

Audience

Audience

This is an experience lab that introduces the possibilities in the platform for CSM and App Engine. **No technical expertise or prior experience is required.** Participants are free to observe the content or engage hands on with the course material.

Service Definition of Terms

Personas

Types of Fullfillers:

- Agent
- Vendor Manager
- Finance Support
- Claims Manager
- Service Representive
- Stakeholder Relations Manager
- Procurment Officer
- Registar
- Franchisor

Types of Requesters:

- Customer
- Vendor
- Client
- Franchisee
- Contractor
- Student

(i) NOTE

A requester is someone who asks for the work to be done, while a fulfiller is someone who does it. The ability to carry out these actions ties in closely with roles and therefore impacts ServiceNow licenses. Whilst these two types of users are the most common, there are others who use the instance too.

Task types

- Case
- Incident
- Request
- Problem
- Defect
- Claim
- Exception
- Question
- File number
- Reference number
- Ticket

CSM Agent Workspace Overview

Overview

In this section, we will walk through how a Service Agent, like John, keeps track of all the requests, cases and complaints assigned to him and his team. He will identify where he needs to spend his time thanks to the out of the box agent workspace and work on the cases that require escalation and attention.

Personas

John Jason	Customer Service Agent
	John Jason is an experienced customer service agent known for his exceptional communication skills and commitment to providing top-notch service. With a friendly and approachable demeanor, he is skilled at actively listening to customers' concerns and finding effective solutions to their problems.

Preventing important cases from

falling through the cracks

1. First, we need to pick the right user. Click the user profile picture and select Impersonate user.

round and do your Check k ext	raight shot to the moon with new best work yet!				• • • •	10	 A Profile B Preferences Instantionalite user Execute role
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2. Search for 'John' and select the service agent John Jason.

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3. We will now navigate to the purpose-built agent workspace. Click on Workspaces and select CSM/FSM Configurable Workspace.

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C\$000001	2023-05-24 04:58.47	Resolved	1 - Critical	issue with router	Open tasks by priority	
C50000725	2016-06-02 08:48.50	New	1 - Critical	Router with VolP channels		
C\$0000727	2016-06-02 14:49.55	New	1 - Critical	Router firmware upgrade		
CMP600001	2020-11-01 00:34:31	Under Raview	2 - High	Product cid not perform as per specifications, did not meet expectation		21
C\$0000870	2023-01-06 00:14:03	Open	2 - High	Router performance issue after software upgrade		53
C50000701	2016-06-02 09:09:40	New	2 - High	Rover Recovery		
CMPLODDO	2020-11-01 00:47:29	Review Complete	3 - Moderate	The product was broken when it arrived		
CHPL00005	2020-11-01 01:00 53	Open	3 - Moderate	Unhellpful staff which unable to answer any questions	1 - Criticul 4 12%	2 - High 2 - Moderson 3 10%
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View all						

- 4. You are now on the Home page of the agent workspace that comes out of the box. Locate these 3 items by scrolling through the page:
 - Important Items
 - My Active Cases
 - My Team's Cases

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CMPL0001019	Product came damaged	Boseo	· C · Lour	Open	John Jason	2022-08-24 23:18:44
CMPL0001013	My refund is incorrect.	Boxeo USA	# 4 - 5per	New	lemptyl	2023-06-18 15:01:03
C\$0001252	Outage: SUIT-BOX-4896 - ACME Corporation Analytics Suite 2016	Bowo	· 1 · Critical	Awaiting Info	Emily Jason	2023-07-17 23:11:49

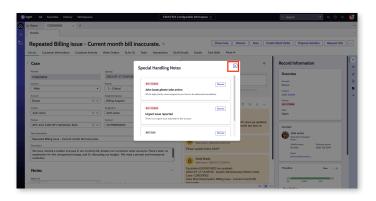
5. Under the Important Items, we see that there is a case where the SLA is breached, we need to escalate the case immediately. Click on the number in the SLA breached tile to be taken to the list of cases.

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6. On the list, we can see the case, which SLA is breached, stage, and by how many minutes/days alongside other information. Click on the case number to be taken to the case record.



7. First, you'll see **Special Handling Notes**. These notes automatically pop up based on the values on the case. You can have multiple special handling notes to alert your agents for better customer service. Click **X** to close the special handling notes window.



8. On the case page, we can see all the details such as customer information, work orders, SLA, tasks etc. John can also see the details about the issue to quickly decide the next steps to resolve the issue.

Repeated Billing	issue - Curre	nt month bill inaccur	ate. \circ	Close Case Discuss	Save Creat	e Work Order Propose Solution Request I	nto
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		despite our consistent order amounts. Th ing our budget. We need a promot and t		Prease update these ASAPI		Enal Microbilicamples.	

9. John will leverage out of the box features to search for similar cases that were resolved and look for helpful knowledge articles. Click on the Agent Assist icon as shown on the screenshot below

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			involutate.	uly culter	2024

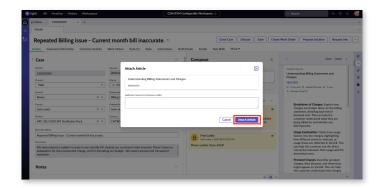
10. Click on the hamburger icon as shown on the picture to see all the out of the box search options. Currently you are seeing all similar resolved cases. Click on Knowledge Articles.

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Description			Work nature + 2020-08-59 20.37-40			
	our monthly bill, despite our consistent order am e. and it's disnaptine our badget. We need a pror		Please update these ASAP!		No Matches	

11. We can now see relevant Knowledge Articles that gets surfaced automatically. Click on the first article and then click **Attach** to attach it to the case and share it with the customer.

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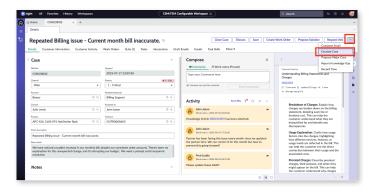
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Notes	^		Prorated Charges: Des charges, their purpose, might appear on the bit the customer understa	and when they II. This can help



(i) NOTE

If you include 'Additional Comments (Customer Visible)' before clicking on Attach Article, the article will be visible to the customer via the customer portal including your comment.

12. Finally, John will escalate the case before moving on to other cases in his queue. Click on the three-dot icon and select Escalate Case.



13. On the Case Escalation page, select these values:

Field	Value
Reason	Lack of Progress
Escalation Trend	Declining
Watch List	Fred Luddy
Escalation Justification	Need more help - partner is having repeated billing issue.

Click Save.

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Need more help - partner is having repeated billing issue				

14. Click on the Details tab to go back to the case. Observe the escalation that is automatically attached to the case.

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APC 42U 3300 SP1 NetShelter Rack O Q	CNTR0000603 0 9.	2023-09-18 22:22:08 - John Jason (Work notes)	being billed for and identify any
Short description		Case: C50020002 Case Short Description: Repeated Billing issue - Current month	discrepancies.
Repeated Billing Issue - Current month bill inaccurate.		bill inaccurate.	Usage Explanation: Clarify-how-usage factors into the charges, highlighting
Description		How now	how different services, features, or usage levels are reflected in the bill. This
We have noticed a sudden increase in our monthly bill, o exploration for this unexpected change, and it's disrupti- resolution		But Nach	can help the customer see the direct connection between their usage and the associated costs.
		Escalation ESC0001004 has been approved.	Prorated Charges: Describe prorated
Notes	^	Administration	charges, their purpose, and when they might appear on the bill. This can help the customer understand why charges

Great Job! John now has escalated the case and added his manager as watch list. He did all this work by using out of the box features!

You can also create an incident, problem or a change request right from this case as shown below. For example, if the billing issue was due to the billing software that is used, you could easily create an incident right from the case and assign it to the IT team.

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15. We will continue working on the agent workspace. Click on the hamburger icon to go to the case and task lists assigned to John.

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Web Account Baseco	1 - Critical Anigement group 0 0 Billing Support	Activity 7 Q if -	© 2 min read © updated 25d sps ⊕ 3 view & Average rating 0.5
Contact Alie Lewis Protect	Anipuel to John Josen Contact	C 0 C C	Breakdown of Charges: Explain how charges are broken down on the billing statement, detailing each fee or iteratived cost. This can help the outcomer understand what here are
APC 42U 3100 SP1 NetShelter Rack Stort decription Repeated Billing Issue - Current month bill ina	© Q CNTROBOORDS	O 0. Cose: 50002002 Cose: 50002002 Cose: 50002002 Silver Description: Repeated Billing Issue - Carrent month bill Insocription Silver sure	Usage Explanation: Clarify how usage factors into the charges, highlighting
	thly bill, despite our consistent order amounts. There's by 's disrupting our budget. We need a prompt and transpar		how different services, features, or usage levels are reflected in the bill. This can help the customer see the direct connection between their usage and the associated costs.
Notes		A Advant Account Weak account - 2022 (P) 10 22200.36	Protated Charges: Describe prototed charges, their purpose, and when they might oppear on the bill. This can help the outprover understand why charges

16. John has quick access to cases and tasks that matter to him. These lists are automatically updated and always show real-time data.

Lists My Lists	 My Cases II Lat infinited 2m apr. 	13					061	Edit Export	New
My Cases	Number	Short description	Action status	Contact	Account	Consumer	Channel	State	Price
My Open	C\$0000001	 inser with router 		Julie Lewis	Boxeo	(empty)	Web	Resolved	•11
Unassigned for my	C50001400	Issue with Router, Router Not working	· Needs attention	(empty)	Avid Corporation	(empty)	Web	Awalting Info	
V Case Task	C50001401	Battery is not working properly		Alex Linde	Advanced Reuting Components	(empty)	Web	Open	
My Case Task	C\$0000725	Router with VolP channels		(empty)	(empty)	(empty)	Web	New	• 1-
My Open Unassigned for my	C50000871	Acme Analytics performance degradation		(empty)	(empty)	(empty)	Web	Open	
AI	C\$0000727	Router firmware upgrade		(empty)	(empty)	(empty)	Web	New	•1-
 Complaint Cases 	C50001402	Unable to access - Need Help		(empty)	Dateo	(empty)	Web	Open	
My Complaint Coses My Open Complain	C\$0000870	Router performance lisue after software upgrade		(empty)	(empty)	(empty)	Web	Open	•2-
Unassigned for my	C\$0000701	Router Recovery		(empty)	(empty)	(empty)	Web	New	• 2 -
All Complaint Cases V Major Issue Managem	CMPL00005	Unheitpful staff which unable to answer any questions		(empty)	(empty)	Dee Sam	Web	Open	
Candidates Open	CMPL00003	The product was broken when it arrived		(empty)	(empty)	Gilly Parker	Web	Review Complete	•3
AI v Customer	CMPL00001	Product did not perform as per specifications, did not meet expectation	Booled internally	Julie Lewis	Boxeo	(empty)	Web	Under Review	•2
Accounts Partners Conserts	C\$0001001	Services Unavailable		Jim Matthews	Boxeo APAC	(empty)	Web	New	

17. Users like John can easily create their own lists when needed without creating IT Backlog. We will now create Critical Cases lists that are assigned to John. Click on My Lists.

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AI	C50000727	Router firmware upgrade		(empty)	(empity)	(empty)	Web	New	
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Unassigned for my	C50000701	Router Recovery		(empty)	(empty)	(empty)	Web	New	
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Candidates Open	CMPL00003	The product was broken when it arrived		(empty)	(ampity)	Gilly Parker	Web	Review Complete	
All V Customer	CMPL00001	Product did not perform as per specifications, did not meet expectation	Bidetineraly	Auto Lewis	Baseo	(empty)	Web	Under Review	
Partners	C50001001	Services Unavailable		An Mathews	Boxeo APAC	(enpty)	weo	New	

18. Click on Add new list

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	No ins country et	C\$0000725	Router with VoIP channels		(empty)	(empty)	(empty)	Web	New	• 1 - 0
		C\$0000871	Acme Analytics performance degradation		(emptyl	(empty)	(empty)	Web	Open	•1-0
-		C50000727	Router firmware upgrade		(empty)	(empty)	(empty)	Web	New	•1-0
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		C\$0000870	Router performance issue after software upgrade		(empty)	(empty)	(empty)	Web	Open	• 2 - 1
Te create a custom b	hd, select Add new list.	C\$0000701	Router Recovery		(emptyl	(empty)	(empty)	Web	New	• 2 - 1
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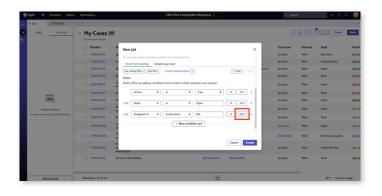
19. On the pop-up screen, click on List and select My Open.

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20. Populate List Name: "My Open Critical Cases"

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	CMPL00003	[view and man of [more man] view and other [0]			Gilly Parker	Web	Review Complete	
	CMPL00001	P Repectation	Cancel Create		(empty)	Web	Under Review	
	C50001001	Services Unavailable	Jim Matthews Boseo APAC		(empty)	Web	New	
	Showing 1-13 of 13							

21. On the pop-up screen scroll down to the filter criteria and click on AND as shown on the screenshot below:



22. On the first input field select **Priority**, in the second input field select is, in the third input field select 1-Critical. Click Create.

Dats My Date	- My Cases 📖			007	Export	
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	Number S	New List ×	Consumer	Channel	State	
	C\$000001 }	The can create another version of an axis ing lat or an orderaly new ane,	(empty)	Web	Resolved	
	C\$0001400 B	Start from existing Create your own	(enoty)	Web	Amaiting Info	
	CS0005401 8	Editor	(ampty)	Web	Open	
	C\$0000725	Build a filter by adding conditions that contain a field, operator, and value(s).	(empty)	Web	New	
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Here's how your list should look:

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Congratulations! You helped John to efficiently work on and prioritize his cases. Next chapter we will see how one of your customers will log a complaint using out of the box customer portal and then John addressing the complaint leveraging automation.

Modifying agent availability

Before we move on to complaint management and portal, let's set John's status as Available so that when your customer Julie wants to connect to John via live chat, the chat gets routed to him.

1. Click on the inbox icon as shown below:

	Favorites H		C	CSM/FSM Configural	de Workspace 🏠)			Q. Sea	xh	۹ O	• (
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P		Number	Short description	Action status	Contact	Account	Consumer	Channel	State T	Priority T	Assigned to 7	Upda
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		C\$0000871	Acme Analytics performance degradation		(empty)	lenotyl	(enaty)	Web	Open	• 1 - Dritesi	John Jason	2023

2. Click on Offline and choose Available from the list.

🕞 ngm All Favorites H	story Workspaces	CSM/FSM Configurable Works	tece (t	0, Search	n O n 🍯
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As work items are assigned, they will appear in this parted	Protect APC 42U 3300 SP1 NetShelter Rack O Q	Contract CNTR0000603 0 0.	Escalation ESC002004 has updated: 2023-09-18-22:22:38 - John Jason (Work notes) Case: C50020002 Case: Short Description: Repeated Billing issue - Curren	detailing each fee or cost. This can help ti customer understan thry are being billed	he d what
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	Notes	^	Bohn Jason With rotas + 2023-09-18-22-08.36	their usage and the costs.	
			- 1		$\leftarrow \rightarrow$

Great! With John's status now set to Avaialble, we can move on to the next section!

