivery to a specific customer account with multiple locations.
- Manages risks by identifying issues that affect project dependencies and timely order fulfillment.
- Eliminates manual tracking of order status between SPM and Order Management applications. Reduces inefficient communication between project managers, fulfillment agents and managers, and other project stakeholders.

How the SPM integration works

The Order Management integration with Strategic Portfolio Management uses the Project Portfolio Management (PPM) standard application in SPM to track fulfillment tasks as projects in your organization. This integration also works with the Customer Project Management application if you want to track customer order fulfillment tasks as customer projects automatically.

Configuration

Admins set up the SPM integration by configuring these items:

- Project templates: Create the PPM project templates that are used to generate the SPM projects automatically for orders requiring project oversight. Project templates also define the planned tasks for order delivery.
- Order Management project oversight conditions and rules: Set the conditions and decision rules that determine the orders that qualify for project oversight and the project templates used to create those projects. You use different Project Management Oversight decision tables to specify the conditions and rules for order lines, domain orders, and order tasks and the appropriate project template to be used.
- Field mapping in CSM table maps: Associate Order Management fields to SPM project fields by configuring the field mapping in the CSM table maps.
- Property for automatic closure of project tasks: Control the automatic closure of project tasks when associated child tasks are completed by using the `sn_ind_tmt_orm.project.task.auto.closure` system property.

SPM integration flow

After an order line is created and approved, Order Management performs the following processing steps.

- Project oversight determination: Qualifies the order line for project oversight.
  - Checks that the order line is valid and that the PPM Standard application is installed.
  - Reviews the project oversight conditions and decision rules for order lines.
  - If the order line matches the conditions, automatically creates the project and project tasks using the specified project template.

  Note: If multiple order lines are eligible for oversight, the system creates multiple projects.

- One-time synchronization: Synchronizes the order line with the project, establishing the relationship between the order line and the project.

- Project task oversight determination: After Order Management decomposes the order line item into domain orders and order tasks, it does the following:
    - Checks the project oversight conditions for domain orders. If a domain order meets the project oversight conditions, creates the associated project and planned tasks using the project template task specified.
    - Checks the project oversight conditions for order tasks. If order tasks meet the project oversight conditions, creates the associated project and planned tasks using the project template task specified.
    - Links domain orders and order tasks back to the parent project, synchronizing attributes from the domain orders and order tasks to the project tasks.
- Order task state changes: As order task states change in Order Management, synchronizes the state and status with corresponding project tasks in SPM so that project managers and other project stakeholders can view the changes in real time.
- Updates to project notes and comments: Automatically updates project notes and project task notes when fulfillment managers or agents post work notes and comments in order line items, domain orders, and order tasks.
- Project task closure: Automatically closes project tasks for order tasks, including child tasks, that have been completed in Order Management.

Plugins for the SPM integration

The SPM integration is included with the Order Management application. The integration requires the following plugins, which are activated by users with the admin role:

- PPM Standard plugin (com.snc.financial_planning_pmo): Activates the Project Portfolio Management Standard application, which installs Financial Management and the Project Portfolio Suite. The suite includes various applications for handling projects in your organization, such as Program Management, Project Management, and Demand Management. For more information on the Project Portfolio Suite, see Project Portfolio Suite with Financials.
- Customer Project Management plugin (com.snc.csm_ppm): Activates the Customer Project Management integration with the PPM Standard application. This integration enables customer project managers to create and manage complex projects with multiple tasks. This integration also provides end users with visibility into those projects. For details on Customer Project Management, see Integrating with Customer Project Management.

Access controls in the SPM integration

The SPM integration supports certain access controls for users with the following roles.

SPM integration access controls

Role	Access controls in SPM integration	Contains roles
• Order fulfillment agent [sn_ind_tmt_orm.order-fulfillment_agent] • Service order agent [sn_ind_tmt_orm.service_order_agent]	Order fulfillment agents have read access to product orders, product order tasks, service orders, and resource orders. Service order agents have read access to service order requests, service orders, resource orders, and related fulfillment tasks. Agents have access to the following project information: • Read access to the Project form fields. • Read access to the Order Line Item to Project Relationship table. • Read access to the Order Line Item and Order Task related lists in PPM. • Read access to the Order task to Project Task related list in Order Management.	• it_project_user • sn_customerservice.projectmanager (if using Customer Project Management)
• Order fulfillment manager [sn_ind_tmt_orm.order_fulfillment_manager] • Service order manager [sn_ind_tmt_orm.service_order_manager]	Order fulfillment managers receive orders, review order line items, verify that orders are ready for fulfillment, and then approves orders. Service order managers ensure that service orders are ready for fulfillment and then approve them. Managers can: • Post notes and comments on order lines and order tasks to communicate with the project manager. • View the relationship between a project and an order line item, project tasks, and order tasks. Managers have the following access to project information:	sn_ind_tmt_orm.order_creator

SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles
	◦ Read access to the Order Line Item to Project Relationship table. ◦ Read access to the Order Line Item and Order Task related lists in PPM. ◦ Read access to the Order task to Project Task related list in Order Management.	
IT project user [it_project_user]	• Read access to the Project form fields. • Read access to the Order Line Item to Project Relationship table. • Read access to the Order Line Item and Order Task related lists in PPM. • Read access to the Order task to Project Task related list in Order Management. • Read access to the Project Template Creation table.	sn_ind_tmt_orm.order_viewer
IT project administrator [it_project_admin]	• Configure access to all Project Management features. • Read and write access to the Project Template Creation table. • Read and write access to the Order Line Item related list in PPM. • Write access to the Order Task related list in PPM. • Read access to the Order Line Item to Project Relationship table. • Write access to the Order task to Project Task related list in Order Management.	• it_project_user • sn_ind_tmt_orm.order_creator
Administrator [admin]	• Creates the PPM project templates used to generate the projects for orders that require project oversight automatically. • Configures the mapping between order tasks and	

SPM integration access controls (continued)

Role	Access controls in SPM integration	Contains roles
	planned project tasks associated with project templates • Specifies the conditions and decision rules for determining project oversight and the project templates used to create those projects. • Controls automatic closure of project tasks	

Next step

As an admin, review the setup tasks in Configuring the Strategic Portfolio Management integration.

Configuring the Strategic Portfolio Management integration

Configure the Strategic Portfolio Management integration so that order delivery tasks in Order Management can be tracked as planned project tasks in SPM.

As an admin, follow these tasks to set up the SPM integration.

Configuration step	Description
Activate PPM Standard (Project Portfolio Management)	Install the PPM Standard (com.snc.financial_planning_pmo) plugin. If you're tracking customer projects, you must also activate the Customer Project Management (com.snc.csm_ppm) plugin. For information on setting up Customer Project Management, see Integrate with Customer Project Management using Guided Setup. **Note:** If you installed the Order Management application before activating the PPM Standard or Customer Project Management plugins, you must repair the Order Management (com.sn_ind_tmt_orm) plugin to get the plugin-dependent updates and demo data for the SPM integration.
Create project templates and project template tasks	Use the Project Portfolio Management application to create the project templates for order lines and project template tasks for domain orders and order tasks.

Configuration step	Description
Configure field mapping between orders and projects	Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in SPM.
Set up project oversight conditions and decision rules	Configure the conditions and decision rules for determining the order lines, domain orders, and order tasks that qualify for project management oversight. You also specify the project templates to be used to create those projects.
Control the automatic closure of project tasks	Manage the automatic closure of project tasks when related child tasks are completed or cancelled.

Creating project templates and project template tasks

You create the project templates and project template tasks that Order Management uses to instantiate projects for order lines and associated domain orders and order tasks.

In the SPM integration, project templates define the structure of a project for order lines and the project planned tasks that map to the order fulfillment tasks for the order line. You specify project templates and project template tasks in the project oversight decision rules. Order Management uses these rules to determine which order items require oversight and the project template or project template tasks used to create the projects.

As an admin or user with the it_project_manager role, you create project templates and the project template tasks in Project Portfolio Management. For more information, see Project templates and Create a project template. The demo data with the Order Management application includes project templates that you can copy and change as needed.

