Yokohama Telecommunications, Media, and Technology

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Table of Contents

Telecommunications, Media, and Technology

The ServiceNow® Telecommunications, Media, and Technology (TMT) product suite brings together customer care, operations, order management, and partner ecosystems so that service providers can scale their business to capitalize on the fast-growing "everything-as-a-service" opportunity.

Account Lifecycle Events

Provide a structured, onboarding experience for technology industry providers.

Field Service Management for Telecommunications

Manage the field service workflow for the telecommunication industry customers.

Now Assist for TMT

Helps to summarize service problem cases, generate the case resolution notes, and summarize tests.

Proactive Service Experience Workflows

Deliver end-to-end workflows to resolve network related incidents, and proactively notify impacted customers.

Sales and Order Management

Capture, manage, and fulfill customer and external service orders.

Service Exchange

Help customers and providers connect and track service requests directly between their instances.

Strategic Portfolio Management for Telecommunications

Define and customize the tasks and requirements for your Fiber Rollout and 5G projects.

Telecommunications Network Inventory

Build and monitor your physical, logical networks, and provisioned services.

Telecommunications Service Operations Management

Proactively monitor the health of your networks and services to prevent downtime.

Customer Success Management

The ServiceNow® Customer Success Management application enables service providers to streamline, automate, and measure critical workflows across the entire enterprise customer journey—from onboarding and adoption to renewals.

Watch this short video for an introduction to the Customer Success Management application.

https://player.vimeo.com/video/1063358476?h=f0630a270f&badge=0&autopause=0&player_id=0&app_id=58479

By embedding workflow automation into customer success management, Customer Success Management helps providers enhance customer experiences, accelerate time to value, and maximize return on investment. It also fosters seamless collaboration between the accounts, sales, and delivery teams, all within the unified ServiceNow AI Platform.

Get started

Explore Account Lifecycle Events	Account onboarding	Customer success
		
Learn about the Account Lifecycle Events application	Define a structured, repeatable, onboarding experience with the preconfigured playbook.	Track success objectives, outcomes, help mitigate risks, and identify opportunities for expansion and renewal.

Additional resources

- Learn more about what's new and changed, see the Account Lifecycle Events release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Service Management features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Field Service Management for Telecommunications

The ServiceNow Field Service Management for Telecommunications (FSMT) application enables you to manage the field service workflow for the telecommunications customers. Use this application to streamline the appointment booking, service delivery, and assurance processes.

The ServiceNow Field Service Management for Telecommunications (FSMT) application integrates with the Field Service Management (FSM) to manage and streamline field service workflows for the telecommunications industry. The FSMT supports the TM Forum-aligned Open

APIs and their functionalities that enable an open digital ecosystem. These APIs promote faster integration with Field Service Management to manage appointment booking, service delivery, and assurance processes.

To learn more about Field Service Management application, see Field Service Management.

Managing the appointments for telecommunication services

Manage the appointments for the field services to enable the installation, activation, and site assessments that are needed for connectivity services.

Overview of appointment management

With the use of the ServiceNow Telecommunication Open API application, you create appointments from your system for the connectivity-related field services. You can book an appointment on an existing work order and assigned it to the field service agent. To learn more about booking appointments, see Manage appointments.

The Telecommunication Open API application uses the TM Forum 646 API to support the external system to create and manage appointments for the field services.

This feature supports the following:

- Supports POST operation for appointment via `appointment management API`.
- Understands the appointment data model available in the Field Service Management application.
- Supports POST operation to create an appointment in the Field Service Management application for a work order.
- Supports required validations for the incoming data for appointment creation for an available time slot via `search time slot API`.

Configuring the appointment booking feature

To manage appointment bookings in your system, you must create, modify, or enable the application configuration and the individual service configurations. Do the following steps to configure the appointment booking feature:

1. Configure an appointment booking record producer.
2. Create or modify service configuration for Appointment Booking.
3. Configure variables in a record producer for appointment booking.

Now Assist for Sales CRM for Telecommunications

Use the ServiceNow® Now Assist for Sales CRM for Telecommunications application to automate enrichment and fulfillment tasks. This helps customers introduce new offerings without the need to build complex subflows. These AI Agents automatically suggest new tasks based on similarities with previous orders and also provide flexibility by auto-correcting the agent's inputs related to new tasks.

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
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Troubleshoot and get help

- ServiceNow Community AI & Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

For more information, see the Now Assist documentation.

Using agentic workflows in Now Assist for Sales CRM for Telecommunications

Use the Now Assist for Sales CRM for Telecommunications to complete tasks autonomously.

Enable security implementation to execute AI agents and agentic workflows through access control lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in Now Assist AI agents.

> **Important:**
> By default, all agentic workflows and AI agent records are read only.
>
> To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:
>
> - Activate the agentic workflow.
> - Activate all agents within the agentic workflow.
> - Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

Once you duplicate the agentic workflow, adjust the settings according to your requirements. Next, you activate the duplicated agentic workflow. You can also test the agentic workflow to analyze its performance in the AI Agent Studio, while it executes the instructions that you defined.

Looking for an AI agent?

- There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available on your instance, see Find AI agents.
- To find agents that might not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

Standalone agents in Sales CRM for Telecommunications

Use these standalone AI agents to autonomously complete Sales CRM for Telecommunications tasks.

Standalone agents in Now Assist for Sales CRM for Telecommunications

The following AI agents are available with Now Assist for Sales CRM for Telecommunications:

- Now Assist for Sales CRM for Telecommunications AI agent collection Order Enrichment AI agent
- Now Assist for Sales CRM for Telecommunications AI agent collection Order Fulfillment AI agent

Now Assist for Sales CRM for Telecommunications AI agent collection Order Enrichment AI agent

Use the Order Enrichment AI agent to collect customer order information, identify if the order needs enrichment, and create enrichment tasks.

Order Enrichment AI agent overview

The Order Enrichment AI agent creates a task and triggers the order fulfillment AI agent upon its completion. On closure of the enrichment task, it invokes the order fulfillment agent.

Given a top Order Line Item (OLI) finds all tasks needed to enrich it and all it child OLIs.

For each top order line item (OLI) and its child OLIs, the Order Enrichment Agent uses historical data from similar orders to determine which enrichment tasks are required.

To activate the Group Action Framework (GAF), see Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications.

If needed, the outcome of the order tasks can be modified by the agent.

When an order line item is created, if an enrichment process isn't defined for that order line specification, a place order task is created. When this task is assigned to an agent, it triggers the Enrichment AI Agent for this order line item.

If the specification enrichment tasks defined in the decision table aren't available to create the enrichment tasks, the default flow Trigger EnrichmentAI Agent is triggered to create the enrichment tasks for an order line item during the enrichment process. To configure the order enrichment flows using Decision Tables, see .

To modify the Order Enrichment AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Role required: sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent

> **Important:**
> In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Order Enrichment AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Order Enrichment AI agent**.

Testing the AI agent

To access the use case testing page:

- Navigate to **All** > **AI Agent Studio** > **Testing**.
- On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications

Activate the Group Action Framework (GAF) to enable Now Assist AI agents to collect information about the related records across your instance.

Before you begin
Role required: admin

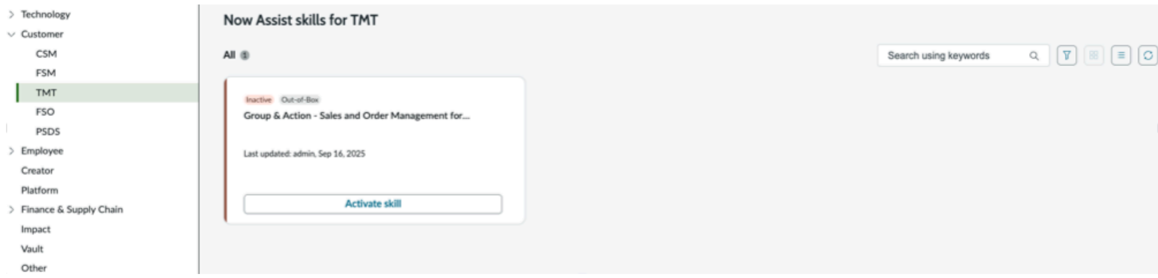
Selected application scope: Now Assist for Sales and Order Management for Telecommunications.