Complaint App Overview Demo

Overview

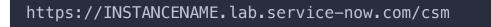
In this section, we see how an external stakeholder/user can log a complaint using the out of the box portal. Julie, the external user, will use the out of the box portal to log a complaint.

Personas

Jule Lewis	External Stakeholder (Requester)
	As an external stakeholder, Julie's complaint should be handled with great care and attention. It's important to address her concerns promptly and effectively to maintain a positive relationship and reputation with her and others who may be observing how your company handles such matters.

Experience URL

For Julie's portion of the workshop, copy the URL below and paste into your browser replacing INSTANCENAME with your lab instance name. Your instance name is formatted similar to utah2-ml-sep20-985-001



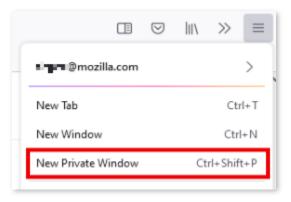
Customer Experience

1. For this exercise, we'll need to open a new browser session so that we can see both John and Julie's experiences.

If you are using Chrome, open a New Incognito Window on your browser.

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	Notes Meth lat	^ 	Adms. Assen Was were + 2023 0F 05 12 50 36 Knowledge Article K00010004 has been attached.	Tineine	New c. q.

If you are using FireFox, open a New Private Window.



2. Now, on the incognito window paste the external portal URL that we just

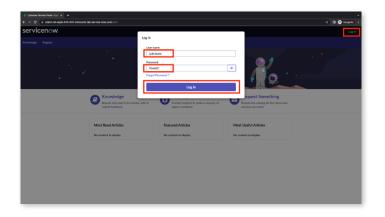
copied. Then hit Enter or Return key on your keyboard so that you can be directed to the portal.

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servic	cenaw.				Log In
			Find Answers, Faster Find the answers you need when you need them	No.	
		Browse and search for articles, ran submit feedback.	e or Get help Contact support to make a request, or report a problem.	Request Something Browne the catalog for the Rems and services you need	
		Most Read Articles	Featured Articles	Most Useful Articles	
		No content to display	No centent to display	No content to display	

3. On the portal page, click Log in and enter:

Field Name	Password
User name	julie.lewis
Password	Portal1!

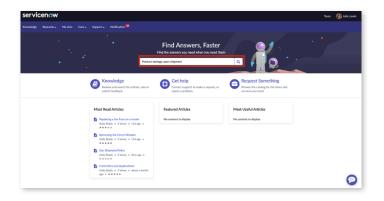
Click Log in



4. What you see on the screen is the out of the box portal. Your organization will change the look and feel, but the out of the box portal is already full of functionality with service catalogs, knowledge articles, virtual agents and chat bots etc.

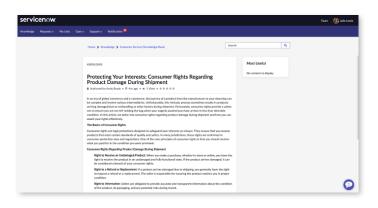
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5. Julie received a damaged product. First, she wants to see what her next steps could be to get support from your company. Go to the search bar as shown below and type **Product damage upon shipment** and press **Return** or **Enter** on your keyboard.

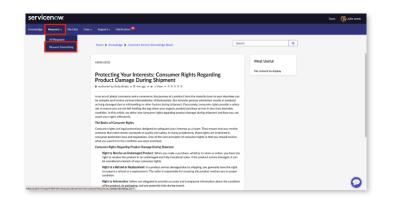


6. You can now see knowledge articles. Click on the first knowledge article to display.

servicenow			Tours 🚯 Julie Lewis
Knowledge Requests + My Lists Case +	Support • Notification 10		
	Home > Search	Product damage upon shipment Q	
	Sources	All results for "Product damage upon shipment"	
	м	Protecting Your Interests: Consumer Rights Regarding Product Damage During Shipment	
	Knowledge Bases Catalogs	Into consumer rights regarding product damage during shipment and how you can assert your rights for in the condition you were promised. Consumer Rights Reparding Product Damage During Shipment Right!	
	Case	Article: KB0010003 - Published Today	
		Shipment Delays: Causes, Imports	
	FILTERS	to maintain their operations, meet customer domands, and uphold their reputations. However, shipment, and logistical challenges. Understanding the custom impects, and strategies for mitigating shipme	
	Knowledge Bases Cear N	Article: KB0010001 - Published Today End of results	
	Category • People	LAU INIBALI	
	Author H		
	Last modified +		
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			9



7. Let's assume that Julie decides to log a complaint. Click on Requests and select Request Something.



8. On the screen, search for Log a complaint as shown in the screenshot below

wledge Requests MyLists Case	 Support Notification² 				
	Home > Castomer Service	> Support	Log a	complaint Q	
	Categories Respect Something	Support			
	Services Support	Create case for a senduct Submit a case about your product and our support team will assist you.	Create case for an order Submit a case about your order and our support team will assist you.	Create Case for Install Base Please preside the following details to help as previde you assistance at the earliest.	
		View Oxtain	VieeDatalis	View Details	
		Log a Complaint Log a Complaint	Log a Product Complaint Log a Product Complaint	Report a Customer Support Report a Customer Support have	
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	FILTERS Log a Product Complaint		
	Catalogs Dear All		
	Category * Acchy		
	C Support		
			6

9. Fill in the form as followed:

Field Name	Value
Complaint Type	Product
Product	ACME Corporation ACME DM
Category	Defective Product
Sub Category	Broken
Short Description	Product broken upon delivery
Date issue occurred	Click on the calendar icon. Select today and click OK. You can also type in the answer instead of using the calendar widget
Complaint Details	The product is shattered and can't be used

Field Name	Value
List the additional parties involved in the complaint	Click on Add button. On the Involved Parties field, select Mike Rogers. On the Type field, select Co- Complainant

Click Submit

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	Log a Complaint Ing a Complaint Phase position for following abately to provide you uninterest within conferen	5.000	
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(i) NOTE

Note that once you type in the Short Description, the system automatically displays knowledge articles and related services. If you want to, you can disable this feature

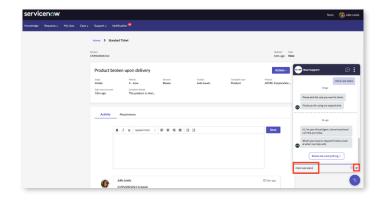
10. See that Julie is presented with a complaint record that she can always come back to and track progress.

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	Hune > Standard Ticket	
	kelor MRXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
	Product broken upon delivery Actions -	
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11. Julie can also interact with the Virtual Agent that is out of the box enhanced with AI capabilities and can be used to log requests, check case/complaint statuses, getting routed to a live agent for chat or more! Click on the Virtual Agent icon.

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nowledge Requests + My Lists	Case + Support + NetStadon 19	
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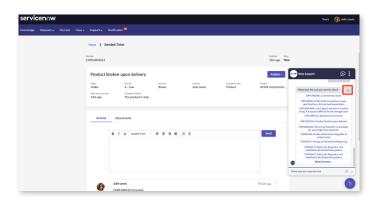
12. On the Virtual Agent, Julie can see her past conversations and start a new one. Type check case status



(i) NOTE

Instead of typing what you need, you can also click on **Show me** everything to see all the list of requests you can accomplish with the VA. In the instance you are using right now, we have a couple out of the box requests enabled.

13. Virtual Agent presents all the cases and complaints that are being logged by Julie. Click on the **magnifier icon** to search for the complaint.



14. Type Product broken on the search bar. You'll see that Virtual Agent returns

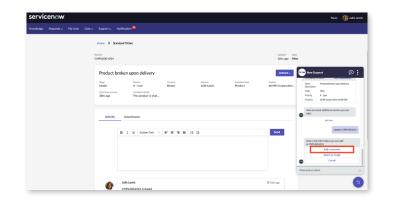
the complaint that you just logged. Select the complaint.

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	Home > Standard Ticket				
	Number CMPL0001054			Updated State 32m ago New	
	Product broken upon delivery	Accent Contract	Constaint how	Actions -	Support 🕑
	Stare Picety Intaliee 4 - Low Date hour assured Complicit studie 1.5m ago The product is shar	Bereo Ade u		ACME Corporation	liter ago
					yeer Virtual Agent. Let me know haw I do you taday.
	Activity Attachments			what's	s your issue or request? Or take a look. at I can help with.
		· = = = = = = = =			2m ago
	B I V System Fort	· · · · · · ·		Seed	rick the case you want to check
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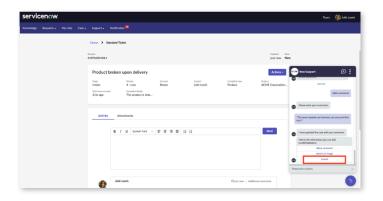
15. Select Update CMPL0001001 (the complaint number may be different). Julie can create and update their cases, requests, and complaints without any effort from the support team!

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	Home > Standard Ticket			
	Number CMPL0001014		17m ago New	
	Product broken upon delivery		Actions - New Support	•
	Stept Drivity Account Intake 4 - Low Baseo Date Investment Complete status	Contact Complicit type Julie Lewis Product	ACME Corporation	
	19m ago The product is shat		Complaint Case CMPL0001014	
	Activity Attachments		Stort Productioners upon delivery description Store New	
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			Here are some additional actions pro can tak Update CoPL0002104 Overk another care	66.
			Contact on agent	
			Please pick an option.	-
	Aulie Lemis CMPE0201016 Created		© 57m aga	Û

16. Select Add a comment and type The issue impacts our business, can you prioritize this?



17. Now you added a comment to the complaint. Select **Cancel** in the new Virtual Agent question as you don't want to do any other updates.

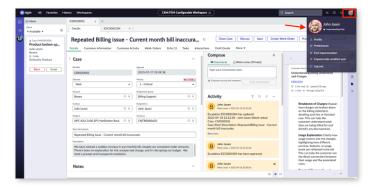


Congratulations! Your customer was able to submit a complaint so easily. All this with out of the box features, including the Virtual Agent! We will now go back to John and start working on this complaint.

Customer Service Agent Experience

In this section, we see how an agent works on a complaint in an efficient way using out of the box workflow automation. Note that in the following App Engine session we will see how you can modify this workflow to fit your needs with no-code tools.

1. Go back to the window where you have logged in as John. Let's first make sure that you are still impersonated as John Jason. Go to the profile picture on the right-hand side. It should show John Jason.



2. Go to Inbox and see that the complaint request got routed to John Jason. Click Accept.

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	Repeated silling issue - Current month bill inaccurate.		usage factors into the charges, highlighting how different
	We have noticed a sudden increase in our monthly bill, despite our consistent order amounts. There's been no explanation for this unsequented change, and it's disrupting our budget. We need a prompt and transparent resolution	Abin Jasan Work name + 2023 04-58 2020 08 Excelation ESC0001004 has been approved.	services, features, or usage levels are reflected in the bill. This can help the customer see the direct connection between
	Notes	A John Jason Nuri rom = 2023-09-58 2208.26	their usage and the associated casts.

3. On the complaint record, you'll see the **Complaint playbook** which is the out of the box complaint process. We will go through this process together.

(i) NOTE If Special Handling notes pops up, simply click on the X to close the box.

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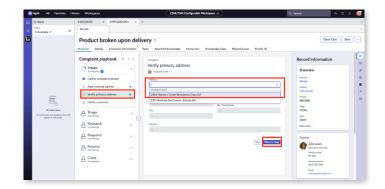
4. Click on Gather complaint details to see the information captured by Julie.

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5. Click on Add involved parties to see the co-complainant that Julie already added. See that John can add more here if there is need. For now, we will leave this as is.

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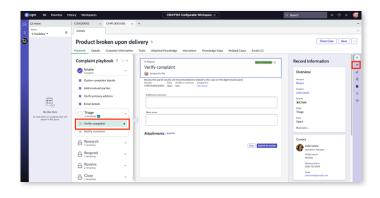
6. Click on Verify primary address and click on the Address field to select the first address that pops up. Once the address is populated, click on Move to Triage.



It may take a second for the complaint to move to next stage

Note that the **Intake** section is now completed, and Complaint is automatically moved to **Triage** stage. There has also been an automated email sent to Julie.

7. Click on Verify complaint. John wants to see if this is a legitimate complaint or not. First, he will check if there is already a similar open complaint to prevent duplicate effort. Click on the hat icon on the right. We call this Agent Assist.



8. On the Agent Assist panel see that you can filter for open complaint cases,

resolved complaint cases, knowledge articles etc.

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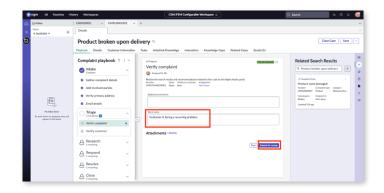
9. Stay on Open Complaint Cases and observe that there is a similar problem occurring for the same customer. So, this is a persisting issue.

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		A Notify customer	I	Attachments - Anna					
		Research ~		Peer Edwit for mines					
		A Respond							
		Resolve ~	1						
		Close v	1						

(i) NOTE

You can click on the complaint case to see more details. For now, we will leave this as is and move on.

10. On the Verify complaint, on the Work notes section enter Customer is facing a recurring problem and click on Submit for review.



11. Observe that the triage stage is automatically completed, and complaint is moved to research stage. Now, click on the Emails tab as shown below to see all the automated emails sent to Julie.

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	2023-09-18 22:49:14	Julie.lew/s@example.com	Case CMPL0001001 opened - Product broken upon delivery	send-ready	Gemptyl	Product came damaged Number Completinge Category CMPL0000017 Product Detective?hs
Line be block by Annual series of the set	2023-09-16 23:00.12	Jalio kwósłęwanyk ozon	Care CMPEODEDED in in Thige stage	send-ready	demptod	Acapan Angela Mana Andra Umentifike
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12. Click on Playbook tab. Observe the new tasks that are assigned within the research phase. Click on the three-dot icon and then select Expand All Stages as shown below:

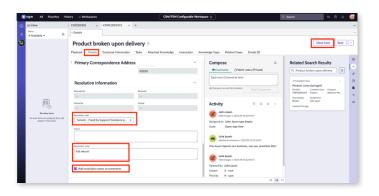
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	Altachengs-werke Alta		

13. These are all the remaining out of the box tasks and steps that your team can take to resolve complaints. For this lab, we will stop following the steps here and close this complaint.