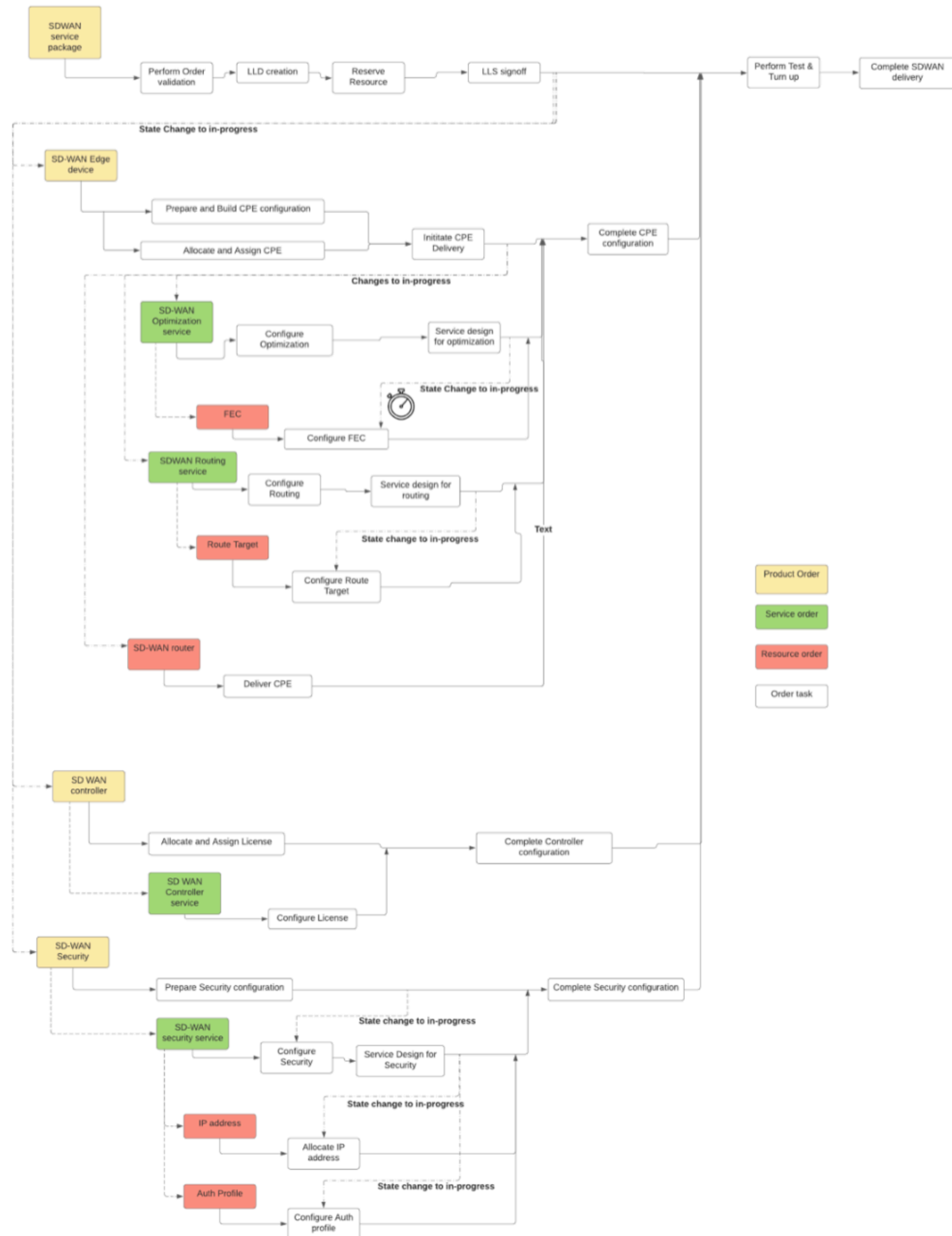
Note: When you create project template tasks for domain orders and order tasks, be sure to anticipate inflight changes that may require additional planned tasks. Define those potential planned tasks in the template tasks so that the system can synchronize the planned tasks with the additional order tasks resulting from inflight changes in Order Management.

The demo data for the Order Management application includes project templates that you can copy and change as needed.

Before creating project templates and project template tasks

Before you create your project template and project task templates for the SPM integration, consider the level of project oversight required for customer orders to be fulfilled. For example, in the following SD-WAN fulfillment flow, the top order line is SD-WAN Service Package, which defines the order line project to be created. Next, identify the domain orders and then the order tasks that require project task oversight.

SD-WAN fulfillment flow



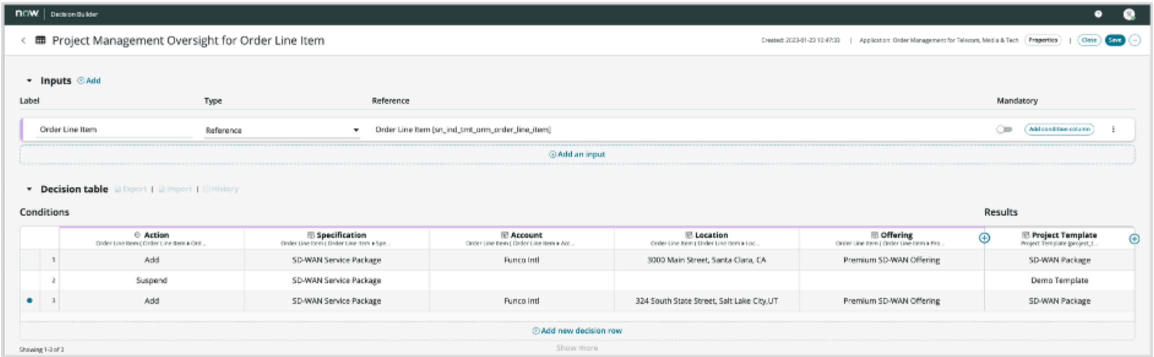
Setting up project oversight conditions and decision rules

As an admin, you create and maintain the conditions and decision rules that determine whether an order item qualifies as a project that can be tracked in Strategic Portfolio Management. You also specify the project template that Order Management uses to create that project for the order item.

Set the conditions and decision rules for project oversight of order lines and associated domain orders and order tasks by using Decision Builder forms for order lines, domain orders, and order tasks. These forms have a decision table for specifying the conditions and rules to be applied when Order Management determines eligibility for project oversight.

For example, in the Project Oversight Management for Order Line Item form, you use the decision table to add or change condition columns. You also specify the decision rules, including the project template, to be applied.

Project Management Oversight for Order Line Item



For more information on adding or changing conditions in decision tables, see Creating decision tables in Decision Builder and Modifying decision tables in Decision Builder.

Note: If Order Management demo data is installed, the decision table for each project oversight form displays the condition columns and the decision rows added for demo data. You can add, change, or delete the condition columns and decision rows as needed.

Configure project oversight for order lines

Specify the conditions and decision rules that qualify an order line for project oversight. You also specify the project template used by Order Management to create the project for the order line.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Line Item Decision Builder to add or change the conditions and decision rules that must be met for an order line to be tracked as a project. For example, if you want projects to be created for order lines that have a particular product, customer account, and location, you can add condition columns for **Specification**, **Account**, and **Location**.

Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Order Line Item** decision table.
   The Order Line Item is displayed in the **Inputs** and the **Project Template** column in the **Results**.
3. Add a condition that an order line must match.
   a. Select **Add Condition column**.
   b. On the form, fill in the fields.

New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For order line items, the table is Order Line Item [sn_ind_tmt_orm_order_line_item].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select **Field** and choose a field from the Order Line Item table, such as **Account**, to specify a customer account.
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions that the order line must match and the project template for creating the project.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template to create projects for order lines that match the conditions and decision rules defined in the Project Oversight for Order Line Items decision table.

Configure project oversight for domain orders

Specify the conditions and decision rules that qualify domain orders for project oversight. You also specify the project template task used by Order Management to create the project for domain orders.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Domain Order Decision Builder to add or change the conditions and decision rules that a domain order must meet to be tracked as a project. For example, if you want projects to be created for domain orders for a particular product, you can add a condition column for **Specification**.

Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
   The Domain Order item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.

   a. Select **Add Condition column**.

   b. On the form, fill in the fields.

   New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Domain Order [sn_ind_tmt_orm_domain_order].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select **Field** and choose a field from the Domain Order table, such as **Specification** (Domain Order.specification) to specify a product.

Field	Description
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions and project template task to be used.

Note: If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template tasks. For details on differentiating between similar project template tasks, see Choosing a project template task when duplicates exist.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

Result

The system uses the specified project template task to create projects for domain orders that match the conditions and decision rules defined in the Project Oversight for Domain Order decision table.

Configure project oversight for order tasks

Specify the conditions and decision rules that qualify order tasks for project oversight. You also specify the project template task used by Order Management to create the project for order tasks. The project template task defines the project tasks for the order tasks.

Before you begin

Role required: admin

About this task

Use the Project Management Oversight for Order Task Decision Builder to add or change the conditions and decision rules that an order task must meet to be tracked as a project. For example, if you want projects to be created for order tasks for a particular request type, you can add a condition column for **Type**.

Procedure

1. Navigate to **All** > **Decision Management** > **Decision Builder**.
2. Select the **Project Management Oversight for Domain Order** decision table.
   The Order Task item is displayed in the **Inputs** and the **Project Template Task** column in the **Results**.
3. Add a condition that a domain order must match.

a. Select **Add Condition column**.

b. On the form, fill in the fields.

New Condition Column form

Field	Description
Condition column label	Label for the column.
Description	Brief overview of the condition.
Input	Input linked to the condition column. To evaluate multiple fields, you can add multiple conditions with the Reference input type.
Table	If the data type is Reference, the name of the reference table is displayed. For domain items, the table is Order Task [sn_ind_tmt_orm_order_task].
Data to evaluate	For condition columns with the input type of Reference, specifies whether the condition column evaluates the reference record or a field on the reference table. To evaluate a particular field, select **Field** and choose a field from the Order Task table, such as **Request Type** (Order Task.request_type) to specify a request type.
Condition type	Data type selected for the condition column.
Default operator	How every row in the condition column evaluates a user-specified value. A default operator is required for all input data types except for True or False.

c. Select **Save**.

d. Repeat steps 3a through 3c for each condition to be added.

4. Enter a decision rule by selecting **Add new decision row**.

a. Select the **Add** action and enter the conditions and project template task to be used.

Note: If there are duplicate project template tasks that have the same **Short description**, it may be difficult to identify and select the appropriate project template task. For details on differentiating between similar project template tasks, see Choosing a project template task when duplicates exist.

b. Select **Save**.

c. Repeat steps 4a through 4c for each decision rule to be added.