In the Request Definitions, select **Index All Tables**.

In the request_characteristic, select **Index All Tables**.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills** > **Customer** > **TMT**.
2. In Group & Action - Sales and Order Management for Telecommunications, select **Activate skill**.



3. Optional: On the form, select **Edit** to change the values.

4. Select **Save and continue**.

5. On the **Review and activate** tab, select **Done**.

Result

GAF is activated on your instance for the Now Assist application and can be used by AI agents to find related records.

Now Assist for Sales CRM for Telecommunications AI agent collection Order Fulfillment AI agent

Use the Order Fulfillment AI agent to identify the tasks required for domain orders by using historical data from similar orders.

Order Fulfillment AI agent overview

The Order Fulfillment AI agent uses historic order tasks to create the order tasks. If the historic data doesn't return any results, then an LLM is used to get the response. After decomposition, the Fulfillment AI Agent creates order tasks by checking historical and applicable tasks.

Based on the domain order, this agent retrieves a list of tasks that must be fulfilled. For each such domain order, it uses historical data from similar orders to find all such tasks.

If the Product offering or Category fulfillment tasks defined in the decision table aren't available to create the fulfillment tasks for product, service, and resource, the default flow Service order Trigger Fulfillment AI Agent, Resource order Trigger Fulfillment AI Agent, and Product order Trigger Fulfillment AI Agent is considered to create the fulfillment tasks for an order line item during the fulfillment process. For more information on configuring decision tables, see Decision tables.

When a domain order is created, if a fulfillment process isn't defined for that domain order specification category, a place order task is created. When this task is assigned to an agent, it triggers the Fulfillment AI Agent for this domain order.

To modify the Order Fulfillment AI agent, Duplicate an agentic workflow, and adjust the settings according to your requirements.

The Order Fulfillment AI agent adds tasks apart from the generated tasks from GAF. To activate the GAF, see Activate Group Action Framework for Now Assist for Sales CRM for Telecommunications. The GAF and AI search are both used for order tasks.

Role required: sn_somt_gen_ai.sales_and _order_fulfillment_ai_agent

> **Important:**
> In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

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Order Fulfillment AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Order Fulfillment AI agent**.

> **Important:**
> In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Testing the AI agent

To access the use case testing page:

- Navigate to **All** > **AI Agent Studio** > **Testing**.
- On the Overview page, select **Test use cases**.

Now Assist for Telecommunications, Media and Technology (TMT)

Use the ServiceNow® Now Assist for Telecommunications, Media and Technology (TMT) application to summarize service problem cases, account onboarding cases, engagements, touchpoints, generate the case resolution notes, and summarize tests. You can enable your agents to understand the case context and test results so that they can propose quicker resolutions to your customers. Additionally, you can automate transformation mapping between provider and consumer instances in Service Exchange.

Get started

Explore	Configure	Use Now Assist for TMT generative AI
Learn more about Now Assist for TMT	Configure Now Assist for TMT	Use generative AI capabilities offered by Now Assist for Telecommunications, Media and Technology (TMT)

Use Now Assist for TMT AI agent collection

Use agentic workflows in Now Assist for TMT

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Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect case information (for case summarization) and test run information (for test summarization).

Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Telecommunications, Media and Technology (TMT)

With the Now Assist for Telecommunications, Media and Technology (TMT) application, your agents can use generative AI to summarize service problem cases, account onboarding cases, engagements, touchpoints, internal plays, customer plays, successive initiatives, tests, risk signal and issues, and generate resolution notes. Additionally, you can automate transformation mapping between provider and consumer instances in Service Exchange.

Overview of Now Assist for TMT

The following generative AI capabilities are available:

Telecommunications Now Assist capabilities

- A service problem case summary enables an agent to gather the case context on long-running or complex cases. Because these cases can contain several details, including conversation with customers or other agents, generating a summary can help agents to get a quicker understanding of the case.
- The case resolution notes can help an agent to wrap up cases faster and provide the context about the case resolution to the other agents who might encounter similar issues.
- A test summary assists an agent with obtaining the test results that were generated after executing the test runs. It provides a high-level overview of the test run in a clear format.
- Knowledge generation can help an agent to streamline content creation. An agent can automatically generate knowledge articles by using the relevant data from the case record after proposing a resolution or closing the case. By not having to generate knowledge articles manually, this feature can save your agents valuable time and effort.
- The customer service summary skill provides you with a concise summary of a sold product, including the current situation, root cause indicators, critical actions, and resolution details.

Technology Now Assist capabilities

- An account onboarding case summary enables an agent to gather case context on onboarding cases. Agents can generate a summary to gain understanding of any stage of the onboarding cycle.
- An engagement record summary can enable an agent to summarize initiatives, outcomes, risks, and internal plays associated with an engagement.
- A touchpoint record summary can enable an agent to summarize meetings and emails exchanged during the engagement life cycle.
- A customer play record summary that includes details of the record and all the associated tasks.

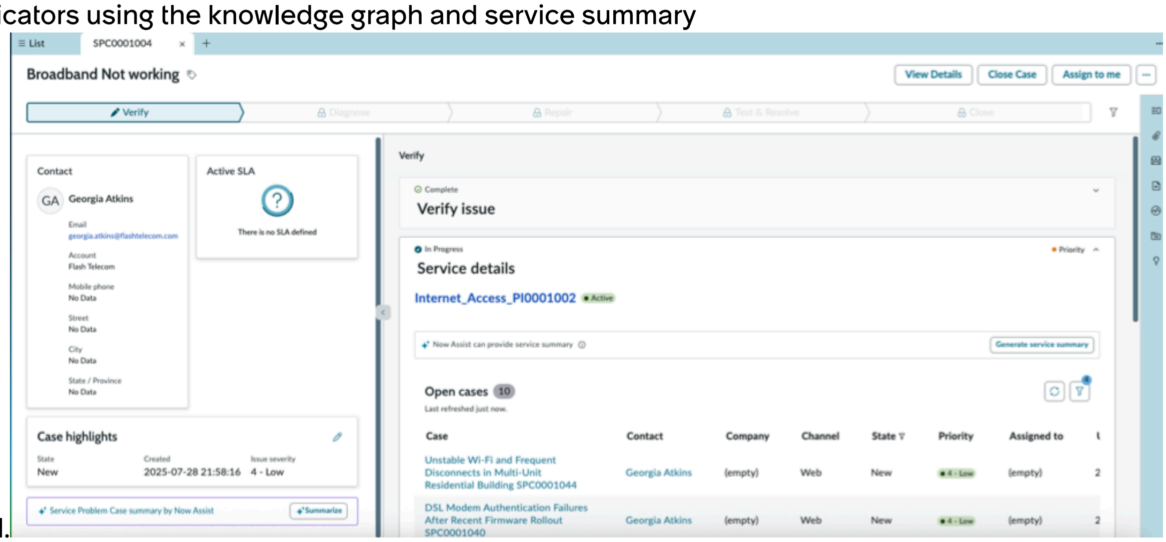
- A internal play record summary that includes details of the record and all the associated tasks.
- A success initiative record summary that includes details of the record and all the associated tasks.
- Collects and analyzes metric data, processes large data sets, identifies patterns and anomalies.
- Transform map assist enables providers to automatically generate transform maps between provider and consumer tables.
- The risk signal and issues summarization skill provides you with a summary of risk history and resolution context.

Skills

The Now Assist for TMT application includes the following generative AI skills:

Customer service summary

Summarize the service details mentioning the current situation, any critical actions to be taken and find the root cause indicators using the knowledge graph and service summary



skill.

Service Problem Case summarization

Generates a summary of a service problem case, including the issue and the actions taken. An agent can generate a summary of a case to understand the case context, refresh the summary so that it includes the latest updates to the case, and post the summary to the case work notes.