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14. Click on Details tab. Scroll down to the Resolution Information section. Fill in these 3 fields:

Field Name	Value
Resolution Code	Solved – Fixed by Support/Guidance provided
Resolution Notes	Full refund
Add resolution notes to comments	CHECK THE BOX



Click on Close Case

O TIP

If you go back to the incognito window where you had the external portal open, you can see the updates that Julie can see immediately, such as the case status or comments added by herself or John.

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Congratulations! John was able to work on the complaint and follow the right steps thanks to out of the box processes.

Reporting

Personas

Fred Luddy	Manager
	Fred is responsible for overseeing and leading a team of customer service representatives and ensuring the delivery of excellent customer support. His primary role is to manage and optimize customer service operations to meet or exceed customer expectations.

Streamlined Insights - Enhancing

Service Manager Data Reporting

In this section, we see how a manager can leverage reporting in ServiceNow to keep track of his company's and team's performance.

1. Let's get started! First, we need to pick the right user. Click the user profile picture, if you are still impersonated as John Jason, select End impersonation.

	ve landed here, Jo raight shot to the moon wit best work yet!		at make it easier to na	vigate		Profile Preferences Profile Preferences find imperianation Impergraphs another user
eview your worl	k					Log out
Assignments III					Oritical Tasks	New tasks
Number	Created	State -	Priority -	Short description	4	10
C50020030	2021-10-22 13:49:26	Open	1 - Critical	Billing issue - Current month bill inaccurate.		
C\$0020002	2023-07-17 23:09:38	Open	1 - Critical	Billing issue - Current month bill inaccurate.	Open tasks by priority	
C50020001	2023-07-17 23:09:29	Open	1 - Critical	Billing issue - Current month bill inaccurate.		
C50000001	2021-05-16 04:58:47	Resolved	1 - Critical	issue with router		
CMPLODODS	2020-10-24 00:34:31	Under Review	2 - High	Product did not perform as per specifications, did not meet expectation		21
C50001087	2023-07-13 13:00:00	Open	2 · High	Move in move out question		Si
C50001089	2023-07-10 10.00.00	Open	3 - Moderate	Move in - Move out question		
C50000052	2017-09-06 14:05:21	New	3 - Moderate	Router overheating after firmware upgrade		
C50001401	2019-02-15 21:57:04	Open	4 - Low	Battery is not working properly	1-Critical 4 19%	2 - High 2 - Moderate 2 10% 2 19%
C5000081	2019-08-23 04:39:45	Open	4 - Low	Need 2 additional cabinets on floor 3	4-50v 13 425	

2. Click the user profile picture, select Impersonate User.

ound and do your Check it out	best work yet!				<u>.</u>	10	 A Prefile © Preferences
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caooovocd	2018-10-11 19:11:34	Open	6 - LOW	Trave a pending charge request		Open tasks by priority	

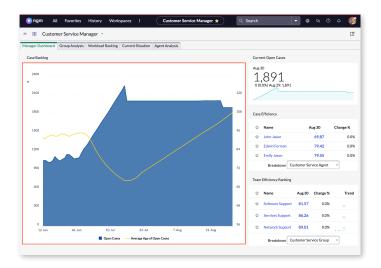
3. Search for Fred Luddy and click Impersonate User.

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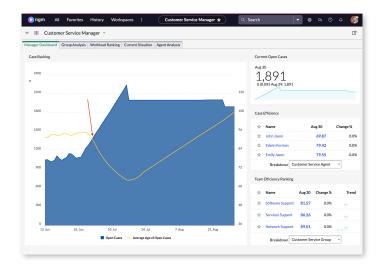
4. Click on Favorites and then click on Customer Service Manager dashboard



5. What you see on your screen is a sample **service manager dashboard**. CSM OOB provides you template dashboards that you can edit based on your needs. Observe that on the highlighted graph below, the number of open cases is increasing but the average age of open cases is decreasing.



6. Let's understand this trend. You can click anywhere on the lines to drill down into the data. For this lab purpose, click on the **yellow line** where it intersects with the blue line.



(i) NOTE It's ok if you click somewhere else, you'll still be able to follow along

7. We will now discover the breakdown of this trend to understand what products, customers, channels etc. Is contributing to it. Click on the list icon as shown below

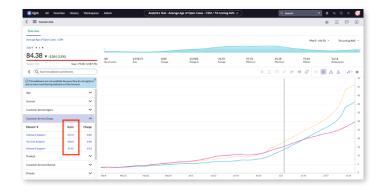


8. Observe that you have multiple variables that you can drill down to. Let's first

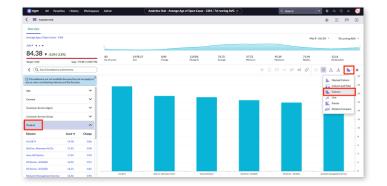
click on Customer Service Group



9. We can now see that within the Customer Service Group, Software Support has been the fastest and Services Support the slowest.



10. Let's now see which products have been impacted by this trend. Click on Product. Then click on the line graph icon to change the view to columns. We can see that cases related to Iris 5875 have been taking the longest.



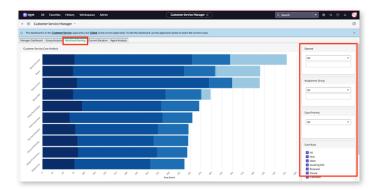
11. Let's now see which channels contribute to this trend. Click on **Customer** Service Channel. Observe that cases that come in via chat has been taking the longest to resolve.

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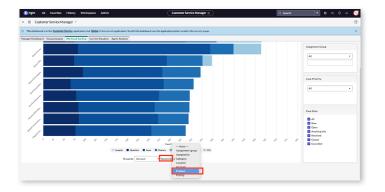
12. Now Fred has a better idea on what is contributing to the case resolution time. Let's now click on the **back** icon to go back to the dashboard.

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13. Click on Workload Ranking. Observe that you now have case analysis per customer and interactive filters to drill further in data.



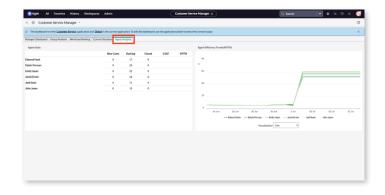
14. Scroll down and select Stacked by Product.



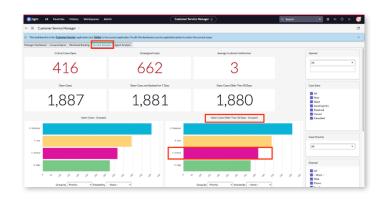
15. Observe that you can now understand which products are resulting in most cases per customer.



16. Let's see another tab. Click on Agent Analysis. You can now see the agent stats and agent efficiency. Remember that all this is real time data!



 Finally, click on Current Situation. We can see that there are open cases older than 30 days. On the Open Cases Older than 30 Days bar chart, click on 1-Critical.



18. You can now see the detailed list of all the critical cases that are older than 30 days. Let's add a work note to these cases to get the agents' attention. Of course, we won't be doing this one by one! First, click on the check box as shown below:

1	7 © Cases V	ew Case Updated + Search								*	Actions an selecte	irens. Y New
	Sve - true × Oper	ed ++ javascript;gs.davsAge(30) + Priority + 1 - Critical										
•	Number	Short description	State	Actionatatas	Contact	Account	Assigned to	Assignment group	Princity	Channel	Opened	Updated =
	C\$0620082	Billing issue - Current month bill inaccurate.	Open		George Warren	Borea	John Jason	Dilling Support	1 - Critical	© Web	2023-07-17 16:09:38	2023-08-53 10:49:23
	C50001252	Outage: SUIT-BOK-4896 - ACME Corporation Analytics Suite 2015	😑 Awaiting Info	Needs attention	Julie Lewis	Doese	Entity Januar	Network Support	1 Critical	© Web	2023-06-29 10:44/21	2023-07-17 16:11:49
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	C\$0002151	Issue with Fax machine	Availing into		(empty)	(expts)	(empty)	(empty)	1-Critical	Enal	2023-07-0123:47:36	2023-07-17 16:00:00
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	C50690085	Billing iowe-Current month kill inaccurate.	Copen 3		Julie Lowis	Borea	John Jason	Dilling Support	1 Critical	© Web	2023-07-17 16:09:29	2023-07-17 16:09:43
	C30001455	Urgent access to systems required	O New		(empty)	(expts)	Beth Anglin	(english)	1-Crisial	1. Phone	2023-07-0812226.04	2023-07-1716-09.50
	C50002111	Email server is down.	O New		(empty)	(empty)	Both Anglin	(onuts)	1 Onical	1. Phone	2023-07-0218/56/35	2023-07-17 14:09:10
	C50002189	Excellment issues with MFA	O New		(empty)	(erats)	Beth Anglin	(consta)	1 - Critical	C Web	2023-07-01 12:10:45	2023-07-57 16-09-09
	C50001414	My camputer is not detecting the headphone device	O New		(empty)	(empth)	Deth Anglin	Network Support	1 Original	E trul	2023-07-1118-36-48	2023-07-1716-09-09
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	CS0001546	Request Mass Passward reset	O New		(empty)	(erate)	Beth Anglin	Network Support	1 Critical	© Web	2023-07-09/25:05:37	2023-07-5716-09-06
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	C50001085	Poster installation incomplete	O New		CalCustomer	Bores	Beth Anglin	(empty)	· 1-Crisial	1. Phone	2023-07-1705-07-39	2023-07-1716-09-05
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	C\$0007237	Need access to the common drive.	O New		imphi	(craft)	Doth Anglin	(empts)	• 1-Critical	0 we	2023-07-0100-14-55	2023/07/17 14:09:0

O TIP

You could also select cases individually by clicking on the checkboxes beside the case numbers

19. Right click beside the Number column and click on Update Selected

• v	© Cases	View One Updated	- Search								+	Actions on selector	irens. Y
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	C500012	Show Visual Task Board	CME Corporation Analytics Suite 2016	ohi gnifiewA 😑	Needs attention	Julie Lewis	Boxeo	Emily Jason	Network Support	1 - Critical	© Web	2223-06-29 18:44:21	2023-07-17 14
	C\$00011	Group Dy Namber	be patched	😑 Anaiting Info		(ampty)	(empity)	(empty)	(empty)	1 - Critical	% Phone	2023-07-15-09:53:10	2023-07-17 14
	C\$000215	Bar Chart		Resolved		(ompty)	(empty)	(empty)	(cmpts)	1 - Critical	0 Web	2023-07-0123-28-46	2023-07-17 5
	CSOODSBC	Pie Chart	ty portal app	Resolved		(omptyl	(empty)	(empty)	(empts)	1 - Dritkal	S Enal	2023-07-05-20-43-01	2023-07-17 5
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	CSOCODOR	Equal >	abilitaccurate.	Open		Julie Lewis	Downo	Jahn Jason	Dilling Support	1 - Critical	O Web	2023-07-17 56-09-29	2023-07-17
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	C500021:	Data Management		O New		(omptyl	(empity)	Beth Anglin	(empts)	1 - Critical	% Phone	2023-07-02 18:54:35	2023-07-17
	C5000211	Create Application Files		O New		(ampty)	(empty)	Deth Anglin	(cmpts)	1 - Critical	© Web	2023-07-0112:10:41	2023-07-17 5
	C5000141	Import XML Show XML	g the headphone device	O New		(imptyl	(empty)	Deth Auglia	Network Support	1-Critical	S Enal	2223-07-11 13:26:40	2023-07-17
	C50002245	Unable to post content on	a Wild page	O New		(maptyl	(empiry)	Beth Anglin	(empts)	1 - Critical	© Web	2023-06-30 19:13:33	2023-07-17
	C\$0005564	Request Mass Password re	teet	O New		(ampty)	(empty)	Deth Anglin	Network Support	1 - Critical	© Web	2023-07-09-21:05:37	2023-07-17 5
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	C50001085	Router installation incomp	ikite	O New		Carl Customer	Boes	Beth Anglin	(empite)	1 - Critical	S. Phone	2023-07-17 01:07:39	2023-07-17 1
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	C50001510	Issue with Fax machine		O New		(impty)	(empty)	Deth Auglia	(empta)	1-Dritical	E Enal	2023-07-09-05:42:39	2023-07-17 1
	C\$0002233	Need access to the commo	on drives.	O New		innetvi	(empty)	Beth Angle	(emotal)	1-Critical	0.004	2023-07-0100-14:55	2023-07-17 1

20. On the form type: Please update these ASAP! to the Work Notes field and click Update.

ngm Al Favorites History Workspace	Admin	Case 🕸	Q. Search	• • • • •
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	Effecteds Major Case Information Skills Sp			
Watchild	8 8	Wark-notes list	8 0	
Additional comments				
Worknetos	Please update these ASAPI			

Congratulations! Fred was able to understand service trends, get a handle of current state and agent efficiency. Finally, act on critical cases with a single button!

Scale Digital Innovation with no-

code Configuration

Overview

In this section, we will see how a business analyst, Andy, can configure the tool to include new automated process to the out of the box complaint management so that he can satisfy an urgent business need: complaint investigations

Personas

Andy Brady	System Administrator
	As a ServiceNow System Administrator, Andy's primary responsibilities involve managing and maintaining the ServiceNow platform within an organization.

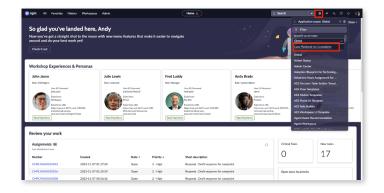
Create meaningful experiences for

your application users

1. First, we need to pick the right user. Click the user profile picture and select End impersonation this will take us to admin view where Andy can make his changes.