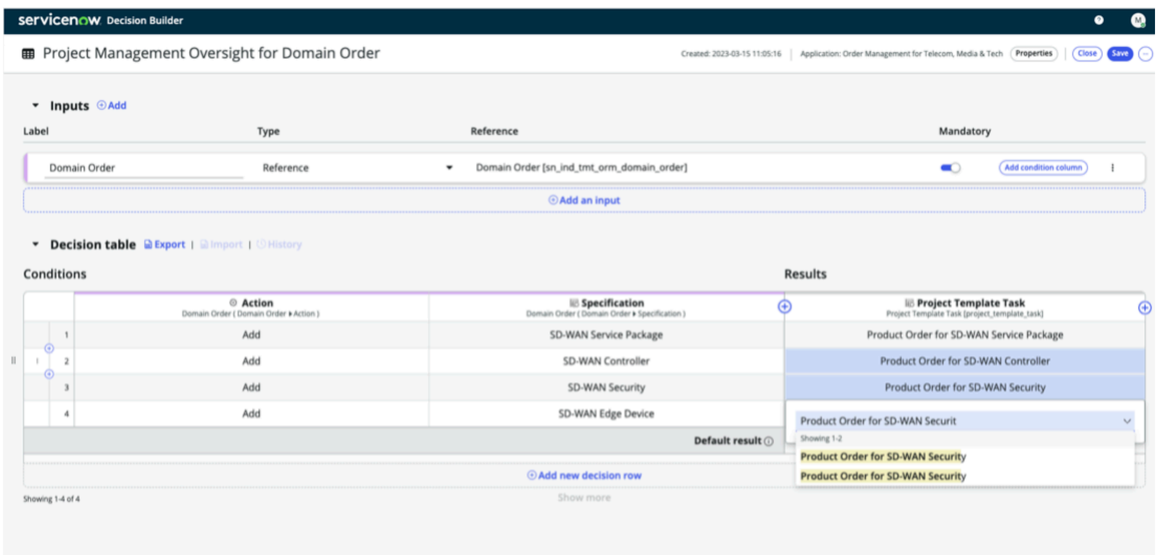
Result
The system uses the specified project template task to create projects for order tasks that match the conditions and decisions rules defined in the Project Oversight for Order Task decision table.

Choosing a project template task when duplicates exist

As an admin, when you're configuring the decision rules for domain orders and order tasks, you may find that there are multiple project template tasks with the same **Short description**. It may be difficult to determine the correct project template task to select.

For example, the following decision table for Project Oversight for Domain Order shows two options with the same name for the project template task: Product Order for SD-WAN Security. This project template task has the same **Short description** for two different project template tasks, one for SD-WAN Package and the other for SD-WAN Customer Product Bundle.

Duplicate project template tasks in Project Management Oversight for Domain Order



You can determine the appropriate project template task by finding and verifying the sys_id of the project template task to be used. For more information, see Verify the sys_id of a project task template.

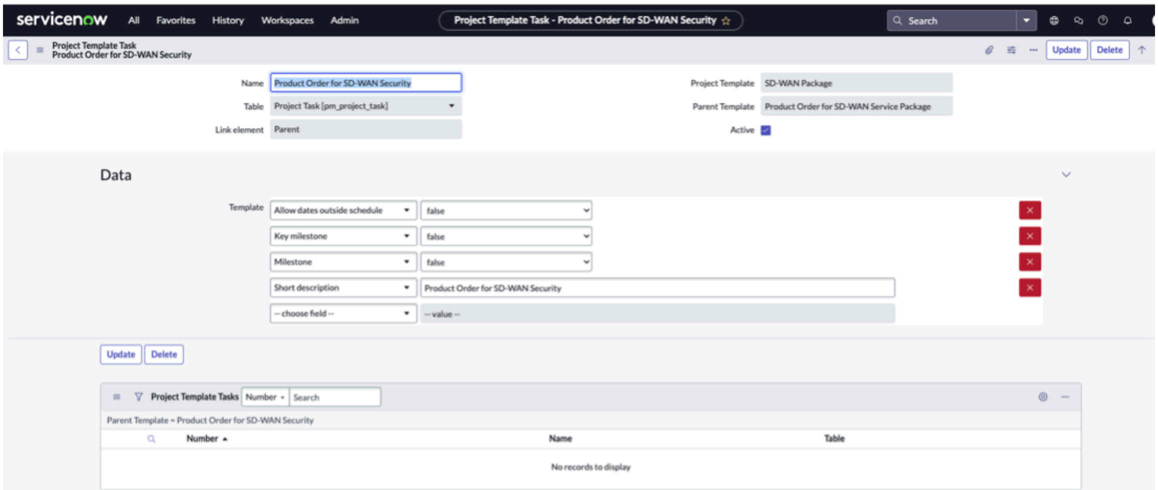
Verify the sys_id of a project task template

Determine if you're using the correct project task template for domain orders or order tasks by checking the sys_id of the project template task.

Before you begin
Role required: admin

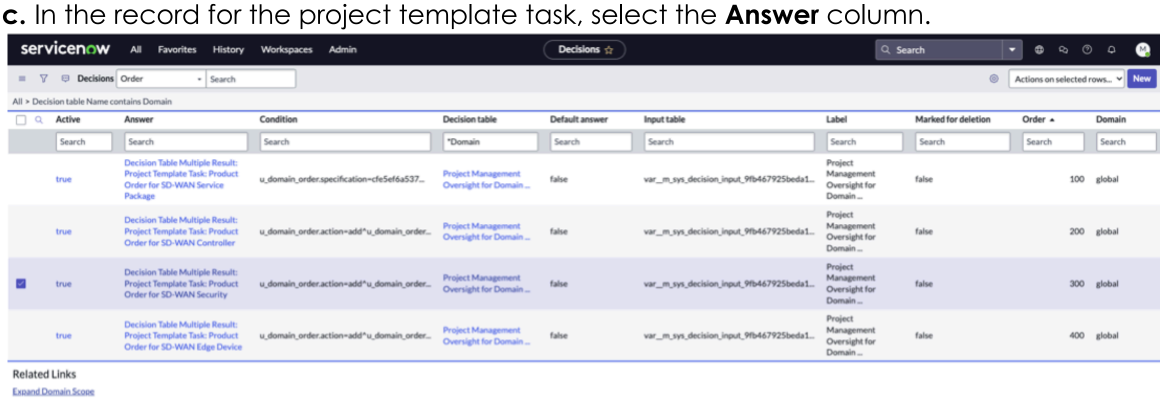
Procedure

1. Navigate to **All**, and in the filter enter `project_template_task.list`.
2. Select the record for the project template task to be verified, and get the sys_Id from the header bar.

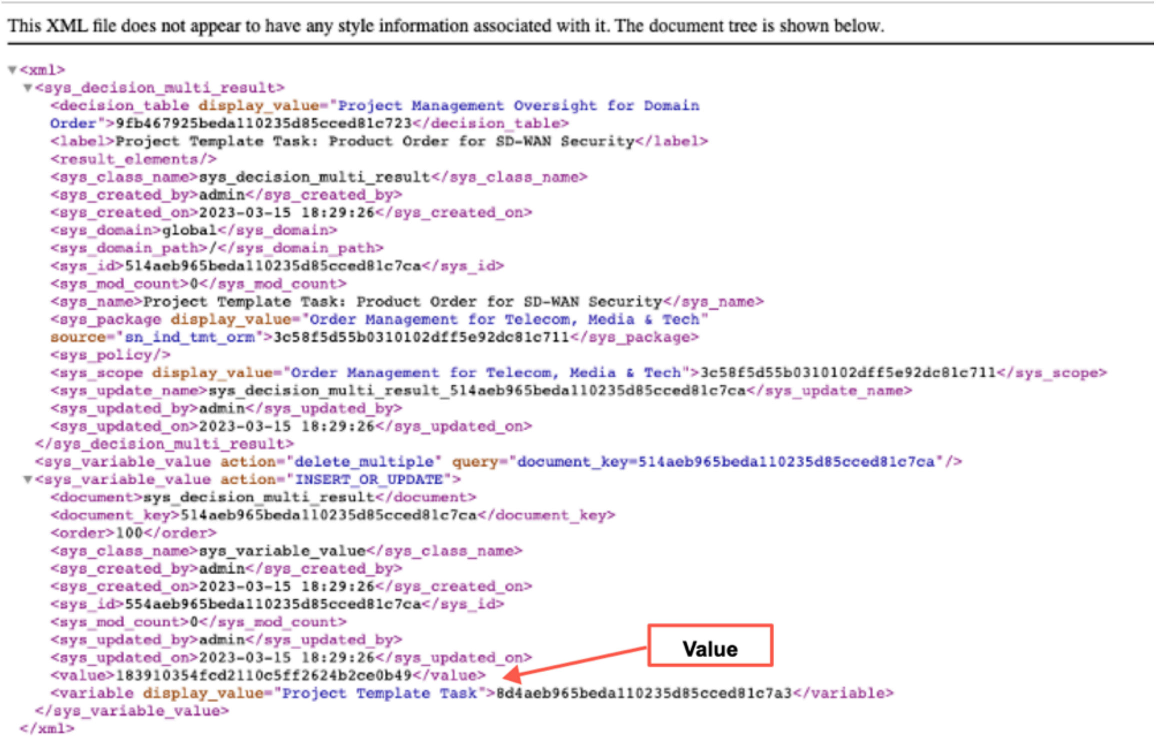
   For example, in the Project Template Task record for Product Order for SD-WAN Security, which belongs to the SD-WAN Package project template, the sys_id is 183910354fcd2110c5ff2624b2ce0b49.

3. Check the value of the sys_id in the associated Decisions table entry.
   a. Navigate to **All** and in the filter, enter `sys_decision_question.list`.
   b. In the Decisions [sys_decision_question] table, locate the record of the corresponding decision table entry, for example Project Management Oversight for Domain Order.
   c. In the record for the project template task, select the **Answer** column.

   The resulting record for the **Answer** field opens.

4. In the resulting record for the Decision Table Multiple Result, view the XML output by right-clicking the header bar of the record and selecting **Show XML**.
5. Review the XML and locate the sys_id value in the file.

