NOW Platform Glossary

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A

Glossary terms are grouped alphabetically.

Accordion

Gives users the ability to reveal and hide relevant sections of content in collapsible categories.

ⓘ Note: This component is only available for use in code and will not appear in UI Builder.

Application template

Provides predefined data, experience, logic and automation, and security to support a certain use case. For example, the Travel Request template provides application content for submitting and approving employee travel requests.

For more information on the available templates, see Available templates ↗.

account

An account is a supported external customer. An account can be a customer account, a partner account, or both.

agent-intiated

A chat that the agent starts.

asynchronous chat

This feature in Engagement Messenger empowers support agents and end users to engage in conversations at their own pace, without the constraint of being online simultaneously. Through notifications, the user is notified about the new messages received.

account hierarchy

An account hierarchy represents the legal entity structure of the accounts and their relationships, the account's customers, assets, and service entitlements.

assignment workbench

A feature, part of case routing, that uses configurable criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking of how well they can handle certain cases. Managers can view these results and click one button to assign a task.

B

Glossary terms are grouped alphabetically.

business location

The business location enables you to model internal and external organizational structures to support customers and provide agents the right level of visibility into customer data.

bot response

The type of response that the virtual agent (bot) gives to the customer. For example: a card response displays information from a record with rich content such as a video or image.

C

Glossary terms are grouped alphabetically.

Callback

Users can request an immediate callback or schedule a voice or video callback from an agent during a chat on Virtual Agent or Engagement Messenger. Additionally, users can easily reschedule or cancel their callback requests.

case

A record that is used to track and manage a specific customer issue, request, or incident. It is commonly used in resolving issues through customer support and helpdesk systems.

customer access management

Customer access management supports multiple related parties in handling cases, sold products, and install bases by providing them with varying levels of access. For more information about Customer Access Management, see Configure customer access management ↗.

candidate case

A case created by a customer service agent to flag an issue that may be a wider problem impacting multiple customers. An agent can create a major case candidate by promoting an existing customer service case with a reported issue, or creating a major case candidate directly.

case routing

A feature that uses matching rules and assignment rules to identify cases with specific case attributes and route them to the best-equipped customer service agent. Part of Engagement Messenger.

case synchronization

A major issue management system property that allows for user-specified fields from the major case to be synchronized with each of the associated child cases.

child case

Cases that are associated with a major case, created one-to-one for each business account (B2B) or consumer (B2C) impacted by the major case issue. It contains customer-specific information for each customer affected by the major case issue.

case task

Tasks created for additional work that needs to be completed as part of resolving a customer service case, stored in the Case Task [sn_customerservice_task] table. Frequently assigned to users such as middle or back office agents.

Configurable Cards

Option to add a custom card to the Engagement Messenger homescreen. Using Configurable Cards, admins can display the following custom features as a card:

• Portal pages or catalog items

• Links to external website

• Data from any table

contract

A contract contains customer-specific information like the tenure of the contract, contract line details, and the net and covered products. They also hold the after-sales service information that the customers are eligible to receive.

conversational integration

A chat with a virtual agent that engages the customer in a friendly way that simulates a normal human conversation. This conversation takes place in a 3rd party application such as Facebook or Google messenger.

customer

A customer is an account or a contact. In business-to-business (B2B) scenarios, a customer is typically an account, while in business-to-consumer (B2C) scenarios, a customer is typically a consumer.

D

Glossary terms are grouped alphabetically.

Data

Information that is stored in your application. For example, employee phone numbers or office locations. You configure application data using tables.

decision tree

A guided flow to troubleshoot an issue and provide a solution. A decision tree is a multi-step process that includes a series of questions, answers, and a guidance for users to follow.

Decision Tree Builder

A no-code visual tool, which provides a diagrammatic canvas for configuring nodes and their paths in a troubleshooting process.

Deployment request

Ticket to track the review of submitted applications. From the deployment request form, a reviewer can deploy the application to different environments, accept or reject an application, and send feedback to a developer.

E

Glossary terms are grouped alphabetically.

external user

Users who are external to your organization, such as third parties, contractors, or external agents. External users are not employees of your organization. You can define external users to have availability to access your instance, but without access to all the capabilities allocated to internal users.

Engagement Messenger

Engagement Messenger is a messenger-like pop-up that can be embedded on any third-party web application to interact with ServiceNow$^{®}$ features, such as Case Management, Knowledge, Virtual Agent, Live Agent chat, and AI Search. It enables customers to use self-service to find the information or services that they need from third-party web applications that are outside of the ServiceNow environment.

Environment

Instance that you use for the developing, testing, or launching an application. To set up App Engine Studio, you must define environments in each of the instances that you're using as environments.

Experience

Graphical interface that your users interact with. For example, you can create a portal where users find information, submit requests, or complete business tasks. For more information on the available application experiences, see Add an application experience ↗ .

entitlement

An entitlement defines the type of support that a customer receives after a product is purchased.

F

Glossary terms are grouped alphabetically.

field recommendation

A value that is recommended for a field on a record. Field recommendations are auto-filled or shown as messages underneath the fields.

G

Glossary terms are grouped alphabetically.

guidance

An action that users can take or information that they can share in Recommended Actions.

I

Glossary terms are grouped alphabetically.

install base characteristics

The install base characteristics provide information about the service requirements for timely maintenance services of an install base item.

installed products

An installed product creates an association between sold products and install base items and provides information about where the sold product instance is deployed.

install base management

The install base management helps track the products and services that are purchased by a customer along with the detailed configuration for each installed item.