The service problem case summarization skill generates a service problem case summary and displays it below the Case highlights card. The summary includes the information that the agent or customer enters in the following service problem case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Diagnostic Task

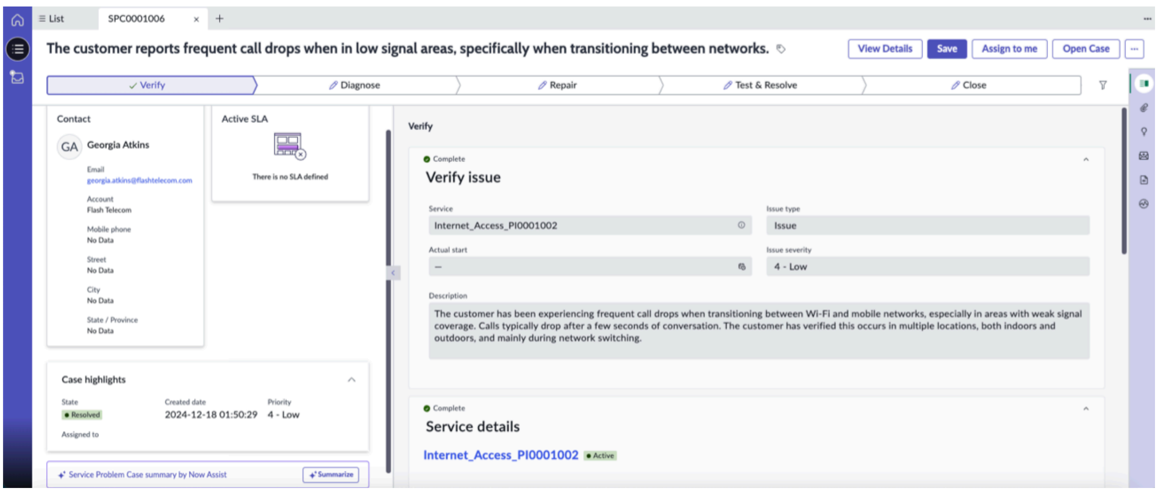
Fields:

- Description
- Short description
- Work notes
- state
- sys id

• Resolution Task

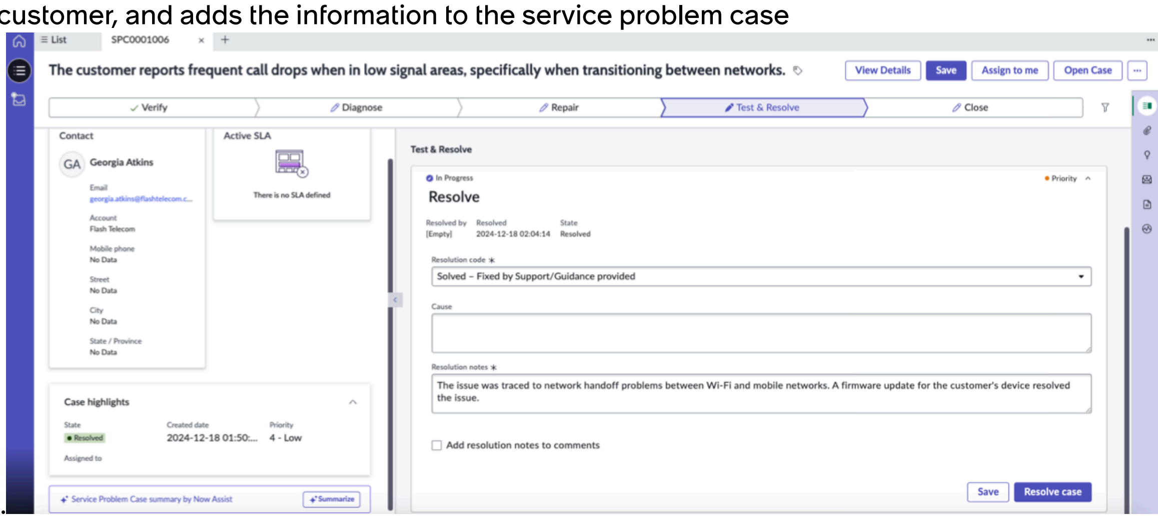
Fields:

- Description
- Short description
- Work notes
- state



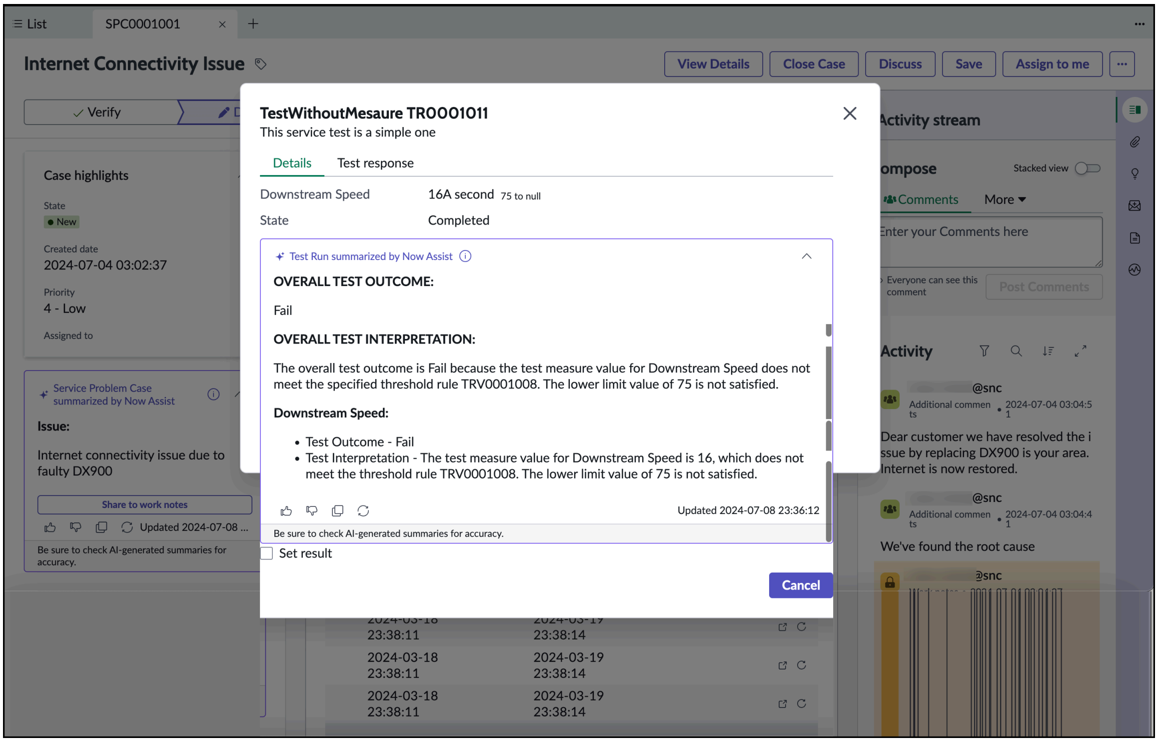
Resolution notes generation

Generates resolution notes for a service problem case, proposes the resolution to the customer, and adds the information to the service problem case record.