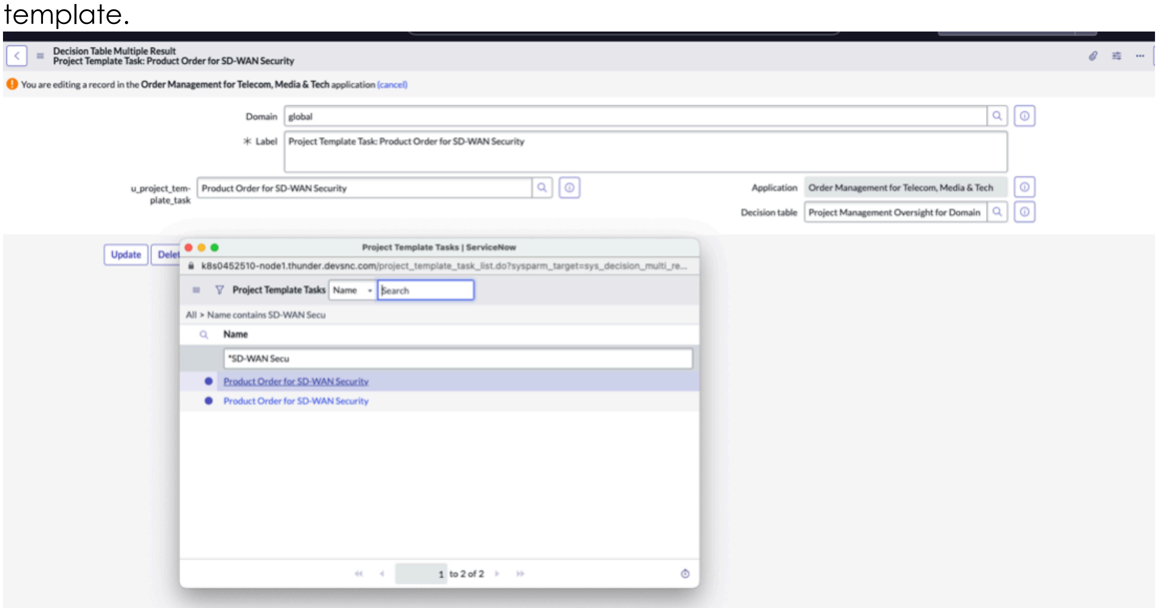


This XML file does not appear to have any style information associated with it. The document tree is shown below.


```
▼<xml>
 ▼<sys_decision_multi_result>
    <decision_table display_value="Project Management Oversight for Domain
    Order">9fb467925beda110235d85cced81c723</decision_table>
    <label>Project Template Task: Product Order for SD-WAN Security</label>
    <result_elements/>
    <sys_class_name>sys_decision_multi_result</sys_class_name>
    <sys_created_by>admin</sys_created_by>
    <sys_created_on>2023-03-15 18:29:26</sys_created_on>
    <sys_domain>global</sys_domain>
    <sys_domain_path>/</sys_domain_path>
    <sys_id>514aeb965beda110235d85cced81c7ca</sys_id>
    <sys_mod_count>0</sys_mod_count>
    <sys_name>Project Template Task: Product Order for SD-WAN Security</sys_name>
    <sys_package display_value="Order Management for Telecom, Media & Tech"
    source="sn_ind_tmt_orm">3c58f5d55b0310102dff5e92dc81c711</sys_package>
    <sys_policy/>
    <sys_scope display_value="Order Management for Telecom, Media & Tech">3c58f5d55b0310102dff5e92dc81c711</sys_scope>
    <sys_update_name>sys_decision_multi_result_514aeb965beda110235d85cced81c7ca</sys_update_name>
    <sys_updated_by>admin</sys_updated_by>
    <sys_updated_on>2023-03-15 18:29:26</sys_updated_on>
  </sys_decision_multi_result>
  <sys_variable_value action="delete_multiple" query="document_key=514aeb965beda110235d85cced81c7ca"/>
 ▼<sys_variable_value action="INSERT_OR_UPDATE">
    <document>sys_decision_multi_result</document>
    <document_key>514aeb965beda110235d85cced81c7ca</document_key>
    <order>100</order>
    <sys_class_name>sys_variable_value</sys_class_name>
    <sys_created_by>admin</sys_created_by>
    <sys_created_on>2023-03-15 18:29:26</sys_created_on>
    <sys_id>554aeb965beda110235d85cced81c7ca</sys_id>
    <sys_mod_count>0</sys_mod_count>
    <sys_updated_by>admin</sys_updated_by>
    <sys_updated_on>2023-03-15 18:29:26</sys_updated_on>
    <value>183910354fcd2110c5ff2624b2ce0b49</value>
    <variable display_value="Project Template Task">8d4aeb965beda110235d85cced81c7a3</variable>
  </sys_variable_value>
</xml>
```


The sys_id value should match the sys_id of the project template task determined in Step 1. If the sys_id doesn't match, proceed to the next step.

6. In the Decision Table Multiple Result record, select the **u_project_template_task** and check the XML view of another project template task to verify the sys_id of the project task template.



Configure field mappings

Configure the CSM table maps to associate fields in order lines, domain orders, and order tasks to projects in Service Portfolio Management.

Before you begin

Role required: admin

About this task

Order Management provides Customer Service Management table maps for associating order line items, domain orders, and order tasks to projects and project tasks in SPM. The tables that you configure depend on whether you're using the PPM Standard application to track projects in your organization or the Customer Project Management integration to track customer projects.

- If you're using PPM, configure the field mapping for these CSM table maps:

Table maps for PPM

Table map	Source table	Target table
Order Line Item to Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Project [pm_project]
Domain Order to Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Project Task [pm_project_task]
Order Task to Project Task	Order Task [sn_ind_tmt_orm_order_task]	Project Task [pm_project_task]

- If you're using Customer Project Management, configure the field mapping for these CSM table maps:

Table maps for Customer Project Management

Table map	Source table	Target table
Order Line Item to Customer Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Customer Project [customer_project]
Domain Order to Customer Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Customer Project Task [customer_project_task]
Order Task to Customer Project Task	Order Task [sn_ind_tmt_orm_order_task]	Customer Project Task [customer_project_task]

The source and target tables in each table map are pre-populated.

Note: If you installed demo data for Order Management, the field mapping for the **Source Field** and **Target Field** display the values used for demo data. You can use the existing field mapping or change it as needed.

Procedure

1. Navigate to **All** and in the filter enter `csm_table_map.list`.
2. Do one of the following:
   - If you're using PPM, select the Order Line Item to Project table map.
   - If you're using Customer Project Management, select the Order Line Item to Customer Project table map.
3. Go to the **Basic Field Mapping** related list and define a field mapping.

   Note: If Order Management demo data is installed, the **Source Field** and **Target Field** values in the Basic Field Mapping related list display the mapping for demo data. You can use the mapping or change it as needed.

Option	Steps
Define a new field mapping	**a.** Select **New**. **b.** In the **Source Field**, select an item from the source table. For example, select an item such as **Short Description** from the Order Line Item [sn_-ind_tmt_orm_order_line_item] table. **c.** In the **Target Field**, select an item from the Project [pm_project] table, such as **Project Name**. **d.** Select **Submit**. In this example, the order line **Short Description** is used as the **Project Name** in SPM.
Change an existing field mapping	**a.** Select the field mapping record. **b.** In the **Source Field**, select a different item from the Order Line Item source table, as needed. **c.** In the **Target Field**, select a different item from the Project target table, as needed. **d.** Select **Update**.

4. Do one of the following:
    - If you're using PPM, select the Domain Order to Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.
    - if you're using Customer Project Management, select the Domain Order to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

   For example, you can select the **Short Description** field in the Domain Order source table and map it to the **Short Description** field in the Project Task target table.

5. Do one of the following:
    - If you're using PPM, select the Order Task to Project table map if and repeat Step 3 to define a new field mapping or update an existing mapping.
    - If you're using Customer Project Management, select the Order Task to Customer Project table map and repeat Step 3 to define a new field mapping or update an existing mapping.

   For example, you can select the **Short Description** field in the Order Task source table and map it to the **Short Description** field in the Project Task target table.

Result

The fields in the Order Management source tables are mapped to the fields in the SPM target table.

Control automatic closure of project tasks

Manage the automatic closure of projects in the SPM integration by using the *sn_ind_tmt_orm.project.task.auto.closure* system property.

Before you begin

Role required: admin

About this task

In the SPM integration, Order Management closes project tasks automatically when all associated order tasks are completed and there are no open child tasks that have project task dependencies. If a project task has open child tasks, Order Management doesn't automatically close the project task. You can use the *sn_ind_tmt_orm.project.task.auto.closure* property to suppress or reactivate the automatic closure of project tasks.

Procedure

1. Navigate to **All** and in the filter, enter `sys_properties.list` and press **Enter**.
2. Search for and open the *sn_ind_tmt_orm.project.task.auto.closure* property.
3. In the **Value** field, set the value for the property.
    - To suppress automatic project task closure, enter `false`.
    - To reactivate automatic project task closure, enter `true`.
4. Select **Update**.
   Automatic project task closure in the SPM integration is immediately suppressed or reactivated based on the value that you entered. If automatic closure is suppressed, any order task-to-project task updates occur only when order tasks are in an in-progress state.

Tracking order tasks and associated projects

With the SPM integration, project managers and fulfillment agents or managers can track projects in Strategic Portfolio Management that have associated order tasks in Order Management.