Ŷ	Cases \	iew Case Updated - Search							*	Free	d Luddy
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Acti	ve – true > Oper	ed <+ javascript.gs.daysAgo(30) > Priority = 1 - Critical								A Profile	
۹	Number	Short description	State Action status	Contact	Account	Assigned to	Assignment group	Priority	Channel	Op	
	C\$0002189	Enrollment issues with MFA	O New	(omptyl	(emptyl	Beth Anglin	(empty)	1 - Critical	@ wwa	207 © Preferences	
	C50020001	Billing/issue - Current month bill inaccurate.	(3) Open	Julie Lewis	Bares	John Jason	Billing Support	1-Oritical	· Web	20 🦉 Endimente	enation
	C50002111	Email server is down.	O New	(empty)	(empty)	Beth Anglin	(empty)	1 - Critical	S Phone	202 🗢 Impersonati	
	C50001655	Urgent access to systems required	O New	(empity)	(empty)	Beth Anglin	lompityl	1 - Critical	Is Phase	200 💿 Printer frien	dly version
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	C\$0002245	Unable to post content on a Wiki page	O New	(empty)	(empty)	Seth Anglin	(empty)	1 - Oritical	© web	202	-
	C50001843	Ungent access to systems required	O New	(emptyl	(emptyl	Beth Anglin	longtyl	1 - Oritical	S Enal	2023-07-0615:30:25	2023-08-38-56
	C\$0001085	Router installation incomplete	O New	CarlCustomer	Bares	Beth Anglin	(cmpty)	1-Oritical	1. Phone	2023-07-17-01.07.99	2023-08-18-14
	C\$0001725	Issue with Fax machine	O New	(empty)	(empty)	Beth Anglin	(empty)	1 - Oritical	% Phone	2022-07-07 15-24:41	2023-08-18 54
	C50001339	Issue with Concur Service	O New	(emptyl	(ompity)	Beth Anglin	(cmpty)	1 - Oritical	III Enall	2023-07-12 15:57:39	2023-06-38-14
	C50001566	Request Mass Password reset.	O New	(empty)	(empty)	Beth Anglin	Network Support	1 - Critical	© Web	2023-07-0921-05:37	2023-08-38-56
	C50001610	Issue with Fax machine	O New	(empty)	(empty)	Beth Anglin	demonstyle	1 - Oritical	S trail	2023-07-09-05:42:39	2023-08-18 16
	C\$0020002	Billing issue - Current month bill inaccurate.	Open	George Warren	Boxeo	John Jason	Billing Support	1 - Critical	© Web	2023-07-17 16:09:38	2023-08-38-56
	C50002237	Need access to the common drive.	O New	(emptyl	(empty)	Beth Anglin	longtyl	1 - Oritical	© Web	2023-07-0100:14:55	2023-08-38-16
	C50001139	San Diego Firewall needs to be patched	Availing Info	(empty)	(empty)	(empty)	(empty)	1-Oritical	S Phone	2023-07-15-09-53:10	2023-08-18-56
	C50001852	Cannot sign into the company portal app	Resolved	(emptyl	(emptyl	(empty)	(cmpty)	1 - Oritical	Si Enal	2023-07-05 20:43:01	2023-08-18 16
	C50002151	base with Pax machine	Availing Info	(empty)	(emptyl	(empty)	(cmpty)	1 - Oritical	C Engl	2023-07-0123-47:36	2023-08-38-16
	C50002152	Email server is down.	Resolved	(empty)	(empty)	(empty)	(cmpty)	• 1-Oritical	© Web	2023-07-0123-28-46	2023-08-18-16
	C50001252	Outage: SUIT-BOIK-4976 - ACME Corporation Analytics Suite 2016	Awaiting Info Needs attention	Julie Lewis	Bereo	Entity Jacon	Network Support	1 - Oritical	© Web	2023-06-29 18:44:21	2023-08-18 16
	C50001858	Cannot sign into the company portal app	(3 Open	(emptyl	(ompity)	(empty)	(cmpty)	1 - Oritical	S. Phone	2023-07-0521-58-21	2023-08-18-16

2. Now let's go to the right scope to before we start updating the playbook. Go to the Scope icon at the top right corner and select Case Playbook for Complaints



3. Now let's update the process. Go to All and type Process automation. Select Process Automation Designer.

Process autorij () RITES SUITS ESULTS	ed here, Andy to the moon with new yet!	menu features that	make it easier to r			- 21	, .
Process Automation Setting Started Now Designer # Process Automation Design					<u> </u>		•
 Flow Administration Teday's Executions Active Flows Context Definitions Intexand Small Flows Context Filtering Raise Event Queue Operations Databoard Sections 		(pps ready to install 986 eview apps to install		Instance Security C 8 Review notifications		
Assignments III	_				o	Critical Tasks	New tasks
Number	Created	State -	Priority +	Short description		0	2
C50009003	2018-10-11 19:11:34	Open	4 - Low	I have a pending change request			
CMPL0001009	2023-08-18 14:59:46	New	4 - Low	I can't figure out how to use this thing. It's way too di user!	flicult for the average	Open tasks by priority	,
CMPL0001005	2023-08-18 14:58:07	New	4 - Low	My service has been unavailable for way longer than	expected.		

4. Click on Complaint Playbook that has "Published" status.

Label	Application	Status	Active	Updated by	Updated
Complaint playbook	Case Playbook for Complaints	Draft	true	admin	2022-10-12 22:17:15
Complaint playbook	Case Playbook for Complaints	Published	true	admin	2022-12-02 08:44:08
Connectivity Troubleshooter	Customer Service	Published	onue	admin	2020-08-22 14:26:28

() INFO

In real life you would use the one in **Draft** status to try and test changes before publishing

5. Observe the lanes and tasks that were previously presented in the complaint case. This is the out of the box process that we will edit to include the investigation.

Complaint playbook	(3 Published)		Application: Case	Playbook f	(Properties) (Test) (Annual C
ntake	Triage	Research	Respond	Resolve	Close
Add howled parts 1 → mentory Verdy person and the second 2 monocolor Analyst particular 2 monocolor 2	Uetry compared 1 ≥ monotory Northy cattorier 1 ≥ also researce	Reverse legal implication 1 Implication over review for etc. 1 Implif	Compose enail 1	Propose resolution 1 ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ··· ···	Clore case 2 vv Nutly custamer 2 Met existsy 3 Met existsy

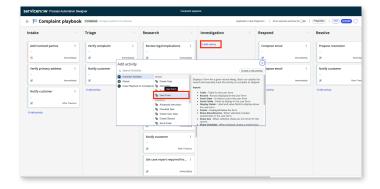
6. Click on the three-dot icon beside Research and select Add lane after.

Complaint playbook	(3 Published		Application: Case Playbook f	Properties Test Common C-
Intake	Triage	Research (1) Respond	Resolve	Close
Add involved parties 1	Verify complaint	Review legal implications Add lane before Add lane after Delete Lane		Close case
Inmediately	2 immediately	2 investing	imredately 2 immedately	2 im
Verify primary address 1	Notify customer 1	Product owner review for ot 1 Compose ema	-	Notify customer
8 Innelasiy	Ater Previous	2 innedately 2	immediately & Atter Previous	2 inv
Notify calamer 1 	© Add anniny	Worly data entitiement 1 2 monotogy Tillegeneration avge related. 1 2 monotogy Folgeneration 1 2 monotogy 6 data hanal - - - - - - - - - -	© Ad anny	© Add anthry

7. Type Investigation under Label and click Save.

Complaint playbo	DRANSBER Changes saved but not activated			Application Case Physical A. Show spectral activities (2) (m) (Properties) (Test) (Activities (2) (m)
1° Compliant playbor take Add involved particles 2 2 3 400 rowstord 2 3 400 rowstord 1 1 2 400 rowstord 1		Research Reventing implications Reventing implications Reventing implications Reventing implications Reventions Revent	Untitled Lane	Reaction controls.() Frequency () () () () () () () () () () () () ()
		Notify oustomer 1 Minr Previous Get case report required fro., 1 Investigation (Investigation) (Inve		

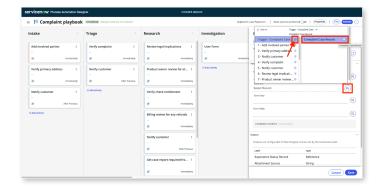
8. Under Investigation Lane, click on Add activity. Select User Form.



9. Click on the Automation tab

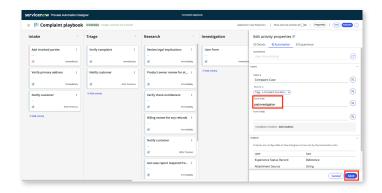
🕫 Complaint playbook	(Published) Changes saved but not activated		Application	x Case Playbook f Show optional activities (0) (300 Properties) (Test) (40044
ntake	Triage	Research	Investigation	Edit activity properties 2
Add involved parties 1	Verify complaint 1	Review legal implications 1	User form	Autometion User Form Activity
Verify primary address i	Notify customer 1	Product owner review for ot	© Add activity	Ingers Table 4
Netify customer 1	After Previous After Previous	Verify check entitiement		Retord 4 Select Record Form New
After Previous		meetanty meetanty Billing review for any refunds 1		Nom milds
		2 intradiusy		Completion Condition Add Candition Outputs
		Notify customer 1		Outputs are configurable in Row Designer and are set by the Automation plan.
		Get case report required fro		Experience Status Record Reference Attachment Source String

10. Click on the data pill icon beside Record. Then click on the arrow beside Trigger Complaint Case. Select Complaint Case Record

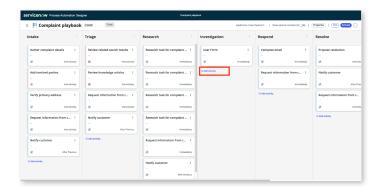


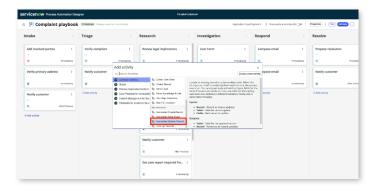
This allows the process dynamically pull data from the current complaint record that the user is on

11. Type padinvestigation to the Form View field. Click Save

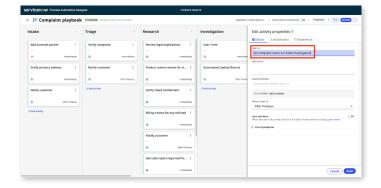


Making this change allows the user to see the investigation required field at the right step of the overall process. **padinvestigation** is a form view that we have in this instance. The form view may be named differently. 12. Now we will update the complaint status to **Under Investigation** when the user sets the **Investigation Needed** checkbox to True Click on **Add activity** under **Investigation** Lane. Then select **Automated Update Record**





13. Type Set complaint status to Under Investigation to the Label field



14. Click on Automation and click on the data pill icon beside the Record field

					Q Seet
Complaint playbook take take totake take take totake	EBB888 Charge sole but not unbased Triage	Research · · · · · · · · · · · · · · · · · · ·	Applicates	Cele Popole II. See estimated to the coll of Edit activity properties Coll activity properties Accession Update Record	4 - Verify complaint G 5 - Notify customer G 6 - Review legal implication 7 - Product owner review0 8 - Verify check entitlement0
- Inneciunty Notify customer 1 - B After Provides Act activity	an Attachedian O Ann antig	Verify check entitlement I	 Atarihane O Mel etinity	Select Nacons Table # Relate CASE Face Corpus Caspus	er et be fek Astension sin.
		Investanty Investanty Notify customer I Anar-Invesse Get case report required fro I		Lakel Lable_name Record	Type Table Name Document ID
		inveduately			Cancel

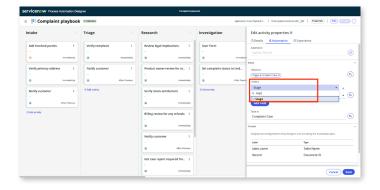
15. Click on the little arrow as shown on the screenshot

					0, Bearch
🗧 💾 Complaint playbook	CPublished Changes saved but not activated		Application	Case Playbook f	Trigger - companie case - o
Intake	Triage	Research	Investigation	Edit activity properties R	1 - Add involved parties 3 2 - Verify primary address 3 - Notify customer 6
Add involved parties I	Verify complaint ! © Immediately	Review legal implications 1 0 investigated	User Form 2 Investage	Automation Update Record	4 - Verify complaint 0 5 - Notify customer 0 6 - Review legal implicati 0
Verify primary address	Notify customer 1	Product owner review for ot 1	Automated Update Record	Inputs Record & Select Record	7 - Product owner review G 8 - Verify check entitlement G
B Investicity	Aher Prevaus	Q investigation	Alar here Alar here		
Notify customer i D After Previous	6 Add activity	Verify check entitlement i D invedually	io nao activity	Redok Add Flord	
S Add activity		Billing review for any refunds 1		Outputs Outputs are configurable in How Designer and	Lare set by the Automation plan.
		D investizably		Label	Туре
		Notify customer I		table_name Record	Table Name Document ID
		Ahar Previous Get case report required from 1		🥖 Vew all properties	
		······································			(Cancel) Save

16. Select Complaint Case Record

					omplaint Case -#
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Add involved parties	Verify complaint I	Review legal implications 1	User Form	3 - Notify customer 0	
	Terry company, 1		user Form	A 4 - Verify complaint D	
* immediately	D investately	D Inmediately	D innedate	5 - Notify customer 0	
		-		6 - Review legal implicati 0	
Verify primary address I	Notify customer i	Product owner review for ot I	Automated Update Record	7 - Product owner review0	<u> </u>
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				Outputs are configurable in flow Designer of	end are set by the Automation plan.
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				table_name	Table Name
		Notify customer 1		Record	Document ID
		E Ater Previous			
				🥖 View all properties	
		Get case report required fro !			
		B Inmediately			Cancel

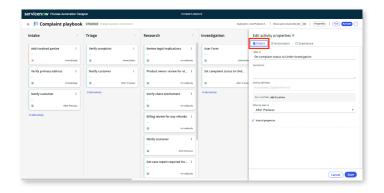
17. Click on the Fields and search for Stage and select Stage



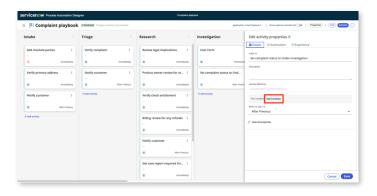
18. Select Under Investigation on the box that appears under Stage

Complaint playbook	D Published		Applicato	CoseRaptorit. Storegonalactivities (2) (IIII (Popertie)	(tet) (rate
Intake	Triage	Research	Investigation	Edit activity properties ®	
Add involved parties I Investigated	Verify complaint 1 Dimensional immediately	Review legal implications 1 Q: immediately	User Form 	Automation Update Record	
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Notify customer I @ And Proton	⊕ Add authriny	Verify check entitlement I In immediately Billing review for any refunds I In immediately	⊙Add activity	Stage - None - None - Istake Trige Research Under Investigation	• ×
		Notify customer 1 Atter Previous		Respond Resolve Close table, name Record Document ID	
		Get case report required fro 1 Immediately			Cancel

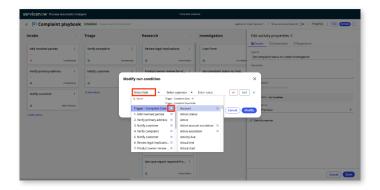
19. Now we will add a Run Condition to this step so that it only updates the complaint status if the Required Investigation is checked. Click on Details tab.



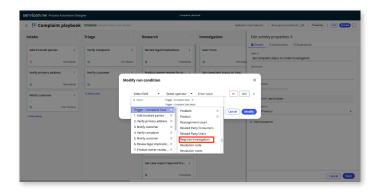
20. Click on Add Condition



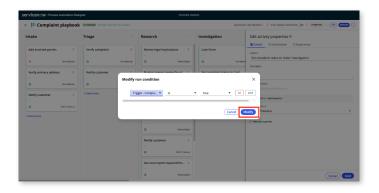
21. Click on the first field and click on the little arrow beside the Complaint Case



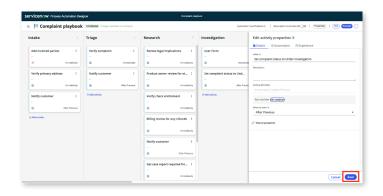
22. Scroll down on the fields section and then select Requires Investigation



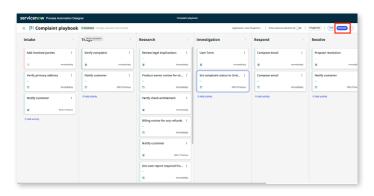
23. The system will auto populate the rest of the fields as shown below. Leave those as is and click on Modify



24. Click Save.



25. Finally click on Activate. This will activate the new process. It'll be applied to new complaints created going forward.