Test summarization

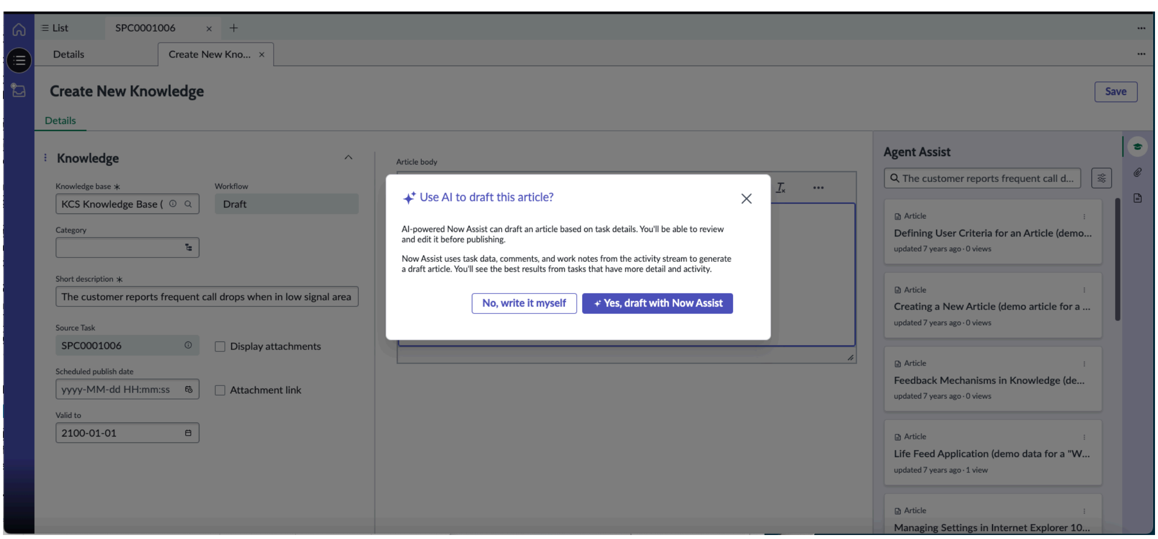
Generates a test run summary after the test is executed. It includes the main points covered during the test execution, including the test output, test interpretation, and other defined test parameters. An agent can generate a test summary of the executed tests to identify the root cause of the problem.



Knowledge generation

Generates a knowledge article from a case after proposing a resolution or closing the case.

The knowledge generation skill displays a pop-up window that an agent can use to generate a knowledge article that is based on similar cases and review it before publishing the knowledge article draft.

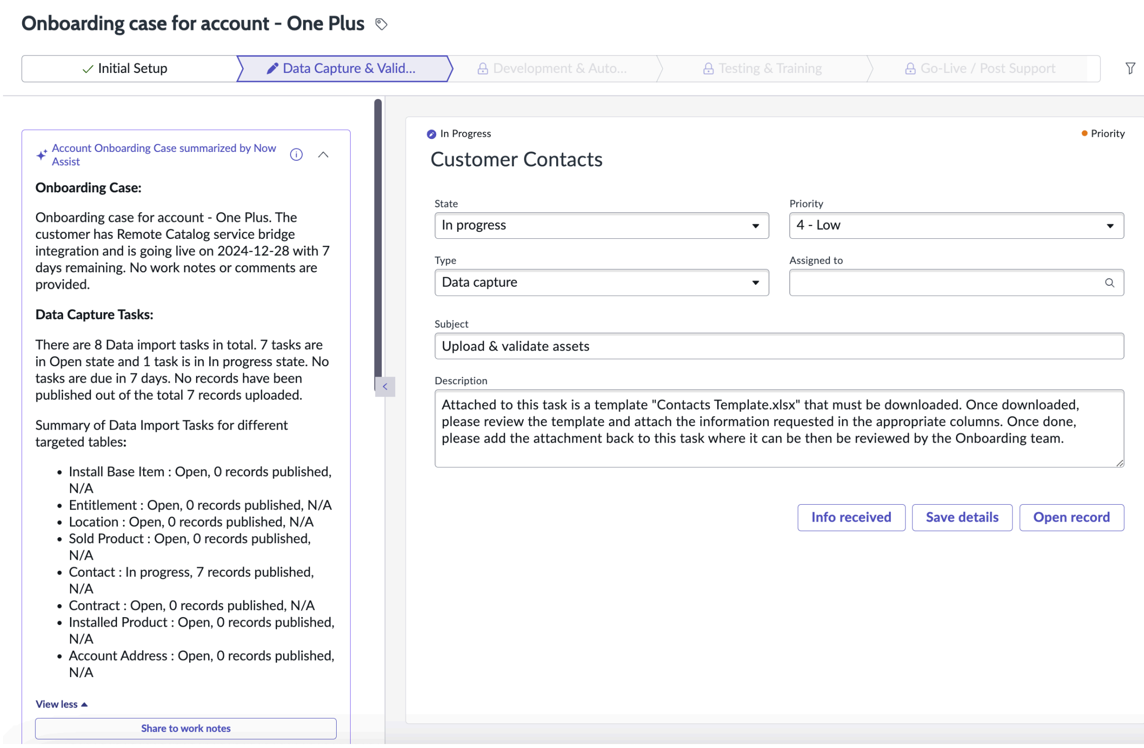


Account onboarding case summarization

Summarizes an account onboarding case, including details about each stage in the account onboarding lifecycle. Agents can quickly get up to speed on the status of the onboarding case and case tasks with a high-level summary of key points of information.

The account onboarding summarization skill generates an onboarding case summary and displays it above the Activities card. The summary includes the information that the agent enters during the following stages of the account onboarding lifecycle:

- Initial Setup
- Data Capture & Validation
- Development & Automation
- Testing & Training
- Go-live & Post-Support

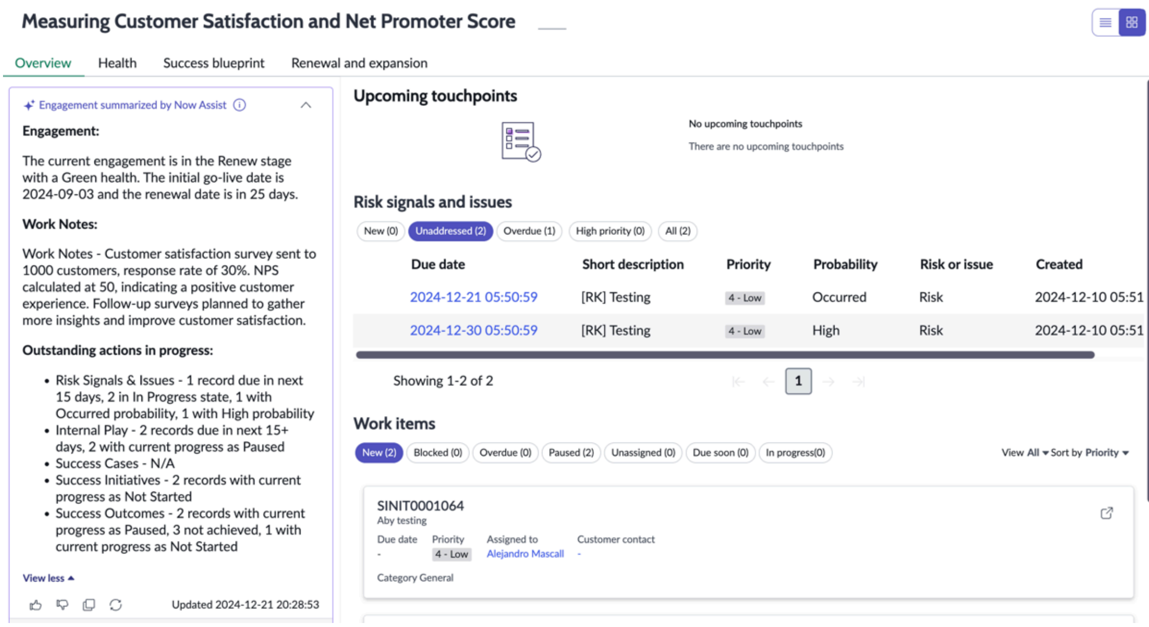


Engagement summarization

Generates the summary for an engagement including preconfigured parameters such as risks, initiatives, outcomes, cases, and internal plays. Customer success managers can quickly get up to speed on all activities and the overall engagement with a high-level summary of the key points of information.