Internal User

Users who are internal to your organization, such as managers, agents, and other employees.

interactive features

Responses that the virtual agent (bot) sends to customers which give the customer an option to interact. For example, a time picker gives the customer time slots to choose from when making an appointment.

J

Glossary terms are grouped alphabetically.

Java keystore

A repository of security certificates – either authorization certificates or public key certificates – plus corresponding private keys.

JSON Web Token (JWT)

A compact and self-contained way to securely transmit information between parties as a JSON object.

K

Glossary terms are grouped alphabetically.

L

Glossary terms are grouped alphabetically.

Logic and automation

Business automated application processes. You define logic and automation using flows. A flow includes a sequence of actions and a trigger. You can use a flow template or create a flow from scratch.

Automate all the work in your application by adding logic and automation. For example, you can build a flow that sends a notification to the admin when someone makes a request.

Logic and automation

M

Glossary terms are grouped alphabetically.

major case

A case that contains information about a specific issue that impacts multiple customers, like a system-wide outage. It is not associated with any accounts, contacts, or consumers; customer-specific information resides in the associated child cases. Major cases are also called parent cases.

matching rule

A rule that captures cases with specific case attributes that meet the matching rule criteria and routes them to the best-equipped customer service agent.

N

Glossary terms are grouped alphabetically.

natural language understanding (NLU)

A capability that enables the system to learn and respond to human-expressed intent. By entering natural language examples into the system, you help it understand word meanings and contexts so it can infer user or system actions.

O

Glossary terms are grouped alphabetically.

order

An order is a confirmed request for the delivery of goods and services at specified terms. Alternatively, it's a quotation that is accepted by a customer.

P

Glossary terms are grouped alphabetically.

Pipeline

Configuration for deploying an application to different environments.

Portal Banner widget

This widget showcases announcements, highlights new products or features, and communicates important information on the portal page.

Portal Browse Taxonomy widget

This widget displays hierarchical taxonomy topics, providing users with a seamless navigation experience to access knowledge articles and catalog items through the widget navigation pane.

Portal Catalog Quick Links widget

This widget displays catalog items based on specific filter criteria. It enables admins to add an image, icon, name, and description on each card.

Portal FAQ widget

This widget displays a curated list of frequently asked questions (FAQs) from a selected knowledge table on the portal. This feature empowers users to find answers to their queries without having to reach out to customer support or navigate through multiple knowledge article pages. Additionally, this widget provides the flexibility to filter the FAQs using options available in the main navigation.

product offer

A product offer represents entities that can be ordered from the catalog. An offer includes pricing information and add-on services like warranties, service contracts, maintenance contracts, or entitlements.

product model

A product model is a specific version or configuration of a product. Product models provide customer service agents and customers with a common understanding of the products that are being used.

parent case

A case that contains information about a specific issue that impacts multiple customers, like a system-wide outage. It is not associated with any accounts, contacts, or consumers; customer-specific information resides in the associated child cases. Parent cases are also called major cases.

post case review

A document written after the case has been closed captures details about a resolved case, including a summary of the issue, affected assets, root cause, resolution, and any preventive measures.

proxy contact

The proxy contacts are employees within a company who are not fulfillers or do not have other CSM-specific roles. This role enables employees to create cases for customer accounts and contacts, and also allows them to be proxy case contacts on behalf of customers.

Q

Glossary terms are grouped alphabetically.

quote

A quote is a formal offer for products or services that are proposed to a customer at specific prices and payment terms.

R

Glossary terms are grouped alphabetically.

requester

A consumer or a customer contact who interacts with a virtual agent or live agent through a chat.

resource generator

A configuration that provides resources such as a knowledge article, a set of cases, or a field value that you can use in providing recommendations in Recommended Actions.

S

Glossary terms are grouped alphabetically.

Security

Roles and access controls to limit who can use your application.

Service Model Foundation

A foundational data model framework that customers can use to create structured and flexible data models to represent their business needs. For more information about the Service Model Foundation overview, see Service Model Foundation overview ↗.

Service Level Agreement (SLA)

An agreement that specifies the time within which service must be provided. SLA definitions are configured to include the necessary information to create and progress SLAs for customer service cases.

Service Level Agreement (SLA) definition

A definition that includes the timings, conditions, workflows, and other information required to create and progress task Service Level Agreements (SLAs), enabling you to use an SLA system for your organization's tasks.

special handling notes

Notes, created with the Special Handling Notes application, that bring important information about individual records to the user's attention, and can be assigned a status, a priority, and an expiration date. Special handling notes can be displayed in different ways: in an embedded list or a related list on a record form or in a pop-up window that displays when you access a form.

U

Glossary terms are grouped alphabetically.

user input control

The format of the response choice given to the user, for example, "Static Choice" where a user chooses from a predefined list.

W

Glossary terms are grouped alphabetically.

webhook

An HTTP-based callback function that allows lightweight, event-driven communication between two application programming interfaces (APIs).

widget instance options

These options enable admins to modify the data, presentation, and behavior of the widget. Each instance of the widget can be configured to look and behave differently.

V

Glossary terms are grouped alphabetically.

Virtual Agent

Virtual Agent is an AI-powered conversational chatbot that provides instant resolution to common requests, increases customer satisfaction, and keep agents focused on more important issues.