Tracking projects for planned order tasks in SPM

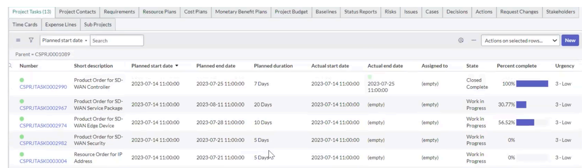
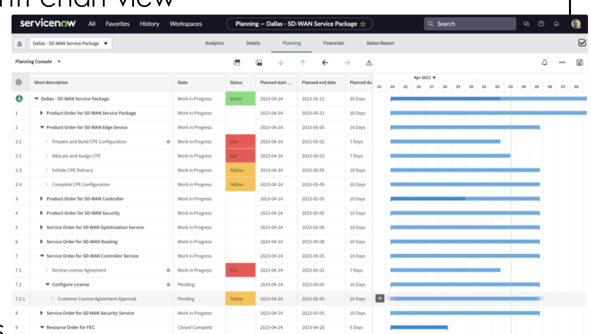
As a project manager, you can review and update projects that have been created for tracking planned order tasks using the Project Portfolio Management application in SPM. When fulfillment managers and agents update or complete order tasks, Order Management automatically synchronizes project states between SPM and order line items, task and domain order states, and project task and order task states as fulfillment managers and agents complete order tasks.

A project manager has the it_project_manager role for tracking and updating projects.

Project manager tasks

Task	Details
Review an order fulfillment project and state	1. Navigate to **All** > **Projects** > **Project Workspace**. 2. Select the project for the order item.

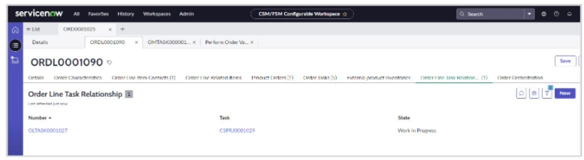
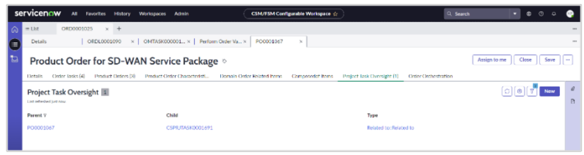
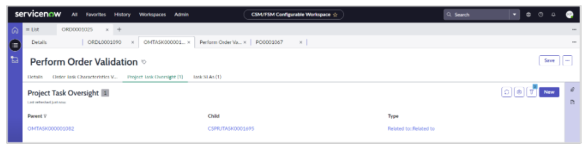
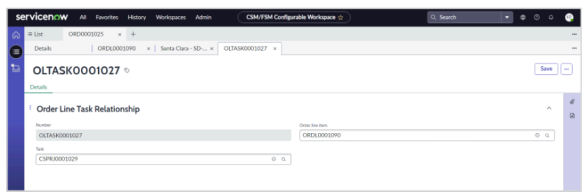
Project manager tasks (continued)

Task	Details
	Note: The **Project Name** is the name assigned when Order Management created the project using the specified project template. **3.** Select the **Details** tab then scroll down to the **Project Tasks** tab to review project tasks, State, and Percent complete, 
Review the project state and project task state to assess the project status	**1.** Navigate to **All** > **Projects** > **Project Workspace**. **2.** Select the project for the order item. **3.** Select the **Planning** tab. The Gantt chart view  displays.
Review notes and comments on order tasks from fulfillment agents and managers	**1.** Navigate to **All** > **Projects** > **Project Workspace**. **2.** Select the project for the order item. **3.** Go to the **Notes** tab and view the comments and status updates from Order Management.

Tracking fulfillment tasks that have associated projects in Order Management

As a fulfillment agent or manager, you can view the relationship between a project and order line item, project tasks, and order task in the Configurable Workspace. You can also post notes and additional comments on order lines and order tasks to communicate with the project manager responsible for project oversight of the order management tasks.

Fulfillment agent or manager tasks

Task	Example
View order line-to-project relationship in order line item form	
View project task-to-domain order relationship in domain form	
View order task-to-project task relationship in order task from	
View **Details** tab in order task relationship to see task number, project number, and order line item number relationship	

Sales and Order Management reference

Reference topics provide additional information about the Sales and Order Management applications.

Order Management reference

Reference topics provide additional information about Order Management.

Account Details form in Order Management

The Accounts Details form enables you to create or review account details for a customer or for a partner.

Field	Description
Name	Name of the enterprise or customer.
Account	System-assigned account number, in the format ACTnnnnnnn.
Primary Contact	Name of the primary contact person for the account. Select the search icon ( ) to search for related records.
Parent Account	Name of the parent account, if any, for this account. • For example, if you are setting up an account that is a national branch of a multi-national corporation, the parent

Field	Description
	account is the one for the multi-national corporation. Select the search icon (🔍) to search for a parent account. • If there isn't a parent account, leave this field empty.
Registration Code	Registration code, if any, assigned to the account.
Customer	Option that designates if this account is for a customer.
Partner	Option that designates if this account is for a business partner.
Website	URL of the website for this account, if any.
Phone	Primary phone number for the account.
Street	Street address for the account.
City	Name of the city for the account.
State / Province	Name of the US state or Canadian province for the account.
Zip / Postal code	Zip or postal code for the account.
Country	Name of the city for the account.
Notes	Free form note text for the customer account.

Customer Order Management workspace and Customer Order forms

The Customer Order Management workspace and Customer Order forms enable you to select, review,and modify captured customer orders.

Customer Order Management workspace fields

The Customer Order Management workspace form enables you to select customer orders for review and modification.

Customer Order Management workspace fields

The **Details** tab on the form provides case-related information.

Tile	Description
New Customer Orders	Number of new customer orders that require review.

Tile	Description
	1. If you click this tile, the New Order list appears. 2. Select the new order that you want to review. To learn more, see Select, review, revise, or request cancellation of a customer order.
Open Tasks	Number of open customer order tasks that require review and action. 1. If you click this tile, the Open Tasks list appears. 2. Select the open order task that you want to review. To learn more, see Review and update the customer order fulfillment tasks.
Unassigned Tasks	Number of unassigned customer order tasks that require assignment and action. 1. Click this tile to see the Unassigned Tasks list. 2. Select the unassigned order task that you want to review. To learn more, see Review and update the customer order fulfillment tasks.
Open Fallouts	Number of open fallout records. 1. Click this tile to see the Open Fallouts list. 2. Select the fallout record that you want to review. To learn more, see Update a fallout record.
Open Customer Orders	Pie chart that indicates the number and percentage of customer orders that are in process or in the process of cancellation. 1. Click this tile to see the Current Customer Order list. 2. Select the customer order that you want to review.
Customer Order Fulfillment trends	Number of customer orders that were fulfilled during the last four months.
My Active Tasks	Listing of the active customer order tasks assigned to the logged-in user. The following information appears: Number

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Tile	Description
	Unique system-assigned task number that starts with a prefix of TASK. Priority Relative priority or importance of the active task. 1-Critical Task with urgent time criticality that requires immediate attention. 2-High Task with high time criticality, though not as urgent as a Critical priority order task. 3-Moderate Task with medium time criticality and urgency. 4-Low Task with low time criticality and urgency. Short description Short description of the task. State Current state for the task. Open Processing for the task is open, and no processing is taking place. In Progress Processing for the task is still in progress or in fulfillment. Closed Complete Processing for the task is complete. It is a system-assigned state. Canceled

Tile	Description
	Processing for the order task was canceled.

Customer Order form fields

The Order Line Items form line item details section enables you to review and modify the general details for a customer order line item.

Field	Description
ORDnnnnnnn	Unique system-assigned customer or service order number.
Account	Name of the customer account. Click the account name to review the account details: • Account name • Account number • Primary Contact • Parent Account (if any) • Registration Code • Customer or Partner check boxes, indicating if the account is a customer or business partner • Web site • Phone • Address
Contact	Name of the account contact person. Click the name to review the following contact details: • First and last name • Account name • Contact title • Language • Email address • Business and mobile phone number • Time zone • Notification indicator. You can use this information to enable or disable order notifications to the customer.

Customer Order Details pane - order details fields

The Customer Orders Details pane - order details section enables you to review and modify the general details for a customer order.

Field	Description
Order	Unique system-assigned customer order number. **Note:** Both customer orders and service orders have an assigned ID with a prefix of ORD. To learn more about service orders, see • Creating, reviewing, approving, and fulfilling service orders • Select, review, revise, or request cancellation of a service order
Account	Name of the customer account. **Note:** To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon ( ) to view the associated details for the field. • Click the search icon ( ) to search for related records. • Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the contact for the order.
Order Date	Date that you received the customer order.

PONR	Option that indicates if this order is past the Point of No Return.
	• If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress.
	  ◦ You can't click **Revise Order** or **Cancel Order** to attempt to change the order line item or to request a cancellation for it.
	  ◦ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.
	• If cleared, you can still revise the order or request a cancellation for it.

Field	Description
	The value for this option is a system-assigned flag that you can't manually update.
Order Category	Category that indicates the type of order. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. **Note:** Like a captured service order, customer orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to easily identify the type of order.
State	Indicator of the current processing state for the customer order, including all of its associated line items. To view a listing of the state selections, click the down arrow icon (▼). **Note:** To view a comprehensive listing of customer order states with detailed descriptions, see Customer order states Customer order states.
Fulfillment Type	Type of fulfillment action for the customer order. Deliver Deliver ordered items to the customer when you fulfill the order. Qualify Check the feasibility of delivering the products and services requested on the customer order. Without actually activating or delivering the products or services for the order, it usually processes with a different set of tasks. If all preceding tasks are complete, processing for the associated product, service, or resource order tasks can start.
Version	Current version of the customer order. Indicates the number of times that you revised the customer order during the fulfillment process. A customer order for a product or service can go through multiple revisions during its fulfillment cycle. A new order without any revisions has a version of one, and automatically increments for each inflight revision.
Revision Operation	Type of revision operation, if any, that is taking place in the current version of the customer order: None

Field	Description
	No update or cancellation is taking place for the customer order. This setting is the default for new customer orders. Update A Characteristic, Contact, or Price inflight revision has been submitted for the customer order. Cancel A customer order is canceled or in the process of being canceled.