The engagement summarization skill generates a summary of the engagement including the status, go-live date, renewal date, worknotes, and any outstanding actions and displays it above the Account details card. The summary includes the information that the agent enters in the following engagement record fields:

- Title
- Description
- Work notes

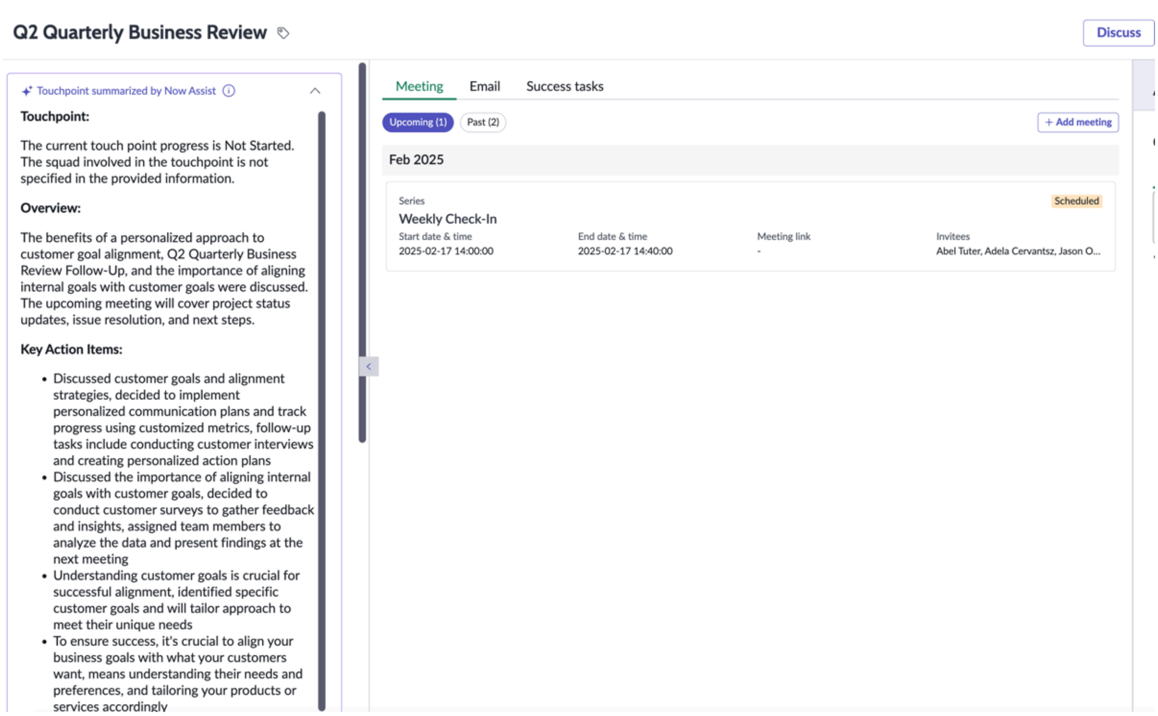


Touchpoint summarization

Generates a summary of the different touchpoints in the engagement lifecycle. Customer success managers can get a quick summary of all meetings and emails exchanged between the different stakeholders and any follow up activities.

The touchpoint summarization skill generates a summary of the touchpoints including the meeting agenda, meeting type, type of meeting, and emails. The summary includes the information that the agent enters in the following touchpoint record fields:

- Subject
- Description
- Work notes
- Additional comments



Transform mapping assist

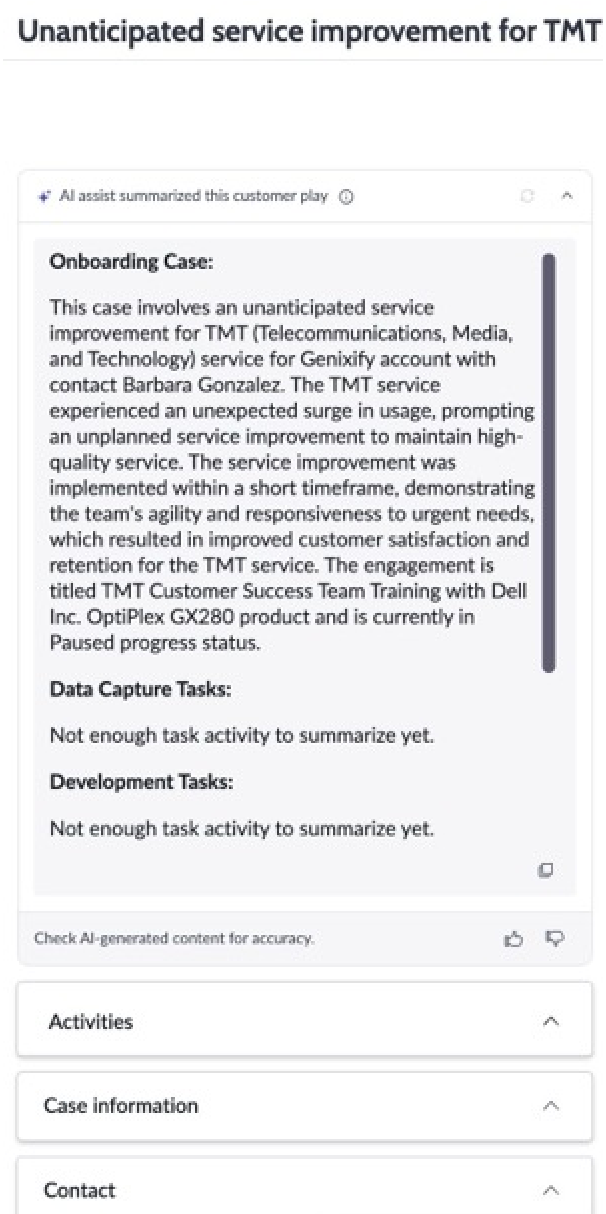
Uses the NOW Large Language Model (LLM) to enable Service Exchange providers to automatically generate a transform mapping between provider and consumer tables. This skill enables providers to streamline the transformation mapping process by reducing errors and improving overall efficiency.

Customer play summarization

Generates a summary of the customer play and includes the record details and associated customer play tasks.

The customer play summarization skill generates a summary of the customer play record and highlights critical information such as the number of tasks due in the 7 days or days remaining to close the record. The summary includes the following sections:

- Overview
- Progress updates
- Next steps

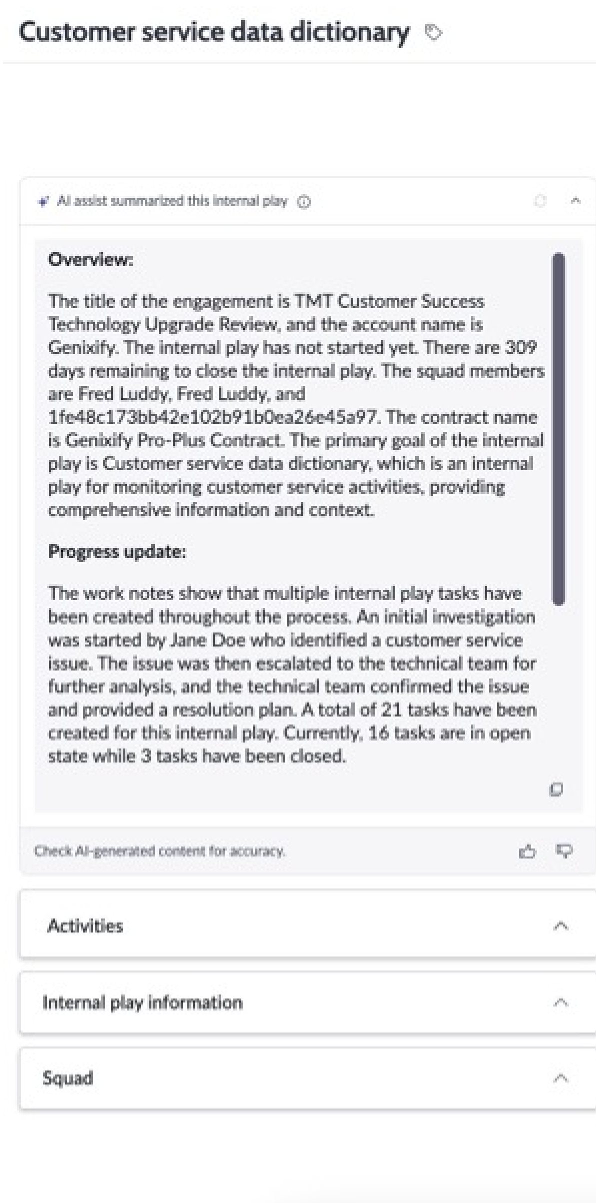


Internal play summarization

Generates a summary of the internal play and includes the record details and associated internal play tasks.