Great job! You updated the process so that the agents can now flag records for investigation and loop in the Legal Support team. Now let's see this on action! To see the new complaint process, we will create a new complaint record.

Test the Complaints Playbook

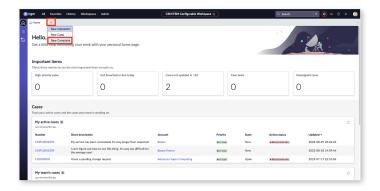
1. On your browser, click on the tab that says Home|ServiceNow

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📳 Complaint playbook	© Addited		Application: Case	Physicology Show optional activities (0) (200	(Poperties) Test (const)
ntake	Triage	Research	Investigation	Respond	Resolve
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2. Click on Workspaces and select CSM/FSM Configurable Workspace

ow you've got a str round and do your l	Service Operations Workspace Asset Workspace <u>CSNUFSM Configurable Workspace</u> CMDB Workspace Plattorn Analytics Workspace	nu features tha	it make it easier to	navigate	• • • • • • • •		
lanage your insta	nce						
Apps ready to update			Apps ready to install		Instance Security Co	inter notifications	
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eview your work							
Assignments 🖩					σ	Critical Tasks	New tasks
Last refeated 4m ago.	Created	State -	Priority -	Short description		0	2
C50009003	2018-10-11 19:11:34	Open	4 - Low	I have a pending change request			
CMPL0001009	2023-08-18 14:59:46	New	4 - Law	I can't figure out how to use this thing. It's way user!	too difficult for the average	Open tasks by priorit	y .
CMPL0001005	2023-08-18 14:58:07	New	4 - Law	My service has been unavailable for way longer	than expected.		

3. Click on + icon and then select New Complaint



This is one of the ways your agents can create new records when they need to intake an issue.

4. You'll see this screen:

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Subsection Gather complaint details Question to the subsection of th	
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A Resolve Consists data Determine State	
Close Contraction	

5. Fill in the details:

Field Label	Value
Account	Boxeo
Contact	Julie Lewis
Complaint Type	Product
Product	ACME Corporation ACME DM
Short Description	Product Complaint

Click Continue

List Create New Cors × Details	CMPLODO	005 × +		
Create New Compla	int Cas	ie ©		5
Complaint playbook V	•	Accent Boxeo © Q Complete type x Product •	Product &	Related Search Results
Gather complaint details Add involved parties Verify primary address Notify customer	•	Sold Product Q Cotegory -None Short description		 A Constantic Clear and Charger Andrew Constantiation of Charger Constantiatio of Charger Constantiation of Ch
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Resolve 2 remaining Close 2 remaining	• •	Complaint details		Substrations And Section 10 Bellow And Section 10 Bellow Advances
-				

6. Click on Assign to me

Product Complair					Close Case Save Ass	ign to me
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Research	~		No records to display.			
A Investigation	~			And party in our Add row		
A Respond	~					
A Resolve						

7. Click on Verify primary address and then click on Move to triage

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Product Complain		asics Attached Knowledge Interaction	n Knowledge Gaps Requests Related Cases Emails (1)	Close Case Save
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8. Once the screen is refreshed, click on Submit for review

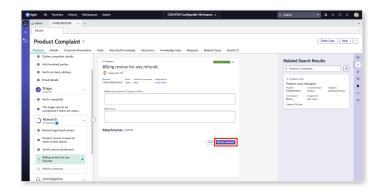
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Respon transition Resolve Zonatolog		• •								

9. Once the screen is refreshed, you'll be in the Research stage of the process. Click on **Review Complete** on the next 4 tasks as shown below:

Dingm All Favorites History Workspaces	Admin CSM//ISM Configurable Workspace 🏫	Q. Search 🔹 🛭 🔍 📿 🧕
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Gather complaint details Add involved parties Verify primary address		Propus Product owner review for other similar issues	ana tarwada d	Related Search Results
Email details Triage Complete Verify complaint The stage cannot be	^ _	umaru Sola Valibin ta catarar Audopad ta MPRIABED33056 Open tala Additinad communit (Contaner vhilhe)		, * Conglaiz Caso : 1 Product care damaged Manaker Consider from Caregory CARX0000005 Product Defuctive Product Schongery Anigrad to Belen Johnson Updmit/264 pp
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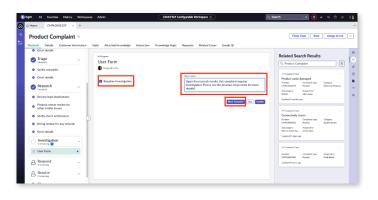


10. Once the screen is refreshed, you'll be in the Investigation stage of the process. This is the stage that you just created following the lab. On the form do the following:

Field Name	Value
Requires Investigation	checked
Work Notes	Upon the research results, this complaint requires investigation. Please see the previous steps notes for

Field Name	Value
	more details.

Click on Mark Complete



11. Now let's check the new stage of the case and verify that the case stage is automatically updated to **Under Investigation** because of the previous step. Click on **Details** tab. Observe that the Stage is automatically updated to Under Investigation

CMPL0001059 0							Close Case Sa
Taybook Details Customer Informat	ion Tasks (d	Attached Knowledge Interactio	n Knowledge Gaps	Requests Related Cases Emails (4)			
Complaint Case			~ 1	Compose	4	Related Search	Results
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4-Door French Door Refrigerator	0 0	Andy Brady	0 0	Andy Brady Werknesses • 2023-11-07 02:17:19			
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				Andy Brady		Updated 2 months ago	
Notes				Andy Brady Wedness + 2022-11-07/01 12:34			

Congratulations! You just experienced the investigation stage that you added to the out of the box complaint management process. Let's stop here.

Our next section of the lab will focus on creating the **Investigation App** that the Legal Support team will use to execute the investigation.

Create Investigation App with App

Engine

Overview

In this exercise, we'll see how IT and the business can partner to create applications to better support our customers.

Personas

Citizen Developer [sit-uh-zuhn dih-vel-uh-per]

Someone who, despite lacking formal coding training, engages in creating software applications and tools to solve specific business problems or enhance workflows. A citizen developer leverages low-code and no-code platforms to translate their domain knowledge into practical solutions.

In ServiceNow, this could be any user developing in Dev without the 'admin' role.

Devon Samrah	Business Process Owner & Citizen Developer
	Devon Samrah is a long time member of the Legal team and leads the Complaint Investigation team. Given her vast knowledge of the overall process, she is the perfect candidate to build a low-code app that supports the complaints investigation process.

Andy Brady	System Administrator
	As a ServiceNow System Administrator, Andy's primary responsibilities involve managing and maintaining the ServiceNow platform within an organization.

Create Request for Citizen

Development

Governance plays a key role in the success of any citizen development program. Our use case is no exception. Before Devon can build her application, she needs to request the access from the IT team. She will create a new request on the Employee Center portal and Andy, our platform administrator will review and provide his approval.

NOTE: In a real world environment, notifications in the form or email, text, platform notifications would take place. In our lab environment we will simply rely on the switching of users to see and approve the requests.

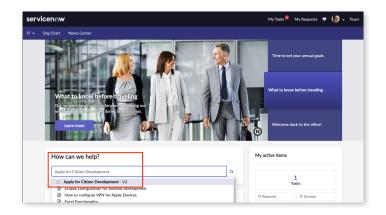
 To get started, navigate to the Employee Center portal and impersonate our Citizen Developer, Devon Samrah. You can find the link to Employee Center on the landing page of your instance, but for quick reference -

https://INSTANCENAME.lab.service-now.com/esc

(i) NOTE

Replace INSTANCENAME with your personal lab instance

2. Type Apply for Citizen Development in the How can we help? search box and then click on the Apply for Citizen Development - V2 option that appears.



3. Complete the form with the following fields:

Application Name:

Complaints Investigation

Describe your idea in a few sentences:

Right now, complaint cases are being logged in ServiceNow. We want to move our process from spreadsheets to ServiceNow to better serve our customers with a more consistent experience.

Does this involve any sensitive/PII data?



Who are the users that will have access to the data in the application?

All of the Complaints Investigation department including management.

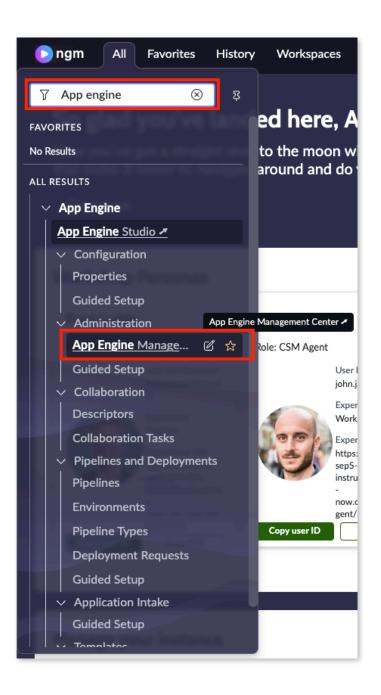
This is the first step to empower application.	you to develop and drive the development of your	
Fill in the below form with specifi Engine Studio, and create the bus	ic details that would drive you to develop apps on App siness value you need.	
*Application Name		
Complaints Investigation		
Describe your idea in a few sente	ences	
	being logged in ServiceNow. We want to move our proce ow to better serve our customers with a more consistent	
ls your process repeatable?		
Yes		*
Do you have an email or excel-ba	ised process?	
Yes		*
How many users are involved in t >20	this?	
<=20		
Does this involve any sensitive/P	'll data?	_
No		v
Do you need data from other dep	partments?	
Yes		v
Who are the users that will have	access to the data in this application?	
All of the Complaints Investigation	ion department.	

Once your form is complete, click Submit

4. With our request submitted, we can now switch back to our platform admin persona, Andy, to approve Devon's request. Click on Devon's profile picture in the top right then click End Impersonation.

servicenow	Search	۹	My Tasks 🧯	My Requests 👻 🔞 🗸 Tou
IT + Org Chart News Center				Profile
Home > Request Summary				End Impersonation
				Impersonate
Submitted : 2023-09-11 14:43:06 Request Number : REQ0010001				Logout
Estimated Delivery :				
Item Delivery Date	Stage	Price (each)	Quantity	Total
Apply for Citizen Development - V2				
				Total: \$0.00

5. Now back on our platform landing page, click on All and search for App Engine in the filter nav. Choose App Engine Mangement Center from the options. AEMC loads in a new browser tab.



6. Here, Andy can see any new requests for applications, collaborations or application deployments. We see there is one new pending request to complete. Click on the 1 just above the word Intake.

ngm All Favorites History Workspare <u>Overview</u> Requests Pipelines Custom apps	ces : App Engine Management Center ☆ Q s Developers	iearch 🔹 🔿 🔿 🤤
Welcome to App Engine N Manage and monitor the entire lifecycle of custom a	Nanagement Center, Andy!	
Pending requests to complete	New requests over time	Auto-approved collaboration requests
Total pending requests	1	Updated 1 minutes ago Closed-failed deployment requests O
1 O O Intake Collaboration Deployment	Sep 11 Instance Cotheorem Deployment 	in the last 72 hours Updated 1 minutes ago
Active deployment requests in pip Select each environment in the deployment pipeline		C

7. We see there our request from Devon. Click on the number beginnigg with RITM to view it

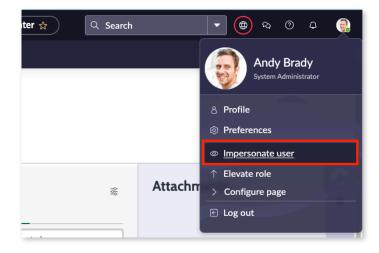
Intake (1) Colla	aboration (0) Deployment (0)			
				01
Intake 1				01
Last refreshed just now.				
Number	App name	Email	State 7	Created

NOTEYour RITM number may vary from what is in the screenshot

 Next, we will specify the development environment and what access Devon will have as she is building her application.
 Scroll to the bottom of the request and choose Development from Development Instance and Create/edit applications (AES User Group) from the Permission type field.

Development instance		
Development		•
Create/edit appli	cations (AES User Group)	•
Create/edit appli	cations (AES User Group)	-
eate/edit appli	cations (AES User Group)	•

9. Once complete, save the reqest record. Since we are operating in a lab environment and this is NOT a governance workshop, we've reconfigured Devon to have the access she needs without requiring a complete pipeline configuration. We can now move on to impersonating Devon again and build our Complaints Investigation app. Click on Andy's profile picture in the top right and click Impersonate User. Choose Devon Samrah from the list.



Impersonate user	×
Select a user	
Devon S	Q
RECENT IMPERSONATIONS	
Devon Samrah devon.samrah	
John Jason john.jason	
Julie Lewis	U
	Cancel Impersonate user

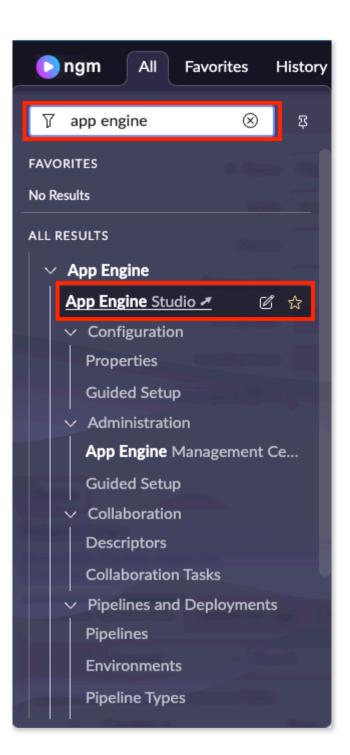
Click Impersonate User to complete the switch to Devon's persona.

Nice work! You've just set things up for Devon to be able to create her app. Now let's move on to the next exercise, creating the complaints investigation app.

Create Application in App Engine

Studio

1. Type app engine studio in the Filter Navigator and then click on the App Engine Studio link. App Engine Studio will open in a new browser tab



2. Once App Engine Studio opens click the **Create app** button in the upper right of the screen.

NOTE: if you get a Getting Started message, you can close it.