Customer Order Details pane - pricing details fields

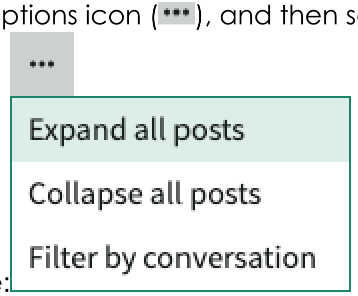
The Customer Orders Details pane - pricing details section enables you to review and modify the pricing details for a customer order.

Field	Description
Monthly Recurring Charges	Total nonrecurring charges for the entire customer order. An example is a one time installation fee.
Non Recurring Charges	Total nonrecurring charges for the entire customer order. An example is a one time installation fee.
Contract	ID for the service contract, if any, that is associated with the customer order.
Total Price	Total price for the entire customer order.

Customer Order Details pane - other details fields

The Customer Orders Details pane - order details section enables you to review and modify the additional details for a customer order.

Field	Description
Other details	Actual and expected start date details for the customer order.
Actual Start Date	Field that you can use for any date-related purpose. For example, you can use it to enter the actual date that you delivered the ordered item or service.

Field	Description
	Note: The **Actual End Date**, **Expected Start Date**, and **Expected End Date** fields are informational only and are not used for any type of processing in your instance.
Actual End Date	Field that you can use for any date-related purpose. For example, you can use it to enter the actual date that you delivered the ordered item or service.
Expected Start Date	Field that you can use for any date-related purpose. For example, you can use it to designate the date after which the customer expects the delivery of the ordered item or service.
Expected End Date	Field that you can use for any date-related purpose. For example, you can use it to designate the date before which the customer expects the delivery of the ordered item or service.
Notes	Additional comments block.
Other comments	Extra free-form internal comment text for the customer order.
Compose	Universal comment text block.
Comments	Free-form comment text for the customer order that everyone, including the customer, can see.
Activity	Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions: • Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 

Field	Description
Attachments	File attachments for the customer order. Click **Browse** to add the file as an attachment.

Order Characteristics Values form in Order Management for Telecommunications, Media, and Technology

The Order Characteristics Values form enables you to review and modify order characteristics for a service order.

Field	Description
Specification	Service specification that is associated with the service order characteristic. To view specification details, click the service specification. To learn more, see Review and update the service specifications for service order line item.
Characteristic	Selected characteristic, for example, Data Pack, for the service order line item. To view and update the characteristic details, click the characteristic. These details include the characteristic name, description, and input type.
Characteristic Value	Value that you selected for the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. To view and update the characteristic value details, click the characteristic value. These values include the following: • Name of the associated specification • Characteristic name • Selected characteristic value • Associated characteristic option • Associated service order line item
Characteristic Option	Name of the characteristic option. For example, Unlimited, for the Data Pack Unlimited option. To view and update the characteristic option details, click the characteristic option. These values include the name of the characteristic option and the associated characteristics.

Customer order line items form in Order Management for Telecommunications, Media, and Technology

The Order Line Items form enables you to select, review, and modify the captured customer order line items.

Order Line Items form - line item details fields

The Order Line Items form line item details section enables you to review and modify general details for a customer order line item.

Field	Description
Number	Unique system-assigned number of the order line item.
Order	Unique system-assigned number for the customer order. Both customer orders and service orders have an assigned ID with a prefix of ORD.
Product Specification	Product specification that is associated with the order line item. To learn more, see .
Version	Current version of the customer order line item. Indicates the number of times that you revised the customer order line item during the fulfillment process. A new order line item without any revisions has a version of 1 (one) and automatically increments for each inflight revision.
Order Category	Category that indicates the type of order line item. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. **Note:** Like a captured service order, customer orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to identify the type of order.
State	Indicator of the current processing state for this customer order line item. To view a listing of the state selections, click the down arrow icon (▼).

Field	Description
	Note: To view a comprehensive listing of the customer order line item states with detailed descriptions, see Customer order states.
Model	Product offering purchased by the customer. To learn more, see .
Quantity	Line item order quantity.
PONR	Option that indicates if this order line item is past the Point of No Return. • If selected, it indicates that you can't revise the order line item or request a cancellation for it while the fulfillment process is in progress. ◦ You can't click **Revise Order** or **Cancel Order** to attempt to change the order line item or to request a cancellation for it. ◦ If any of the order line items are designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order. • If cleared, you can still revise the order line item or request a cancellation for it. The value for this option is a system-assigned flag that you can't manually update.
Revision Operation	Indicates the type of revision operation, if any, that is taking place in the current version of the customer order line item: None No update or cancellation is taking place for the customer order line item. This setting is the default for new customer orders. Update A Characteristic, Contact, or Price inflight revision has been submitted for the customer order line item.

Field	Description
	Cancel The customer order line item is canceled or in the process of being canceled.
Order line action	Indicates the type of action that is taking place in the order line item. Suspend Suspension is taking place for the customer order line item. Resume Resume of services is taking place for the customer order line item. No change No change is taking place for the customer order line item.
Short Description	Short description of the purchased product offering.

Order line items form - pricing detail fields

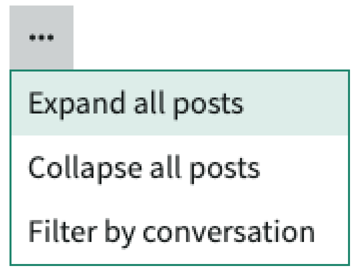
The Order Line Items form - pricing details section enables you to review and modify the pricing details for a customer order line item.

Field	Description
Monthly Recurring Charges	Total monthly recurring charges for this order line item. An example is a monthly line charge.
Non Recurring Charges	Total non-recurring charges for this order line item. An example is a one-time installation fee.
Contract	ID for the service contract, if any, that is associated with the customer order.
Total Price	Total price for this order line item.

Order line items form - other details fields

The Order Line Items form - other details section enables you to review and modify the additional details for a customer order line item.

Field	Description
Shipping Address	Line item shipping address section.
Street	Destination street address.
City	Name of the destination city.
State	Name of the destination U.S. state or Canadian province.
Zip / Postal Code	Destination U.S. ZIP code or Canadian postal code.
Notes	Additional comments block.
Additional comments	Additional free-form internal comment text for the order line item.
Work notes	Free-form internal work order text for the order line item.
Compose	Comment or private work note text block.
Comments / Work notes (Private)	Free-form comment or private work note text: • Click the comments icon ( ) to enter the comment text for the order line item so that everyone, including the customer, can see. Enter the comment text, and then click **Post Comments**. • Click the work notes (private) icon ( ) to enter the work note text for internal purposes only so that the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Listing of the processing activities, and changes in field values, that have taken place for the order and order line item. This activity includes the messages that indicate the approval of the order for processing and fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions:

Field	Description
	• Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon (•••), and then select the appropriate one: 
Attachments	File attachments for the order line item. Click **Browse** to add the file as an attachment.

Order line items form - Product Specification form fields

The Order line items form - Product Specification section enables you to review and modify the product specifications details for a customer order line item.

Field	Description
Number	Unique system-assigned product specification number.
Name	Name of the product specification.
Type	Type of specification. Goods Specification for the goods that you sell. Service Specification for a service that you provide to your customer. Network Product specification for a network.
Start Date	Effective start date of the product specification.
End Date	Effective expiration date of the product specification.

Field	Description
Description	Short description of the product specification.
State	State of the product specification. Published Indicates a published product specification for use in a product offering.
Product Code	Product code for the specification.
Product Line	Product line for the specification.
Cost to Company	Cost to the company for this product specification. This field is for profit-calculation purposes only.
Composite	Option that designates that the product specification is a complex enterprise product specification. A composite product is typically comprised of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they constitute a single complex product.
Installation required	Option that indicates if the associated product requires installation at the customer site.
Location Specific	Option that designates that this product specification requires you to enter the location details into a customer order for fulfillment and installation.

Order Line Items form (service orders)

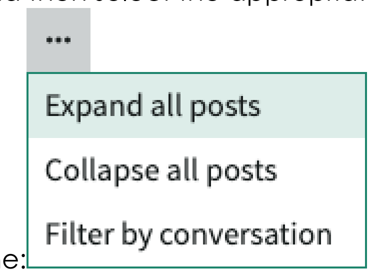
The Order Line Items form - line item details section enables you to review and modify the general details for a service order line item.

Field	Description
Order Line	Unique system-assigned service order line item number.