The internal play summarization skill generates a summary of the internal play record and highlights critical information such as the number of tasks due in the 7 days or days remaining to close the record. The summary includes the following sections:

- Overview
- Progress updates
- Next steps

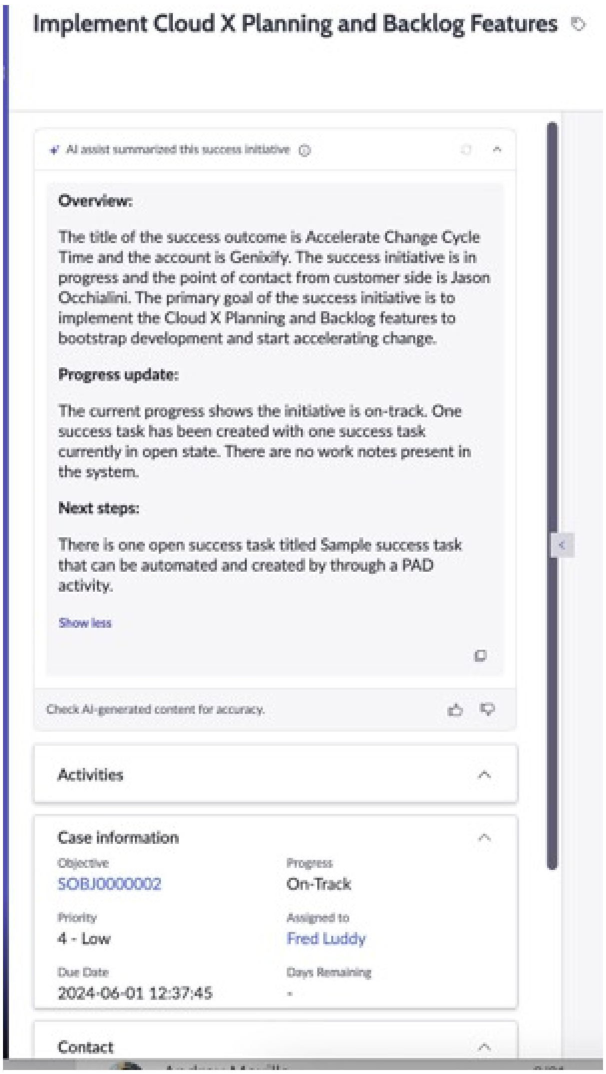


Success initiative summarization

Generates a summary of the success initiative and includes the record details and associated success tasks.

The success initiative summarization skill generates a summary of the success initiative record and highlights relevant critical information. The summary includes the following sections:

- Overview
- Progress updates
- Next steps



Analyze metric data trend

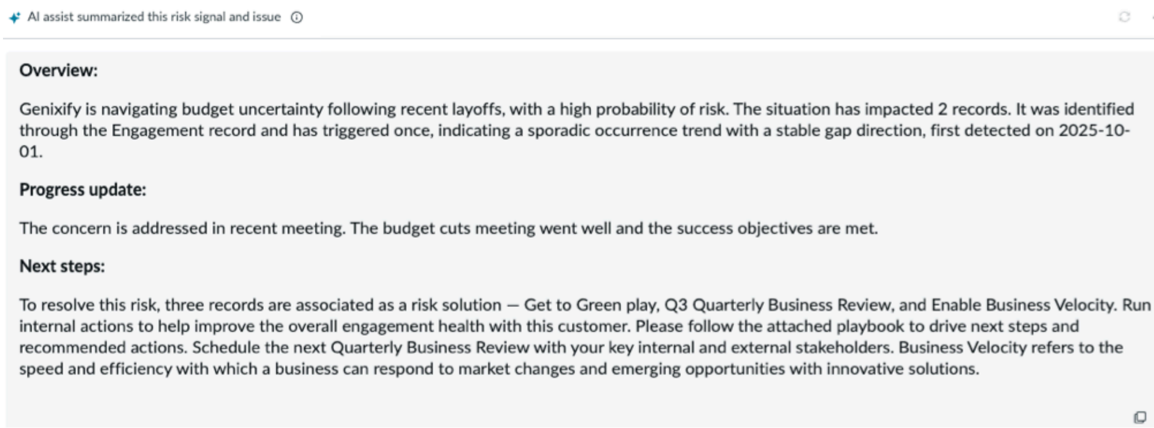
Collects and analyzes metric data, processes large data sets, identifies patterns and anomalies. Provides clear actionable insights that enables the Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow to make informed decisions and take appropriate actions.

Risk signal and issues summarization

Generates a summary from a risk signal and issues summarization record, risk solution and risk occurrences.

The risk signal and issues summarization skill generates a summary of the risk signal and issues record and highlights relevant critical information. The summary includes the following sections:

- Overview
- Progress update
- Next steps



Now Assist panel in CSM/FSM Configurable Workspace

An agent can use the Now Assist panel in CSM/FSM Configurable Workspace.

This conversational interface enables an agent to request a service problem case summary and generate the service problem case resolution notes. For more information about the Now Assist panel, see Now Assist panel.

Related topics

Now Assist

Exploring Now Assist

Supporting information for Now Assist for Telecommunications, Media and Technology (TMT)

Get a quick overview of the important information that is related to the Now Assist for Now Assist for Telecommunications, Media and Technology (TMT).

Supported versions

Now Assist for TMT is supported starting with Xanadu.

Supported user interfaces

Now Assist for TMT application includes the skills that are listed in the following table.

Now Assist for TMT supported interfaces

CSM/FSM Configurable Workspace	• Service problem case summarization • Resolution notes generation • Test summarization • Knowledge generation • Account onboarding case summarization

Now Assist for TMT supported interfaces (continued)

	• Engagement record summarization • Touchpoint record summarization • Customer service summary • Customer play summarization • Internal play summarization • Success initiative summarization • Risk signal and issues summarization
Core UI	• Service problem case summarization • Test summarization • Knowledge generation • Account onboarding case summarization • Engagement record summarization • Touchpoint record summarization • Customer play summarization • Internal play summarization • Success initiative summarization • Mapping assist • Risk signal and issues summarization

Application information

Activate the Now Assist for TMT (sn_tmt_gen_ai) store app to use the service problem case summarization skills and to generate case resolution notes.

This store app has the dependency on Customer Service Problem Management.

Activate the applications in the following order:

1. Customer Service Problem Management
2. Now Assist for TMT

For more information, see Configuring Now Assist for Telecommunications, Media and Technology (TMT).

Configuring Now Assist for Telecommunications, Media and Technology (TMT)

Configure the Now Assist for Telecommunications, Media and Technology (TMT) application so that your agents can use the generative AI skills in the CSM/FSM Configurable Workspace and in Core UI.

Before you begin

Role required: admin

About this task

Use the Now Assist Admin console to configure Now Assist for TMT. For information needed to install the Now Assist plugins and configure generative AI skills, see Now Assist Admin console.

TMT features and skills in the Now Assist Admin console

TMT features	Skills
Service Problem Case	• Case summarization • Resolution notes generation • Test summarization • Knowledge generation • Customer service summary
Customer Success Management	• Account onboarding case summarization • Engagement summarization • Touchpoint summarization • Customer play summarization • Internal play summarization • Success initiative summarization • Analyze metric trend • Risk signal and issues summarization
Service Exchange	Transform mapping

Note:
The ServiceNow® large language model (Now LLM Service) is currently the only provider for this Now Assist application's skills.