3. Enter the following for each field:

Name

Complaints Investigation

Description

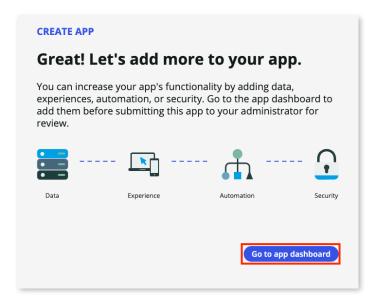
This app is designed to streamline customer complaint investigations

CREATE APP	
Let's get started on your new a	pp.
Add a name and description that define the purpose You can also add a thumbnail image.	of your app.
Name * O	
Complaints Investigation	L Drag app logo
Description ③	or browse to
This app is designed to streamline customer complaint inve	upload
	BMP, GIF, ICO, JPEG, JPG, PNG, SVG
Cano	Continue

4. App Engine Studio will create default roles for admin and user of our application. Users assigned these roles will be members of the team responsible for investigating the complaints. Accept the default admin and user roles and select Continue.

Default roles have alr apps. You can add or	eady been added based on popula remove roles, later.	r roles for
	 Add a role 	
Role name * 🛈 admin	Description O Default admin role	0
Role name * ① USET	Description © Default user role	Ū

5. Select the Go to app dashboard option once the app is created.



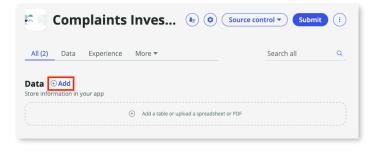
Nice work.. you've just created the foundation of our Complaint Investigation app. Now let's move on to the next exercise, creating our data model.

Create Application Data Model

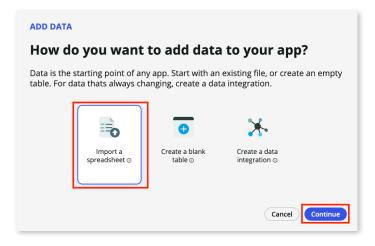
In this exercise will start building out the tables needed to support out application. We'll import a spreadsheet to quickly populate the table with existing data. This is a very common way customers are building tables in App Engine Studio for processes that are currently being administered in Excel and email.

Data can also be imported from other third-party sources like a database or web service/API.

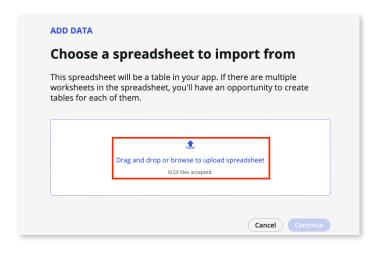
1. On the app homepage, click on +Add next to Data.



2. Select Import a spreadsheet and then the Continue on the next screen



3. Click Drag and drop or browse to upload spreadsheet. Download this file: ComplaintsInvestigationImport.xlsx and upload the file to the instance.



4. Check the Import spreadsheet data checkbox and click Continue

÷	③ — ③ Source Define Summary	×
	ADD DATA	
	Here's what you chose.	
	In the next step, you can choose where to import your spreadsheet into: either an existing table or a new table.	
	Complaints investigation Import.stsx	
	Enter a row number for the table header * 0 1 Import spreadsheet data 0	
	Cancel	

5. On the next screen, keep the default option of A new table and choose Create from an extensible table then click Continue

ADD DATA		
Where do	ou want to import your file	into?
Create a new tabl about tables.	e from file or Import your file into an existing tabl	le. Learn more
Import your file into		
 A new table An existing table 		
CHOOSE HOW TO CRI	ATE YOUR NEW TABLE STRUCTURE	
•	•	
Create new table ⊙	Create from an extensible table ⊙	
		Cancel

6. Search in the Table field for Customer and choose Task from the list. Click Continue

ADD DATA	
Which table do you want to use?	
We'll add the table's data to your app. Essentially, you are creating an exter with branching logic.	nsion
Table	
Customer	
Recommended tables	
Case Stores <mark>customer</mark> service case records.	
All other tables	
Card Configuration sn. <mark>customer</mark> central_card_config	
Task sn_customerservice_task	

7. Set the Table label field to Complaint Investigation Select Auto number Set the Prefix field to CMPLINV

Define the properties	of your new table.				
Table label * ③ Complaint Investigation					
. 0					
Table name prefix 🛪	Table name 🛪 🛈				
x_snc_complaints_0_	complair	nt_investigation			
🗌 Make extensible					
🗹 Auto number 😳					
Prefix * ①	Starting number * ①	Number of digits * ①			
rielix 🛧 🔍	starting number ★ ①	number of utglts * 0			

() INFO

Setting the Prefix allows us to distinguish our tasks from records created that are also extended from the Customer Service Task table.

8. The next step is to setup permission for the Complaint Investigation table. Assign full permissions to the admin role by selecting All. Select the Create, Read and Write permissions for the user role. When finished, click Continue.

-	how much control each role has o		Note: at	loact o	no rolo i	aaada t
	u to 'preview' the data in your tal		Note. at	least 0	nerolei	leeus t
	Add a role					
Role Name 🛛	Description ©	All	Create	Read	Write	Delete
admin	Default admin role					
user	Default user role					

9. Now, we wait for the platform to create our table. Select **Continue** once the table is created to move on to mapping our imported data to the appropriate fields.

Great! N	ow your table	e is ready	for data	
	o, we will match fields f d table. You'll have an o ir import in it.			
			<u>®</u>	
			_	

10. Once the screen loads, you can exit out of any guided tour popup that may appear initially. Looking at the right hand column, you'll notice the platform automatically mapped our fields for us! This is indicated by the wand icon next to the column name

	Assigned to		Reference	۵	Assigned To 😥 X	
--	-------------	--	-----------	---	-----------------	--

 Scroll through the list to ensure all your fields are accounted for. You'll notice that Group is not associated with the Assignment Group field on our table. Drag and drop it from the left side to the right next to the Assignment Group field.

Now, map the imported	fields						
Now, map the imported	lielus						
When you map a field, you reuse the prop	erties of an exis	ting table. Map as mai	ny field	s as possible	e to av	oid duplicating fields.	
						/ Auto ma	ap 💿 Add field
ource: Complaints Investigation Import.xlsx		Target: Complaint Inve	estigatio	n [x_snc_comp	laints_0	_complaint_investigation]	
Name	Туре	Name	match	Туре		Value	
V Excel Header	Object	Account	-	Reference	0		(1)
(Assigned To (Priority)	string	Action status	0	Integer			ĸ
Group	string	Active	0	True/False			(K)
Complaint Case	string	Activity due	0	Due Date			
Short Description	string	Actual end	0	Date/Time			_ 🖪
(State) Contact	string	Actual start	0	Date/Time			K
Contact	string	Additional assignee list	0	List			K
		Additional comments	0	Journal Input			K
		Approval	0	String			K
		Approval history	-	Journal			
		Approval set		Date/Time			K
		Assigned to	0	Reference	8	Assigned To (R) X	_ <u>(</u> K)
		Assignment group	0	Reference	8	Group (k) X	(R)

12. We also need to associate these existing complaint investigations with the cases they are related to. Scroll down until you see the Parent field on the right. Click the magic wand icon on the right of the field then the small arrow next to Source and choose the Complaint Case option from the menu.

Number Opened			omplaints Investigation Import.xlsx> → omplaints Investigation Import.xlsx>	
Opened by	Source : <complaints inves<="" td=""><td>0</td><td>Assigned To</td><td></td></complaints>	0	Assigned To	
			Priority	
Order		3	Group	1.
Parent			Complaint Case	
Parent case			Short Description Complaint	Case
Priority			State	
Reassignment			Contact	
Service) (R

INFO This is referred to as 'dot-walking'.

13. Click Continue

Additional comments		Journal Input		
Approval		String		
Approval history		Journal		
Approval set		Date/Time		
Assigned to	\bigcirc	Reference	ø	Assigned To (x) X
Assignment group		Reference	¢	Group (k) ×
Associated Record	\bigcirc	Document ID		
Associated Table		Table Name		
				Cancel Continue

14. Click Done once the table has been created to return to the App Home.

EATE TABLE			
our table is rea	dy		
u can continue to edit thi	s table or get back to building the rest of	your app.	
Source	Table name	Fields	
Spreadsheet	Complaint Investigation	0	
data import details 🕜			
			Edit table Don

15. Let's check our table to make sure the data is mapped correctly. You should see our newly created Complaints Investigation table listed under Data. Click on the Preview link



16. Your screen should look similar to the one below

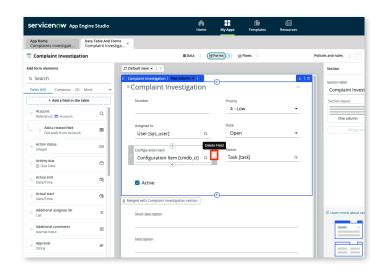
= ⊽	 Complaint Investiga 	Tor text	* Searc	n		۲	å Actions o	in selected row	is Y New
] Q	Description	Subject	Contact	Contract	Assignment group	Assigned to	Priority	State	Parent
	Search	Search	Search	Search	Search	Search	Search	Search	Search
	Damaged Item Received	Damaged Item Received	Jane Contact	Jane Contact	Complaints Investigations	David Miller	3 - Moderate	Closed	CMPL000101
	Slow Online Services	Slow Online Services	Harding Asher	Harding Asher	Complaints Investigations	Lisa Ray	3 - Moderate	Work In Progress	CMPL000100
	Defective Product	Defective Product	Craig Parker	Craig Parker	Complaints Investigations	Emily Jason	2- High	Work In Progress	CMPL000100
	Service Outage	Service Outage	Ingrid Blake	Ingrid Blake	Complaints Investigations	Lisa Ray	2- High	Awaiting Info	CMPL000100
	Delayed Shipment	Delayed Shipment	Amy Pascal	Amy Pascal	Complaints Investigations	Devon Samrah	3 - Moderate	Work In Progress	CMPL000100
	Incorrect Refund	Incorrect Refund	Tommy Gore	Tommy Gore	Complaints Investigations	Mark Johnson	2- High	Closed	CMPL000101

Once you've finished reviewing the data, close the window to return to App Engine Studio

17. Next, let's focus on the data we want to be shown on the screens when viewing these investigation records. In App Engine Studio, click on the table and click on Forms at the top of the screen to open Form Builder

	ge columns 78 🛛 🖓 Filt	er					
escripti		E Contact	E Contract	B Assignm	E Assigned	123 Priority	
aged Item	Damaged Item	Jane Contact	Jane Contact	Complaints Inv	David Miller	3 - Moderate	0
Online Se	Slow Online Se	Harding Asher	Harding Asher	Complaints Inv	Lisa Ray	3 - Moderate	١
ctive Prod	Defective Prod	Craig Parker	Craig Parker	Complaints Inv	Emily Jason	2- High	١
ce Outage	Service Outage	Ingrid Blake	Ingrid Blake	Complaints Inv	Lisa Ray	2- High	,
ed Shipm	Delayed Shipm	Amy Pascal	Amy Pascal	Complaints Inv	Devon Samrah	3 - Moderate	١
rect Refund	Incorrect Refund	Tommy Gore	Tommy Gore	Complaints Inv	Mark Johnson	2- High	0
uct came	Investigation r	Julie Lewis		Complaints Inv		4 - Low	
	aged Item Online Se ctive Prod ce Outage yed Shipm rrect Refund uut came	Online Se Slow Online Se Online Yerod Defective Prod ce Outage Service Outage yed Shipm Delayed Shipm rect Refund Incorrect Refund	Online Se Harding Asher Online Se Harding Asher Ottoma Defective Prod Craig Parker CeoUtage Service Outage Ingrid Blake red Shipm Delayed Shipm Amy Pascal resct Refund Incorrect Refund Tommy Gore	Online Seu. Slow Online Seu. Harding Asher Harding Asher other Seu. Slow Online Seu. Craig Parker Craig Parker ctwe Prod Defective Prod. Craig Parker Craig Parker ce Outage Service Outage Ingrid Blake Ingrid Blake yed Shipm Delayed Shipm Amy Pascal Amy Pascal reet Refund Incorrect Refund Tommy Gore Tommy Gore	Online Seu Slow Online Seu Harding Asher Harding Asher Complaints Inv cttve Prod. Defective Prod. Craig Parker Craig Parker Complaints Inv ce Outage Service Outage Ingrid Blake Ingrid Blake Complaints Inv red Shipm Delayed Shipm Amy Pascal Amy Pascal Complaints Inv reet Refund Incorrect Refund Tommy Gore Tommy Gore Complaints Inv	Online Seu Slow Online Seu Harding Asher Harding Asher Complaints Inv Lisa Ray ctive Prod Defective Prod Craig Parker Craig Parker Complaints Inv EmilyJason ce Outage Service Outage Ingrid Blake Ingrid Blake Complaints Inv Lisa Ray ed Shipm Delayed Shipm Amy Pascal Amy Pascal Complaints Inv Devon Samrah reet Refund Incorrect Refund Tormmy Gore Tormmy Gore Complaints Inv Mark Johnson	Online Se Harding Asher Harding Asher Complaints Inv Lisa Ray 3 - Moderate Othine Se Defective Prod Craig Parker Craig Parker Complaints Inv Emily Jason 2 - High ce Outage Service Outage Ingrid Blake Ingrid Blake Complaints Inv Lisa Ray 2 - High ed Service Outage Ingrid Blake Ingrid Blake Complaints Inv Lisa Ray 2 - High ed Service Outage Ingrid Blake Amy Pascal Complaints Inv Beoron Samrah 3 - Moderate resct Refund Incorrect Refund Tommy Gore Tommy Gore Complaints Inv Mark Johnson 2 - High

18. To make this form more useful for us, remove the **Configuration Item** field by hovering over the field and clicking on the X that appears



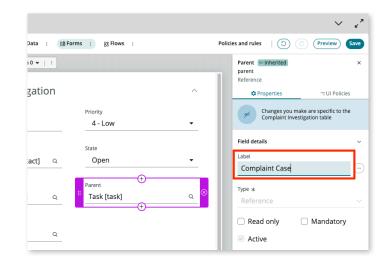
19. Now we'll add some fields that help us with our investigation process. On the Add form elements side bar, search for the Assignment Group field and drag/ drop it on the form. Repeat the process for Contact and save your form once complete. Your form should look similar to below

servicenow App Engine Studio		n 🔢	templates	Resources	۰	(
App Home Data Table And Fo Complaints Investigati	rms ×					~ .
Complaint Investigation	🖬 Data 💠	B Forms : 83	Flows :		Policies and rules ③ ③ (Preview	0
dd form elements Q. Contact × Relds (2) Components More •	Default view - : Complaint investigation = Complaint Investigation	on		^	Contact Withinstad contact Reference © Properties TUI P	olicies
+ Add a field in the table	Number	Priority 4 - Lo	w	•	Changes you make are specific Complaint investigation table	to the
Reference: III Contact	Contact [customer_contact]	o, State		•	Field details Label Contact	
:: Contact type String	Assignment group Group [sys_user_group]	Q Task [t	ask]	٩	Type * Reference	
	Assigned to User [sys_user]	Q			Read only Mandat Active	ory
	Active				Reference	
	Merged with Complaint Investigation section				Default value Dependent field	
	Short description				Attributes (3)	
	Description				Formula	
	Work notes				More properties available	

20. Let's also rename the Parent field so it is more meaningful for our process. Click on the Parent field and change the Label field in the right configuration section to say Complaint Case and click Save

() INFO

This label change will only be reflected in our Complaint Investigation table and will not impact the rest of the platform.