Field	Description
Order	Unique system-assigned service order number. Both customer orders and service orders have an assigned ID with a prefix of ORD.
Service Specification	Service specification that is associated with the order line item. To learn more, see .
Version	Current version of the service order line item. The version number indicates the number of times that you revised the service order line item during the fulfillment process. A new order line item without any revisions has a version of 1 (one) and automatically increments for each inflight revision.
Order Category	Category that indicates the type of order. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. **Note:** Like a customer order, service orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to easily identify the type of order.
State	Unless indicated, the service order manager manually assigns the appropriate state to the service order line item, depending on where it resides in your processing and fulfillment cycle. To view a listing of the state selections, click the down arrow icon (▾). **Note:** To view a comprehensive listing of service order line item states with detailed descriptions, see Service order states.
Model	Model number of the product that requires servicing. Each service and resource specification maps to a service and resource model to create inventory records for the customer and order.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Quantity</td><td>Service order line item quantity.</td></tr>
<tr><td>PONR</td><td>Option that indicates if this order is past the Point of No Return.
If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress.
You can't click Revise Order or Cancel Order to attempt to change the order line item or to request a cancellation for it.
If any order line item is designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR. If any of the line items on an order reaches PONR, you can't revise the other line items on the same order.
If cleared, you can still revise the order or request a cancellation for it.
The value for this option is a system-assigned flag that you can't manually update.</td></tr>
<tr><td>Revision Operation</td><td>Type of revision operation, if any, that is taking place in the current version of the service order:<dl><dt>None</dt><dd>No update or cancellation is taking place for the service order. This setting is the default for new orders.</dd><dt>Update</dt><dd>A Contact, Characteristic, or Price inflight revision has been submitted for the service order.</dd><dt>Cancel</dt><dd>The service order is canceled or in the process of being canceled.</dd></dl></td></tr>
<tr><td>Short Description</td><td>Short description of the purchased product offering.</td></tr>
<tr><td>Shipping Address</td><td>Line item shipping address section</td></tr>
</table>

Field	Description
Street	Destination street address.
City	Name of the destination city.
State	Name of the destination U.S. state or Canadian province.
Zip / Postal Code	Destination U.S. ZIP code or Canadian postal code.
Notes	**Additional comments block**
Another comments	Additional free-form internal comment text for the service order line item.
Work notes	Free-form internal work order text for the service order line item.
Compose	Comment/private work note text block.
Comments / Work notes (Private)	Free-form comment or private work note text: • Click the comments icon ( ) to enter the comment text for the service order line item so that everyone, including the customer, can see. Enter the comment text, and then click **Post Comments**. • Click the work notes (private) icon ( ) to enter the work note text for internal purposes only so that the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Listing of the processing activities and changes in field values that have taken place for the order and order line item. This activity includes messages that indicate approval of the order for processing and fulfillment. To expand, collapse, or filter by activity stream, do one of the following actions:

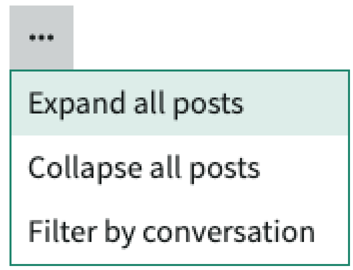
Field	Description
	• Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 
Attachments	File attachments for the service order line item. Click **Browse** to add the file as an attachment.

Order Task form in Order Management for Telecommunications, Media, and Technology

The Order Task form enables you to review and update the fulfillment tasks that are associated with the selected order.

Field	Description
Details	Order task details section.
Number	System-assigned ID for the task, starting with a prefix of TASK.
Account	Name of the customer account. **Note:** To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon ( ) to view the associated details for the field. • Click the search icon ( ) to search for related records. • Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Short Description	Short description of the order task.

Field	Description
State	Current state for the order task. To view a listing of selections, click the down arrow (▾) icon: Open Processing for the order task is open, and no processing is taking place. In Progress Processing for the order task is still in progress, or in fulfillment. Closed Complete Processing for the order task is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the order task, the state is automatically set to **Closed Complete**. Canceled Processing for the order task was canceled.
Work notes	Free-form internal work order text for the order task.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Activity stream section for viewing all processing activities that have taken place for the selected order task. It includes a message that indicates that the order has been approved for processing and fulfillment.To expand, collapse, or filter by activity stream:

Field	Description
	• Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 
Attachments	File attachments for the order task. Click **Browse** to add the file as an attachment.

Product and domain order forms in Order Management for Telecommunications, Media, and Technology

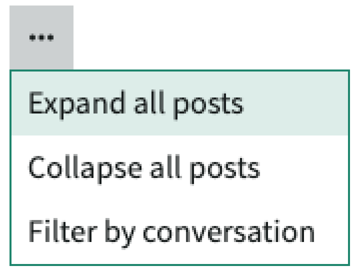
The domain order forms enable you to review and modify the domain product orders, service orders, and resource orders for a selected customer order.

Product Order form fields

The Product Order form enables you to review and modify the domain product orders that are associated with a selected customer order.

Field	Description
Product Order	Product order detail section.
Number	Unique system-assigned product order number.
Account	Name of the customer account. **Note:** To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon ( ) to view the associated details for the field. • Click the search icon ( ) to search for related records. • Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.

Field	Description
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
Description	Short description of the product order.
State	Current state for the service order. To view a listing of selections, click the down arrow icon (▼):
Assignment group	Name of the group that the product order is assigned to for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent product order, if any, to this product order.
Short description	Short description for the product order.
Description	Extended description for the product order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Activity stream section for viewing that all the processing activities and changes in field values have taken place for the product order. To expand, collapse, or filter by activity stream:

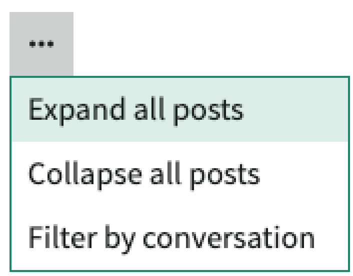
Field	Description
	• Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 
Attachments	File attachments for the product order. Click **Browse** to add the file as an attachment.

Service Order form fields

The Service Order form enables you to review and modify domain service orders that are associated with a selected customer order.

Field	Description
Service Order	Service order details section.
Number	Unique system-assigned service order number.
Account	Name of the customer account. **Note:** To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon ( ) to view the associated details for the field. • Click the search icon ( ) to search for related records. • Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.

Field	Description
State	Current state for the service order. To view a listing of selections, click the down arrow icon (▼): Draft Product, service, or resource that has assigned new or waiting-to-start tasks. Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group that the service order is assigned to for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent service order, if any, to this service order.
Short description	Short description for the service order.

Field	Description
Description	Extended description for the service order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Activity stream section for viewing all processing activities that have taken place to date for the service order. This listing has the processing activities and changes in the field values that have taken place for the service order. To expand, collapse, or filter by activity stream: • Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 
Attachments	File attachments for the service order. Click **Browse** to add the file as an attachment.

Resource Order form fields

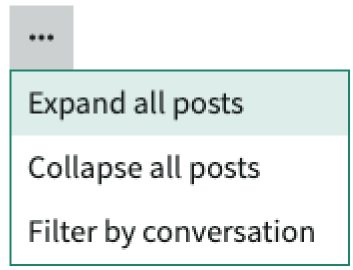
The Resource Order form enables you to review and modify domain resource orders associated with a selected customer order.

Field	Description
Resource Order	Resource order detail section.
Number	Unique system-assigned resource order number.

Field	Description
Account	Name of the customer account. **Note:** To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon ( ) to view the associated details for the field. • Click the search icon ( ) to search for related records. • Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
Short Description	Short description of the resource order.
State	Current state for the resource order. To view a listing of selections, click the down arrow icon ( ): Draft Product, service, or resource that has assigned new or waiting-to-start tasks. Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state.

servicenow

Field	Description
	Note: After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group to which the resource order is assigned for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent resource order, if any, to this resource order.
Short description	Short description for the resource order.
Description	Extended description for the resource order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Activity stream section for viewing all processing activities and changes in the field values that have taken place for the resource order. To expand, collapse, or filter by activity stream:

Field	Description
	• Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon (•••), and then select the appropriate one: 
Attachments	File attachments for the resource order. Click **Browse** to add the file as an attachment.

Restructured Order Management tables (San Diego release and above)

The table architecture that supports the Order Management for Telecommunications, Media, and Technology application has been restructured. Existing customers who upgraded from earlier releases to the San Diego release must first run a Post upgrade Script to reparent the order tables and then perform column promotions.

Before you use Order Management for Telecommunications, Media, and Technology (2.0.0), you must run the Post Upgrade Script after your upgrade to San Diego. For detailed information about this script, see the Order Management for Telecommunications, Media, and Technology (2.0.0) version: Post upgrade reparenting script for the San Diego release [KB1000941] article in the Now Support Knowledge Base.

Note: If you do not run this script to perform table reparenting and column promotion, the order decomposition and order fulfillment functions do not work as designed. In these cases, the following error message appears after the approval of an order:

```
Some of the OMT tables need reparenting. Please contact system
 administrator to execute the reparenting script.
```

By using the Now Support Portal, raise a new Case with the Technical Support team to assist you in applying these changes.

Service Order Management workspace and Customer Order forms in Order Management for Telecommunications, Media, and Technology

The Service Order Management workspace and Customer Order forms enable you to select, review,and modify captured service orders.

Service Order Management workspace fields

The Service Order Management workspace form enables you to select service orders for review and modification.

Tile	Description
New Orders	Number of new service orders that require review. **1.** Click this tile to see the New Order list. **2.** Select the new order you want to review. To learn more, see Reviewing the details for a service order.
Open Tasks	Number of open service order tasks that require review and action. **1.** Click this tile to see the Open Tasks list. **2.** Select the open order task you want to review. To learn more, see Reviewing and updating the service order fulfillment tasks.
Unassigned Tasks	Number of unassigned service order tasks that require assignment and action. **1.** Click this tile to see the Unassigned Tasks list. **2.** Select the unassigned order task that you want to review. To learn more, see Reviewing and updating the service order fulfillment tasks.
Open Fallouts	Number of open fallout records. **1.** Click this tile to see the Open Fallouts list. **2.** Select the fallout record that you want to review. To learn more, see Update a fallout record.
Open Service Orders	Pie chart that indicates the number and percentage of service orders that are in process or in the process of cancellation. **1.** Click this tile to see the Current Service Order list. **2.** Select the service order that you want to review.
Service Order Fulfillment Trend	Number of service orders that were fulfilled during the last four months.
My Active Tasks	Listing of the active service order tasks that are assigned to the logged in user. The following information appears: Number

Tile	Description
	Unique system-assigned task number that starts with a prefix of TASK. Priority Relative priority or importance of the active task. 1-Critical Task with urgent time criticality that requires immediate attention. 2-High Task with high time criticality, though not as urgent as a Critical priority order task. 3-Moderate Task with medium time criticality and urgency. 4-Low Task with low time criticality and urgency. Short description Short description of the task. State Current state for the task. Open Processing for the task is open, and no processing is taking place. In Progress Processing for the task is still in progress or in fulfillment. Closed Complete Processing for the task is complete. It is a system-assigned state. Canceled

Tile	Description
	Processing for the order task was canceled.