Procedure

1. Install the Now Assist for Telecommunications, Media and Technology (TMT) plugin (sn_tmt_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Application information.
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
   If you're already in the Now Assist Admin console, you can select the **Now Assist Skills** tab on the screen.
3. Activate and configure the skills for the Now Assist for TMT features.
   These features are grouped under the Customer workflow group. Each feature has its associated skills.
4. Select **TMT** under the **Customer** workflow group.

5. On the Now Assist skills for TMT page, select **Activate skill** for the skill that you would like to activate.
   The page for the skill that you activated opens with the General details section highlighted.
6. Review the inputs for the selected skill.

   The input table fields are read-only. For information about the inputs and triggers for each skill, see Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT).

7. After reviewing the inputs for the selected skill, select **Save and continue** to go to the next step. You can return to a previous step by using the **Back** button.
8. In the Define availability section, choose one of the following:
   - To enable the skill everywhere it is available, select **Skill is always available**.
   - To manually set the conditions for when the skill is available, select **Customize skill availability**.
9. After you configure the skill availability, select **Save and continue** to go to the next step.
10. Select where you would like to display the skill.
    - To display the skill on the Mobile Agent app, select **In-product**.
    - To display the skill in the Now Assist panel, select **Now Assist panel**.

      For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

11. After you configure the display for the selected skill, select **Save and continue** to go to the next step.
12. Review your choices and select **Activate** to complete the configuration.

Result
Your skill is configured.

Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT)

Use inputs for each skill to configure how and when a skill is used.

Overview of Now Assist for TMT

Depending on the selected skill, you can configure inputs. These settings determine how a skill is used. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a service problem case summary, resolution notes summary, customer service summary, and test summary.

Domain separation allows users to separate data, processes, and administrative tasks into logical groupings known as domains. Domain separation enables users to independently manage skill configurations, data visibility, and other settings within each domain. Domain separation is possible at the skill level and at the individual configuration level.

Domain separation is possible at the skill level and at the individual configuration level.

Enable security for Now Assist skills and flows through access control lists (ACLs) and user identities. For more information, see Configure ACLs for AI agents and agentic workflows.

To understand more about the ServiceNow domain separation, see Exploring domain separation.

Risk signal and issues summarization skill

The risk signal and issues summarization skill includes the inputs that identify the table and fields that are used when a risk signal and issues summary is generated.

Inputs for the risk signal and issues summarization skill

Input	Description
Input table	Risk signal and issues
Input fields	• Account Name • Priority • Description • Short description • State • Source record • Category Name • Probability

Related input for risk signal and issues summarization skill

Input	Description
Input table	Risk solution
Input fields	• Source record • Source table • impacted_record • impacted_table

Related input for risk signal and issues summarization skill

Input	Description
Input table	Risk occurrence
Input fields	• Start date • End date • Threshold • Gap • Current value • Notes

Customer service summary skill

The customer service summary skill helps user to get information on the customer service issues from their knowledge graph. You can configure the input in the following customer service summarization stages:

- General details
- Graph questionnaire

  To add or modify the queries, see Configure the graph questionnaire Now Assist for Telecommunications, Media and Technology (TMT).

- Customize prompt

  To customize the prompt, see Customize a skill in Now Assist for TMT.

- Define access
- Select display
- Review and activate

Inputs for the customer service summary skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt.admin]

Service problem case summarization skill

The service problem case summarization skill includes the inputs that identify the table and fields that are used when a service problem case summary is generated. You can configure the input in the following service problem case summarization stages:

- General details
- View input
- Customize prompt
- Define availability
- Select display
- Review and activate

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

Inputs for the service problem case summarization skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt_case]
Input fields	• Description • Short description • Work notes • Additional comments

Inputs for the service problem case summarization skill (continued)

Input	Description
	• Diagnostic Task Fields: ○ Description ○ Short description ○ Work notes ○ state ○ sys id • Resolution Task Fields: ○ Description ○ Short description ○ Work notes ○ state
Input templates	• Verify • Diagnose • Repair • Test & Resolve • Close

Resolution notes generation skill

The resolution notes generation skill includes the inputs that identify the table and fields that are used when the resolution notes are generated for a service problem case.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

Inputs for the resolution notes generation skill

Input	Description
Input table	Service Problem Case [sn_sprb_mgmt_case]
Input fields	• Description • Short description • Work notes • Additional comments

Test summarization skill

The test summarization skill includes the inputs that identify the table and fields that are used when a test summary is generated.

The following table lists the inputs that you can configure for the test summarization skill.

Inputs for test summarization skill

Input	Description
Input table	Test Run [sn_st_mgmt_test]
Input field	Name

Related input for test summarization skill

Input	Description
Input table	Test Measure [sn_st_mgmt_test_measure]
Input field	• Metric name • Metric description • Value • Rule violation

Knowledge article generation skill

The knowledge article generation skill includes the inputs that identify the table and fields that are used when the knowledge article draft is generated for a case.

In this release, you can't modify a skill's input data source. The data source contains the tables and fields that the skill relies on.

The following table lists the inputs for the knowledge article generation skill.

Related inputs for the knowledge article generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	• Short description • Description • Resolution notes • Work notes • Comments

Account onboarding case summarization skill

The account onboarding case summarization skill includes the inputs that identify the table and fields that are used when an account onboarding summary is generated. You can configure the input in the following account onboarding case stages:

- Form details
- Data capture
- Development
- Training
- Testing

Inputs for the account onboarding case summarization skill

Input	Description
Input table	Account Onboarding Case [sn_acct_lc_onb_case]
Input fields	• Service Exchange integration • Short description • Description • Go live date • Days remaining • Work notes • Additional comments
Stage - Data Capture	

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Import Task [?]
Input field	• State • Days remaining • Published records • Work notes • Additional comments • Target table • Total records updated

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Task [?]
Input field	• Short description • State • Days remaining • Type • Work notes • Additional comments

Related input for account onboarding skill

Input	Description
Input table	Account Lifecycle Import Task [?]
Input field	• State • Days remaining • Published records • Work notes • Additional comments • Target table • Total records updated

Engagement summarization skill

The engagement summarization skill includes the inputs that identify the table and fields that are used when an engagement summary is generated.

Inputs for the engagement summarization skill

Input	Description
Input table	Engagement [sn_acct_lc_engagement]
Input fields	• State • Stage • Renewal date • Initial go-live date • Perceived health

Related input for engagement summarization skill

Input	Description
Input table	Risk and issue
Input fields	• State • Due date • Probability

Related input for engagement summarization skill

Input	Description
Input table	Internal play
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success case
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success initiative
Input fields	• Due date • Progress

Related input for engagement summarization skill

Input	Description
Input table	Success outcome
Input fields	• Progress • Base value

Related input for engagement summarization skill (continued)

Input	Description
	• Current value • Target value

Touchpoint summarization skill

The touchpoint summarization skill includes the inputs that identify the table and fields that are used when a touchpoint summary is generated.

Inputs for the touchpoint summarization skill

Input	Description
Input table	Engagement [sn_acct_lc_touchpoint]
Input fields	• Squad • Progress

Related input for touchpoint summarization skill

Input	Description
Input table	Meeting details
Input fields	• Conference details • Meeting type • Meeting start time • Meeting end time • Customer notes • Meeting notes • State

Customer play summarization skill

The customer play summarization skill includes the inputs that identify the table and fields that are used when a customer play summary is generated.

Inputs for the customer play summarization skill

Input	Description
Input table	Customer play
Input fields	• Engagement • Account

Inputs for the customer play summarization skill (continued)

Input	Description
	• Progress • Days remaining • Squad • Contact • Short description • Description • Product

Related input for customer play summarization skill

Input	Description
Input table	Success task
Input fields	• State • Short description • Description • Due date

Related input for customer play summarization skill

Input	Description
Input table	Meeting details
Input fields	• State • Name • Meeting start time • Meeting end time

Internal play summarization skill

The internal play summarization skill includes the inputs that identify the table and fields that are used when an internal play summary is generated.