Excellent! Now that we have our legacy data in the plaform, let's look to see how we create our own Workspace to start managing these investigations using ServiceNow!

Create Investigations Workspace

We've got our data, now we need to work on the experience for our investigations team. Similar to John Jason in the earlier lab, we'll configure our workspace to ensure we don't miss important investigations and provide our customers with the best customer experience.

1. On the app homepage, click on +Add next to Experience.

	See all (2)
Last edited 2023-09-11 16:5	
Last edited 2023-09-11 16:5	

2. Select Workspace from the next screen and then Begin

ADD EXPERIENCE

What type of experience do you want to add to your app?

Select an experience to learn more about the interface and what it can do for your users.

	Constant and a second and
A workspace helps users manage and fulfill requests sent to them.	Standard catalog item People can add ways to request a good or service.
Personal Academic Sciences	
Record producer People can create records using a catalog item.	Portal Deliver apps to your employees or customers using a modern, easy to use portal

ADD EXPERIENCE

A workspace helps users manage and fulfill requests sent to them.

Details Upgrade to new router not successful with the state of the second sec	Dose Case Save Create Work Or	ier Propose :	Solution Request Info
Contact Contac	Timeline	New 0, 0, 0,	Case - Priority 2 resolutio Id 23h 56m Remaining
Details Customer Information Customer Address • Case Institute Image: Cost of the cost o	BLAS (1) Tasks more + Compose # Compose # Comments + Top your Comments here Generates the Post Comments E 80	Q. Upgri D Anice Router	d Search Re

3. Leave everything as default on the next screen

ADD EXPERIENCE
Let's design your Workspace
This experience needs a name, description and URL.
Name * © Complaints Investigation
Description © Enter a description
urL ★ ⊙ complaints-investigation
/now/complaints-investigation
Roles () (x_snc_complaints_0.admin ×) (x_snc_complaints_0.user ×)
Cancel

4. Ensure Complaint Investigation is listed as the Primary table. For Secondary tables, choose Complaint Case so we can see those on our workspace as well

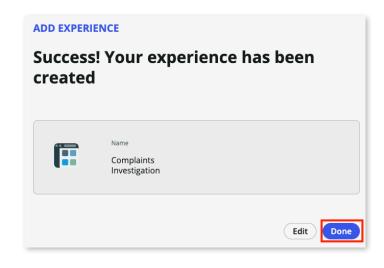
ADD EXPERIENCE

Great. Let's add some data.

Select the data tables you want to work on in this experience.

Complaint Investigation	
Secondary tables Complaint C Complaint Case Sn_complaint_case	

5. Once the Workspace has been completed, click Done

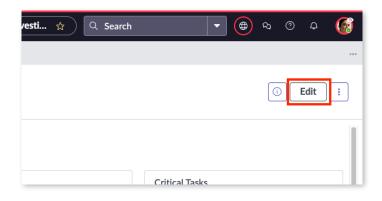


6. Back on our App Home page, click on **Preview** next to our new Complaints Investigation Workspace.

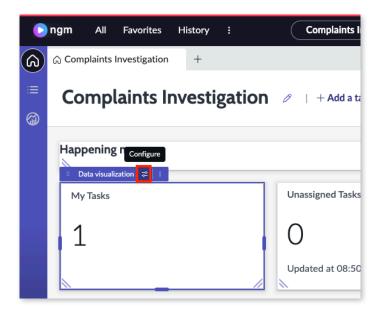
7. Since we uploaded our existing spreadsheet, you should see some existing records in our workspace. Your workspace should look similar to this one:

	History :	Complaints Investi 😭	Q Search	▼ ⊕ Q 0	φ (
© Home +	vestigation -			⊙ E	dit :
Happening now					
My Tasks	Unas	signed Tasks		Critical Tasks	
1	0			0	
	Upda	ited at 08:47 AM		Updated at 08:47 AM	
My Work I					o
Description	Subject	Contact	Contract	Assignment group	
Delayed Shipment	Delayed Shipment	Amy Pascal	Amy Pascal	Complaints Investigations	

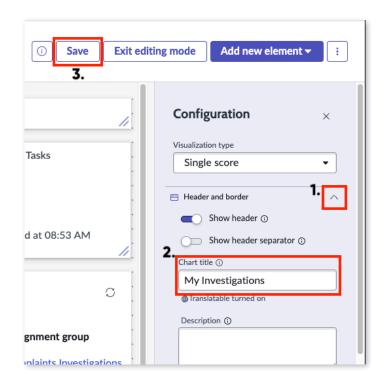
8. Let's use Workspace Builder to configure this workspace to our needs. Click Edit at the top of the screen



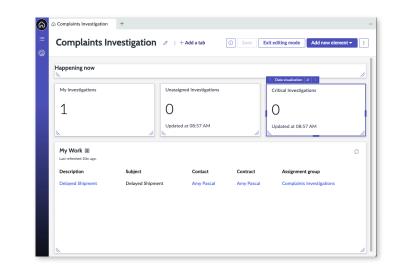
9. Click the My Tasks component then click the Configure button



 On the Configuration pane that appears, find the Header and border section and click the down arrow to expand it. Change the Chart title to My Investigations then click Save

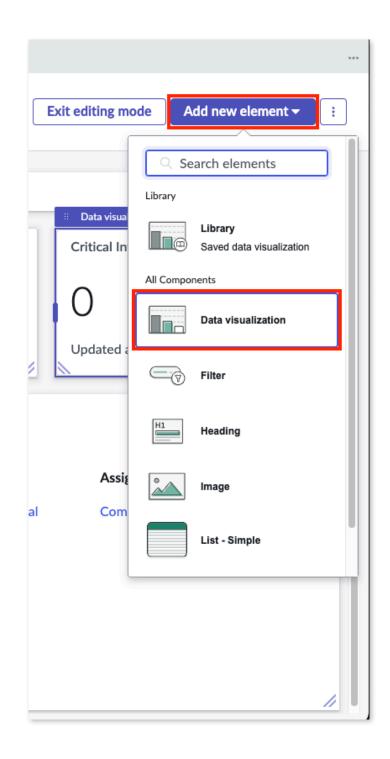


11. Repeat step 10 for the remaining widgets replacing the word Tasks with Investigations. Your workspace should look like similar to the below workspace when complete.



DANGER Before we move on SAVE YOUR WORK!

12. Next, let's add a new Data Visualization widget to our workspace so we have some visability into the overall landscape of Complaints Investigations. Click on Add new element at the top and choose Data visualization



13. The new component will be added to the bottom of the workspace by

default. Drag it up just above **My Work** and resize it to match the **My Work** list below.

	ngm All Favorites	History i	Complain	ts Investigation	Application sco	pe: Complaints	Investigations 🖨 ର 🔿 🗘	6
ଭ		+						
	Complaints I	Exit editin	ng mode Add new element v	i				
	Happening now						Configuration Visualization type	×
	My Investigations	Unass	gned Tasks		Critical Investigations		Single score	•
	- L	Updat	ed at 12:59 PM		Updated at 12:59 PM		 Data Data sources 	^
	Data visualization ≠		content availab				Define data manuality @ Data null To start configuring your chart, yo need to connect to a data source • Add data source	
	My Work I					0	Metric To configure the metrics, you nees to add a data source first.	d
	Description Delayed Shipment	Subject Delayed Shipment	Contact Amy Pascal	Contract Amy Pascal	Assignment group Complaints Investigations		Date range Additional settings	~
							Data update No data message	~
							Presentation Display settings Colors	~

14. Now let's configure the new widget. On the configuration pane, choose Vertical Bar from the Visualization type list.

Configuration	×	
Visualization type		
Single score	*	
Q Search		_
<u> </u>		-
Bars		•
F Horizontal	bar	
🔤 Vertical ba	r	
Pie and donuts		
🕭 Donut		
🕑 Pie		
🕰 Semi donu	t	
Multidimensional cha	nrts	

15. Find and expand the Header and border section. For the Chart Title enter:



Configuration ×
Visualization type
Vertical bar 🔹
Header and border
Show header 🛈
Om Show header separator ()
Chart title 🗊
Complaint Cases by Account
⊕ Translatable turned on
Description 🛈
O Wrap title ①
Show border 🛈

1. Under the Data section, click Add data source

Configuration	×
Visualization type	
Vertical bar	•
Header and border	~
🗐 Data	^
Data sources	^
OD Define data manually 🛈	
To start configuring your chart, you need to connect to a data source.	
+ Add data source	
Metric	^

17. On the Add data source page, search for Complaint Case and click on the option when it appears.

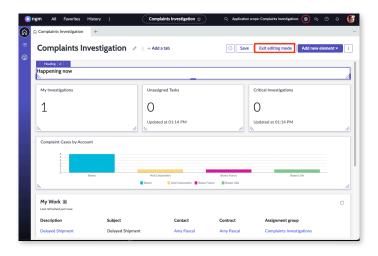
Add data source
Select a source ①
Q Complaint Case
$\vee \equiv$ Tables
Complaint Case [sn_complaint_case]

18. Under Predefined conditions choose ComplaintCases.Open and click Run. Ensure that data is displayed then click Add this source

				🖋 Edit
Predefined conditions		_		
		•		
Q Bearch	Open	-		
Run	.open			
Preview record lis	st 7			
ast refreshed 1m ago.				
Account	Action status	Active V	Active account escalation	Active escalation
Зохео	Blocked internally	true	(empty)	(empty)
Avid Corporation	(empty)	true	(empty)	(empty)
Зохео	(empty)	true	(empty)	(empty)
Зохео	Blocked internally	true	(empty)	(empty)
Boxeo France	(empty)	true	(empty)	(empty)
Boxeo USA	(empty)	true	(empty)	(empty)
Зохео	(empty)	true	(empty)	(empty)
soxeo				

19. Save your work and click Exit editing mode

Before saving, it may be necessary to do some resizing of the compomnents on the screen. Feel free to do so as needed.



20. Your dashboard should look similar to the screenshot below

Complaints Inv	estigation -				() Edit
Happening now					
My Investigations		Unassigned Tasks		Critical Investigations	
1		0		0	
		Updated at 01:16 PM		Updated at 01:15 PM	
6 5 4 2 1 0 8	200	Avid Corporation	Boses France	Bose USA	
		loweo 📒 Avid Corporation 📕 Boweo Franco	e 📕 Baseo USA		
My Work II					¢
Description	Subject	Contact	Contract	Assignment group	
	Delayed Shipment	Amy Pascal	Amy Pascal	Complaints Investigations	

21. Now that we have our homepage complete, let's take a look at the record

pages and ensure we can see the activities that take place on these investigation records. Back on your **App Home** screen, find your workspace under the **Experiences** section, click the ... on the right and click **Edit**

<pre>tperience</pre>		See all (7)
Complaint Investigat Form	Last edited 2023-09-27 16:	
Complaint Case W Form	Last edited 2023-09-27 16:	
Complaints Investig Workspace	Last edited 2023-09-27 16: • PREVIEW	 Edit
gic and automation [•] Add d automated workflows to improve productivity		Delete

22. This takes us to Workspace Builder. Click on Get started if you get a pop-up screen welcoming you. At the top under Record pages click on Complaint Investigation

servicenow App Engi	ine Studio	Home	My Apps	() Templates	Resources	• (
App Home Complaints Investigati	forkspace omplaints Investig ×					× .
🗄 Complaints Investig	Navigation configuration Record pages	nt Case Record P				(Workspace settings) (Preview
G Home		nt investigation				Home settings
= List	C. / + Add + Create	new Exit	editing mode	Add new	element 🕶 📋	This page shows users high-level information for the records they have access to on the workspace
Analytics	Happening now					You can further customize this page using advanced configurations and components.
	Critical Investigations O Updated at 02:51 PM				li	
	Complaint Cases by Account	Avid Corporation	Boose France	Boox geog USA	o UZA	
	My Work 10 Last refreshed just now. Description Subject	Conta	t Contra	ct Assig	Onment group	
	bubleet	contai				

23. Click on Record details in the left panel then toggle Activity Stream in the right panel. You should see a message indicating that we have successfully activated the activity stream

Servicenow App Eng	gine Studio		Home	My Apps	Templates	Resources		• (8
	orkspace implaints investig ×	Activity stream a	ctivated succes	ssfully.			×	× ,
Complaints Investig	Navigation configuration	tecord pages ~						(Workspace settings) (Preview
Complaint Investigation Record Page	Representation of your work	cspace					🕈 Open in UI Builder	Record details This section contains tabs to access record details and information related to the table fr
tings		Complaints In 🏫	r) q	Application s	cope: Complaints Inv	estigations 🌐 1	00	this record. Learn more about record details
cord details 1.	A Home Details	MPLINV0001007 ×	< +					Form details
	Investiga Viority State 4 - Low Open Details	ation requi	ired for (CMPLO	001019	0	Save	Activity Stream 2.
	Complaint Investigati		Compo Type you Work no (Private)	r	Attachme	nts	Ø	No tabs added yet Add tabs to help users access information i tables related to this record type + Add tabs
	CMPLINVO Coetact Julie Lewis Assignment proop Complaints	Complaint Case	Pos Wor note (Priva	k s				Playbook No plugins installed yet All the required plugins are not installed at th momenr, please install the required plugins to playbook.
	Assigned to		Activity	7		hments Available : to add it as an attacher Browse	ent	() Click here for plugin details.

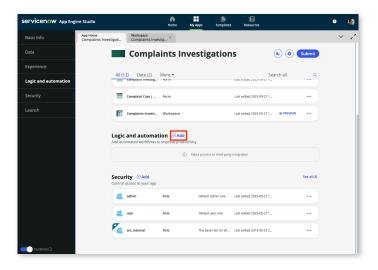
That's it! You've just successfully configured a new dashboard for Complaints Investigations team and added features to the form that will help the team work more efficiently in the complaints investigation process!

Feel free to add additional data visulization and components to get a better feel for the flexibility of the dashboards and workspaces.

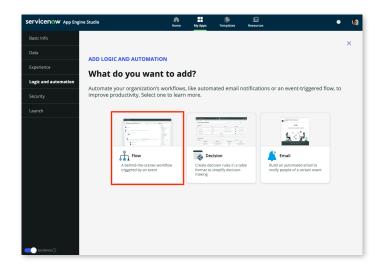
Create Flow in Flow Designer

In this exercise, we'll tie our investigation process together with the Complaints Management module in CSM so we can wave bye-bye to those spreadsheets!