Customer Order form fields for service orders

The Order Line Items form line item details section enables you to review and modify the general details for a service order line item.

Field	Description
ORDnnnnnnn	Unique system-assigned customer or service order number.
Account	Name of the customer account. Click the account name to review the account details: • Account name • Account number • Primary Contact • Parent Account (if any) • Registration Code • Customer or Partner check boxes, indicating if the account is a customer or business partner • Web site • Phone • Address
Contact	Name of the account contact person. Click the name to review the following contact details: • First and last name • Account name • Contact title • Language • Email address • Business and mobile phone number • Time zone • Notification indicator. You can use this information to enable or disable order notifications to the customer.

Customer Order Details pane - service order details fields

The Customer Orders Details pane - service order details section enables you to review and modify the general details for a service order.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Order</td><td>Unique system-assigned service order number.

Note: Both customer orders and service orders have an assigned ID with a prefix of ORD. To learn more about customer orders, see
• Creating, changing, and cancelling manual product orders
• Select, review, revise, or request cancellation of a customer order</td></tr>
<tr><td>Account</td><td>Name of the customer account.

Note: To view the associated field details, search for related records or open a calendar as follows:
• Click the detail icon ( ) to view the associated details for the field.
• Click the search icon ( ) to search for related records.
• Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.</td></tr>
<tr><td>Contact</td><td>Name of the contact for the order.</td></tr>
<tr><td>Order Date</td><td>Date that you received the service order.</td></tr>
<tr><td>PONR</td><td>Option that indicates if this order is past the Point of No Return.
• If selected, it indicates that you can't revise the order or request a cancellation for it while the fulfillment process is in progress.
◦ You can't click Revise Order or Cancel Order to attempt to change the order line item or to request a cancellation for it.
◦ If any order line item is designated as PONR, the parent order is also designated as PONR. If the parent order is designated as PONR, the associated line items are also designated as PONR.</td></tr>
</table>

Field	Description
	If any of the line items on an order reaches PONR, you can't revise the other line items on the same order. • If cleared, you can still revise the order or request a cancellation for it. The value for this option is a system-assigned flag that you can't manually update.
Order Category	Category that indicates the type of order. Product Product order: Customer is ordering a product. Service Service order: Request for the servicing of a product or installation of a service. **Note:** Like a customer order, service orders have an ID with a prefix of **ORD(nnn)**. The **Order Category** field enables you to easily identify the type of order.
State	Indicator of the current processing state for the service order, including all of its associated line items.To view a listing of the state selections, click the down arrow icon ( ). **Note:** To view a comprehensive listing of service order states, with detailed descriptions, see Service order states.
Fulfillment Type	Type of fulfillment action for the service order. Deliver Deliver ordered items to the customer when the order is fulfilled. Qualify Check the feasibility of delivering the services requested on the service order. Without actually activating or delivering the services for the order, it usually processes with a different set of tasks. If all preceding tasks are complete, processing for the associated

Field	Description
	service or resource order tasks can start.
Version	Current version of the service order. Indicates the number of times that the service order was revised during the fulfillment process. A new order without any revisions has a version of 1 (one) and automatically increments for each inflight revision.
Revision Operation	Type of revision operation, if any, that is taking place in the current version of the service order: None No update or cancellation is taking place for the service order. This setting is the default for new orders. Update A Contact, Characteristic, or Price inflight revision has been submitted for the service order. Cancel The service order is canceled or in the process of being canceled.

Customer Order Details pane - other service order details fields

The Customer Orders Details pane - other service order details section enables you to review and modify additional details for a service order.

Service order-related domain order forms in Order Management for Telecommunications, Media, and Technology

The service order-related domain order forms enable you to review and modify the domain service orders, service specifications, and resource orders for a selected service order.

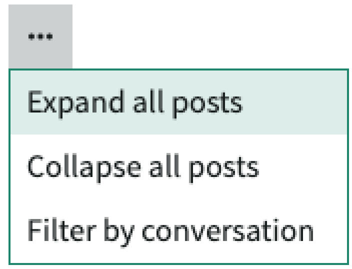
Domain resource orders fields

The Domain Resource Order form enables you to review and modify the domain resource orders that are associated with a service order.

Field	Description
Resource Order	Resource order detail section.
Number	Unique system-assigned resource order number.

Field	Description
Account	Name of the customer account. **Note:** To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon ( ) to view the associated details for the field. • Click the search icon ( ) to search for related records. • Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.
Order Line Item	Unique system-assigned order line item number.
Short Description	Short description of the resource order.
State	Current state for the resource order. To view a listing of selections, click the down arrow icon ( ): Draft Product, service, or resource that has assigned new or waiting-to-start tasks. Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state.

Field	Description
	Note: After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group to which the resource order is assigned for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent resource order, if any, to this resource order.
Short description	Short description for the resource order.
Description	Extended description for the resource order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Activity stream section for viewing all processing activities and changes in the field values that have taken place for the resource order. To expand, collapse, or filter by activity stream:

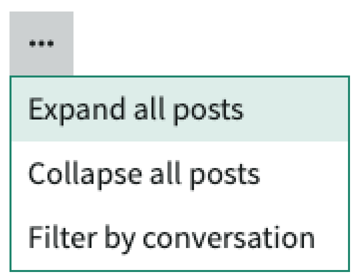
Field	Description
	• Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 
Attachments	File attachments for the resource order. Click **Browse** to add the file as an attachment.

Domain service order fields

The Domain Service Order form enables you to review and modify the domain service orders that are associated with a service order.

Field	Description
Service Order	Service order details section.
Number	Unique system-assigned service order number.
Account	Name of the customer account. **Note:** To view the associated field details, search for related records or open a calendar as follows: • Click the detail icon ( ) to view the associated details for the field. • Click the search icon ( ) to search for related records. • Click the calendar icon ( ) to open a calendar so that you can select a date for the date entry fields.
Contact	Name of the account contact person.

Field	Description
Order Line Item	Unique system-assigned order line item number.
State	Current state for the service order. To view a listing of selections, click the down arrow icon (▼): Draft Product, service, or resource that has assigned new or waiting-to-start tasks. Qualified All required prerequisite tasks that are complete. Processing for the product, service, resource order, or its associated tasks can start. In Progress Product, service, or resource order processing that is still in progress. Closed Complete Product, service, or resource order processing that is complete. It is a system-assigned state. **Note:** After your agents complete all fulfillment tasks for the entire product, service, or resource order, the state is automatically set to Closed Complete. Canceled Product, service, or resource order processing that was canceled.
Assignment group	Name of the group that the service order is assigned to for completion of any remaining work.
Assigned to	Name of the person that the remaining work is assigned to.
Parent	Parent service order, if any, to this service order.

Field	Description
Short description	Short description for the service order.
Description	Extended description for the service order.
Compose	Work note text block.
Work notes (Private)	Free-form private work note text for the product order. This work note text is for internal purposes only, and the customer can't see it. Enter the work note text, and then click **Post Work notes (Private)**.
Activity	Activity stream section for viewing all processing activities that have taken place to date for the service order. This listing has the processing activities and changes in the field values that have taken place for the service order. To expand, collapse, or filter by activity stream: • Click the activity stream filter icon ( ) to filter by additional comments, attachments, or state. • Click the more options icon ( ), and then select the appropriate one: 
Attachments	File attachments for the service order. Click **Browse** to add the file as an attachment.

Service specifications fields

The Service Specification form enables you to review and modify the service specifications that are associated with a service order.

Field	Description
Number	Unique system-assigned service specification number.

Field	Description
Name	Name of the service specification.
Type	Type of specification. Goods Specification for the goods that you sell. Service Specification for a service that you provide to your customer. Network Product specification for a network.
Start Date	Effective start date of the product specification.
End Date	Effective expiration date of the product specification.
Description	Short description of the service specification.
State	State of the service specification. Published Indicates a published service specification for use in a product offering
Product Code	Product code for the specification.
Product Line	Product line for the specification.
Cost to Company	Cost to the company for this service specification. This field is for profit-calculation purposes only.
Composite	Option that designates that the product specification is a complex enterprise product specification. A composite product is typically comprised of a parent or umbrella specification, and multiple child specifications, each with their own characteristics. When bundled together, they constitute a single complex product.

Field	Description
Installation required	Option that indicates if the associated product requires installation at the customer site.
Location Specific	Option that designates that this service specification requires you to enter the location details into a service order for fulfillment and installation.

Specification Versions form in Order Management for Telecommunications, Media, and Technology

The Specification Versions form enables you to view version information for a selected specification before you retire or archive it.

Specification versions

Field	Description
Number	Auto-generated ID for the product specification version.
Display Name	Displayed name that appears for the specification in the Now Platform when this version of the specification is in effect.
Version	Version number that is assigned to this specification version.
State	State of the product specification version: Draft Unpublished draft product specification version that is assigned when you first create the specification record. Published Published product specification version that is assigned when you formally publish it for use in a product offering. Retired Product specification version that is retired and can't be used in a product offering or to create another specification version. Archived Product specification that is no longer being used in the ordering or fulfillment process.

Specification versions (continued)

Field	Description
Created	Date and time at which the specification version was created.
Created by	ID of the logged-in user who created the specification version.
Updated	Date and time at which the specification version was last updated.
Updated by	ID of the logged-in user who last updated the specification version.