1. If you haven't done so already, close your workspace and go back to your App Engine Studio window. In the Logic and Automation section, click on Add



2. There are several options for automation when building an app as a low code developer on the ServiceNow platform, but today we will be focusing on workflow. So on this screen, choose Flow from the options

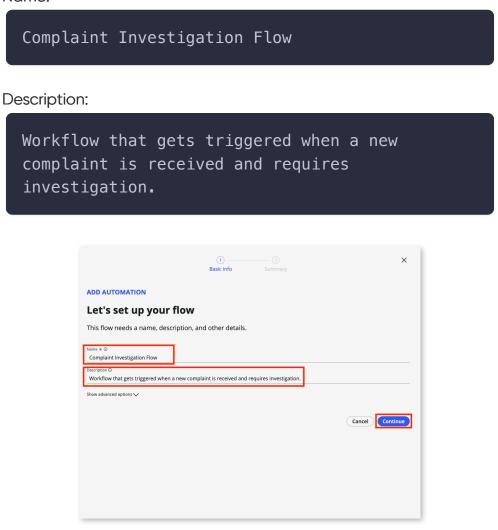


3. To help you get started quickly, we've provided a set of common flows we see our customers building. In addition to that, we've built these flows with preexisting integrations to collboration tools like Teams. We, however, will be starting from scratch. Click on **Build from scratch**

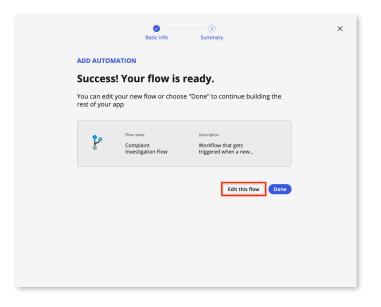
OMATION			
-		vorkflow to your app?	?
from scratch. <u>Learn more abc</u>			
e Build from scratch	When an incident is closed, post a message to Twitter	Send a notification to a workspace	
	ω	() () () () () () () () () () () () () (
Post a weekly reminder to a workspace	Create an approval for a requested catalog item	Create a Zoom meeting and notify a workspace when a ServiceNow	
		∞ ∞ ©	
Create a new row in a spreadsheet from a record update	Create a new row in a spreadsheet from a record	Create a new issue in Jira when a SN record is created	

4. Set the following values for your new flow and click Continue:

Name:



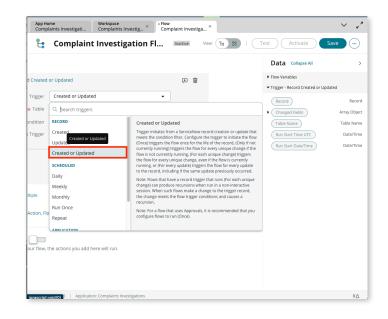
5. On the Success! Your flow is ready screen, click Edit this flow



6. This will open Flow Designer where we can define our trigger and our resultant actions in our workflow. Click Add a trigger

App Home Workspace Flow Complaints Investigati Complaints Investig × Complaint Investiga ×	× *
Complaint Investigation Fl Instrue Veric Te 😫	Test Activate Save
TRIGGER	Data >
+ Add a trigger	Flow Variables
ACTIONS Select multiple	 Trigger
+ Add an Action, Flow Logic, or Subflow	
ERROR HANDLER	
Status: Draft Application: Complaints Investigations	٥۵

7. Choose Created or Updated in the dropdown.



8. To complete the trigger confguration, set the following values and click Done:

Field Name	Value
Table	Complaint Case [sn_complaint_case]
Condition	Requires Investigation is True

App Home Complaints Investigat X Complaints Investig X Complaint Investiga X	
Complaint Investigation Flow	View: 18 88 1
TRIGGER	
complaint Case Created or Updated where (Requires Investigation is true)) 1 1
Trigger Created or Updated -	
Image: With the set of the	
Condition All of these conditions must be met Requires Investigation ♥ Is ♥ (true or	
New Criteria	
Run Trigger Once Advanced Options	Delete Cancel Done
ACTIONS Select multiple Add an Action, Flow Logic, or Subflow	
ERROR HANDLER	
Status: Modified Application: Complaints Investigations	

9. Now that we know when our flow is going to execute, let's tell it what we want it to do. Under Actions click the + Add an Action, Flow Logic, or Subflow then click Action

App Home Complaints Investigati Vorkspace Complaints Investigati ×	Flow Complaint Investiga ×	View: 🕫 👪
TRIGGER Complaint Case Created or Updated with ACTIONS Select multiple Concentration Concentratio Concentration Concentration Concentration Co		
C. Search Actions ERROR HAN Most Recent If an error occ Most Recent Servicehow Core Servicehow Core AES Poral UTerplate C. AES Poral UTerplate C. Collaboration Request App Engine Studio	Process Case Types CM Case Types Look Up Records Servicetivo Core Create new record producer ASC status Builder Log Servicetivo Core Create Templated Role Giobal Create Templated ACL Giobal	

10. In the Search Actions field, type Create Record and choose the Create Record option listed in the right column

TRIGGER			
-	Complaint Case Created or Updated w	hare (Dequires Investigation is true)	
-	complaint case of cated of opdated in	fore (reduites intestigation is data)	
ACTIONS	elect multiple		
(\times)	Ge Action - C Flow Logic	۹. Subflow	
<u> </u>	Q Create Record		
FRROR HAN	INSTALLED SPOKES	Create Record Default	
If an error oc		Create Record O	
	Global		
	NOT INSTALLED SPOKES		
	Salesforce Marketing Cloud		

11. Set the Table field to our **Complaint Investigation** table we created in our first exercise in App Engine Studio. Then set the **Fields** as shown below then click **Done** when complete:

(i) NOTE

Values highlighted in bold below indicate we are dot walking to the fields we need in our workflow

Field Name	Value
Complaint	Trigger - Record Created or Updated - Complaint Case
Case	Record

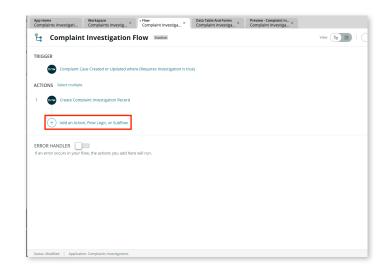
Field Name	Value
Subject	Investigation required for Trigger - Record Created or Updated - Complaint Case Record - Number
Description	Trigger - Record Created or Updated - Complaint Case Record - Short Description
Contact	Trigger - Record Created or Updated - Complaint Case Record - Contact
Assignment Group	Complaints Investigation

When you're finished, your action should look similar to this:

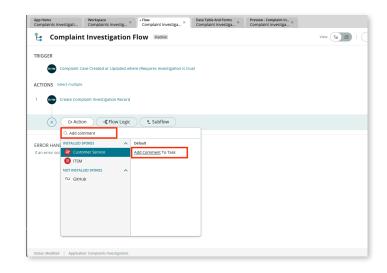
App Home We Complaints Investigati Co	erkspace Flow Complaint Investiga	×	Data Table And Forms Complaint Investiga × Preview - Complaint In ×		
😋 Complaint In	vestigation Flow Inactive				View: 18 28
TRIGGER					
Complaint Case C	reated or Updated where (Requires Investigation	is true)			
ACTIONS Select multiple					
1 Create Complaint	Investigation Record				ð æ ē 🗹
Action	Create Record	÷			
* Table	Complaint Investigation [x_snc_complaints	ו	ĸ		
* Fields	Complaint Case	ו	Trigger + Complaint Case X	ĸ	Θ
	Subject	ו	Trigger - Record > > Num X	ĸ	Θ
	Description	ו	Trigger + + Short descr X	R,	Θ
	Contact	ו	Trigger - Record + + Cont X	R,	Θ
	Assignment group	ו	Complaints Investigations X -	R,	Θ
	+ Add field value				
			Delete	_	ancel Done
			Delete		Done
	u Lasta as Publicu				
Status: Modified Application: Co	mplaints investigations			_	

12. Next, we want to make sure we indicate in the complaint case record that we have automatically created this investigation. This will ensure that anyone

who looks at the case later will know we've taken action. Let's add a new action by clicking the **+ Add an Action**, Flow Logic, or Subflow button under the action we just created then click Action



13. This time we're looking for the Add Comment To Task action. In the Search field, type Add comment and select the option that appears under the Customer Service spoke



14. Complete the action with the following values then click Done:

(i) NOTE

Values highlighted in bold below indicate we are dot walking to the fields we need in our workflow

Field Name	Value
Task [task]	Trigger - Record Created or Updated - Complaint Case Record
Comment	Created investigation task: 1 - Create Record - Complaint Investigation Record - Number

When you're finished, your action should look similar to this:

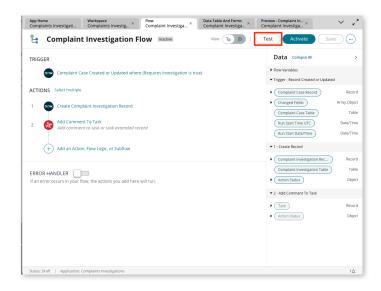
App Home Complaints Investigati Verspace Complaints Investig × Flow Complaint Investiga ×	Data Table And Forms Complaint Investiga × Preview - Complaint Investiga ×
Complaint Investigation Flow	View. (12 88)
TRIGGER Complaint Case Created or Updated where (Requires Investigation is true	2)
ACTIONS Select multiple	
1 Create Complaint Investigation Record	
2 Add Comment D Task Add Comment to task or task extended record Action Add Comment To Task Task (Task) Tigger - + Complet Case _ X) Comment Create Investigation task: (1-Create New, + Numb. X)	
	Delete Cancel Done
Add an Action, Flow Logic, or Subflow	
ERROR HANDLER	
Status: Modified Application: Complaints Investigations	

15. Time to test! Save your flow and click the Test button at the top of the screen.

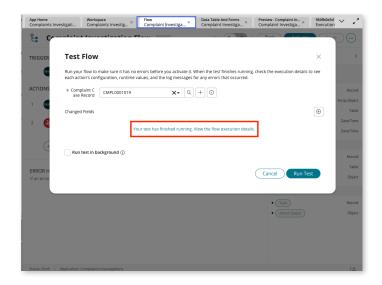
When prompted, choose the complaint case we created earlier in our lab

(i) NOTE

Your complaint number may vary from the one reflected in the lab guide.



16. To view your test results, click the link on the pop-up



17. Here you will be able to view any errors or resultant records that are created as part of your workflow. If you received errors, go back and take a look at your flow to ensure everything has been completed correctly. If it was successful, you should see Test Run – Completed at the top of your screen

_	Consulation	vestigation Flow			n	
EXECUTION	DETAILS Complaint In	nvestigation Flow C	Test Run - Completed	• Op	en Flow Open (Context Record
Hide Action De	tails		5	tate	Start time	O
FLOW STATI	STICS	Run as: Devon Samrah Open I	Flow Logs 🖸 🛛 🕻	ompleted	2023-09-27 18:17:01	881ms
TRIGGER						
now	Complaint Case Create	d or Updated Open Cur	rrent Record ①			
ACTIONS						
ACTIONS						
1 now	Create Record		Core Action	ompleted	2023-09-27 18:17:01	741ms
	Configuration Details					
	VARIABLE NAME	RUNTIME VALUE	CONFIGURATION TYP			
	Table	x_snc_complaints_0_complaint_investigation	x_snc_complaints_	westigation Name		
	Fields	parent=bb5dba26d874fd107f441acc79fca600 shor_description=Investigation required for CMPL0001019 des	parent= Trigger short_description= Trigger-Record description= Trigg contact= Trigger-1 assignment_group estigations;"valgetors;"valgetors; 493a/6d6ee5/6";"sys_	Investigation r • Num • Sh Record • • Sh -{"display":"Co ':"a7f5251039	equired for ort descr Cont Walue Value Value Value	
	Output Data					
	VARIABLE NAME	RUNTIME VALUE	CONFIGURATION		TYPE	
	Action Status	{"Action Status":{"code":0,"message":"Succes s")}			Object	

18. Finally, let's see what this looks like for Devon in her new Workspace. Go back to App Home and Preview the Workspace again.

Basic Info	App Home Complaints Investigati	~ <i>"</i> *
Data	Complaints Investigatio 💩 🧿 💷	
Experience		
Logic and automation	All (13) Data (2) More ▼ Search all Q Data< ⊙ Add	
Security	Store information in your app	
Launch	Complaint Inv Data import Data mapping I Last edited 2023-0	
	Complaint Inv Table Table Is a way t Last edited 2023-0	
	Experience ③ Add See all (7) Create interfaces for users to interact with the app	
	Complaint Inv Form Last edited 2023-0	
	Complaint Cas Form Last edited 2023-0 •••	
	Complaints In Workspace Last edited 2023-0 PREVIEW ···	
	Logic and automation ^(a) Add See all (1) Add automated workflows to improve productivity	
	Ymag Complaint Inv Flow - record Workflow that Last edited 2023-0 ···	
Guidance 🛈		

19. Notice there is now an unassigned Investigation for Devon awaiting her on the workspace homepage. Click on the 1 under **Unassigned Investigations** to view the list of investigations that are unnassigned

0	ngm All	Favorites	History	: (Complaints Invest	ti 🕸	۵,	Application scope:	Complaints Investigat	ions 🜐	<i>₽</i> 4 ©	4	6
ଭ) Home	+											•••
	Comp	laints I	nvesti	gation	-						0	Edit	÷
	My Investi 1	gations			Unassigned	Critical Investiga	iritical Investigations						
	Complaint Cases by Account												
			Boxeo		Avid Corporation	id Corporation 📕 Box		Boxeo USA		Boxeo USA			
	My Work	1m ago.	s	ubject		Contact	c	ontract	Assignmen	t group		0	
	Delayed Si			velayed Shipi		Amy Pascal		my Pascal	Complaint				- 1
	Delayed St	npment	U	relayed Shipi	ment	Anny Hascal	μ	any PasCal	Complainte	mvestigat	UIIS		

20. Click on the record that appears in the list to view the newly created investigation record. Your screen should look very much like the screen below!

Home Unassigned Inves		01019 ୭			Save
Complaint Investigation	ı	^	Compose	Attac	chments
Number CMPLINV0001007 Contact Julie Lewis	Priority 4 - Low State Open	•		e ork notes vate)	
Assignment group Complaints Investigations Assigned to	Complaint Case CMPL0001019 0.	Φ Q	Activity V Q		No Attachments Available
Active Subject			State Open Impact 3 - Low Priority 4 - Low Opened by Devon Samrah	Brav	voe for a file to add it as an attachment Browse
Investigation required for CMPLC Description Product came damaged	001019				
Work notes					

That's it! You've successfully created automation necessary to create a new investigation when a complaint case requires investigation.

(i) NOTE

Next Steps for Devon:

In the real world, once Devon is happy with her app, she would submit the app for review and approval by the App Engine Administrators.

For the purposes of our lab today, we will not cover those steps, however if you are interested in learning more about how we govern all aspects of application development in ServiceNow, please reach out to your Creator Workflows team.

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