Inputs for the internal play summarization skill

Input	Description
Input table	Internal play

Inputs for the internal play summarization skill (continued)

Input	Description
Input fields	• Engagement • Account • Progress • Squad • Contract • Short description • Description • Product • Days remaining

Related input for internal play summarization skill

Input	Description
Input table	Internal play task
Input fields	• State • Short description • Description • Due date • Days remaining

Success initiative summarization skill

The success initiative summarization skill includes the inputs that identify the table and fields that are used when a success initiative summary is generated.

Inputs for the success initiative summarization skill

Input	Description
Input table	Success initiative
Input fields	• Primary success outcome • Account • Sold product name • Sold product number • Squad • Short description • Description • State

Inputs for the success initiative summarization skill (continued)

Input	Description
	• Contact • Days remaining

Related input for success initiative summarization skill

Input	Description
Input table	Success task
Input fields	• State • Short description • Description • Due date • Days remaining

Banners in Now Assist for Telecommunications, Media and Technology (TMT)

Banners display information about generative AI skills and the form fields that are generated or predicted by those skills.

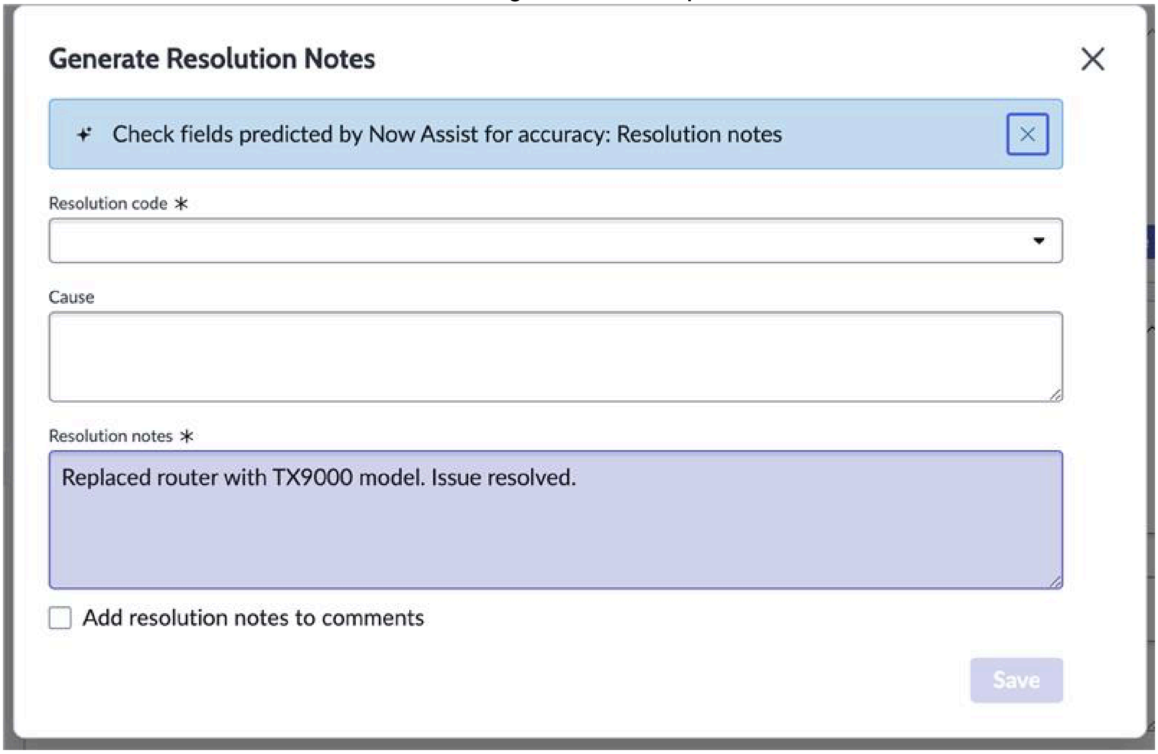
Overview of banners in Now Assist for TMT

The generative AI banner displays information about the fields on a form that are generated or predicted by the skills available with Now Assist for TMT. The messages that appear in the banner do the following:

- Alert agents when fields are being generated or predicted and when the process is complete.
- Remind agents to review the information in these fields.
- Inform agents if fields cannot be generated or predicted.

Messages also include links to the fields that are generated or predicted by Now Assist for TMT.

Generative AI banner in CSM/FSM Configurable Workspace.



Customize a skill in Now Assist for TMT

If you have the admin role, you can customize a Now Assist for Telecommunications, Media and Technology (TMT) skill so that agents can use the generative AI skills in CSM Configurable Workspace and in Core UI.

Before you begin

Role required: admin

About this task

From the Now Assist Admin console, you can select the input table, related records, and fields for each input template of the account onboarding and service problem management, and then configure the prompt headers to include them in the general summary.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Features** to access the **Now Assist Features** tab of the Now Assist Admin console.
2. In the **Customer** workflow group, select **TMT** to view the skills for the Now Assist for TMT features.
3. Activate and copy the Now Assist for TMT feature case summarization skill for customization.
    a. On the feature card that is associated with the skill that you would like to activate, select **View details**.
    b. In the All available skills section, locate the skill you would like to activate and select **Activate skill**.

        You can choose to make a copy of the skill before activating it.

c. Select the More actions icon for the skill in the Active skills section, and create a copy that you can customize by selecting **Make a copy**.

   The copy that you make is listed in the Active skills section.

d. Select the copied skill from the Active skills section to open it.
   A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the case summarization skill is activated.

4. In the General details step, fill in the fields.
   For information about the inputs and triggers for each skill, see Skill inputs for Now Assist for Telecommunications, Media and Technology (TMT).
   a. Enter a name and description for the skill.
   b. Select **Save and continue** to go to the next step.
5. View the input data for each skill, such as the base input fields and related lists for the different input templates.

   Configure the base input table fields and related lists for the different input templates for the skill.

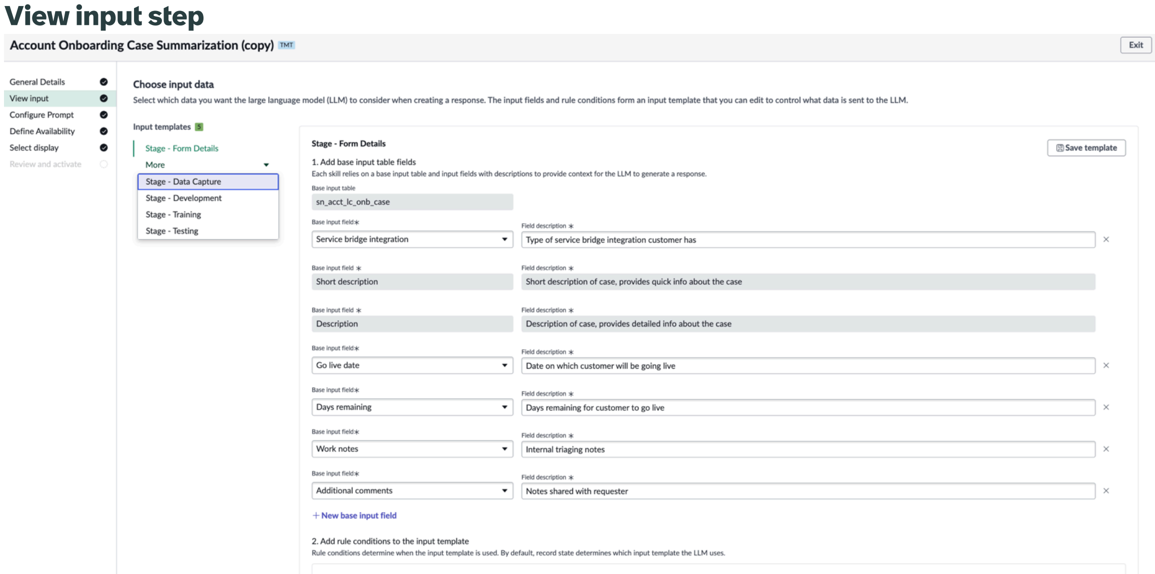
   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   Select only those related tables that are offered as the base system, as part of the input data.

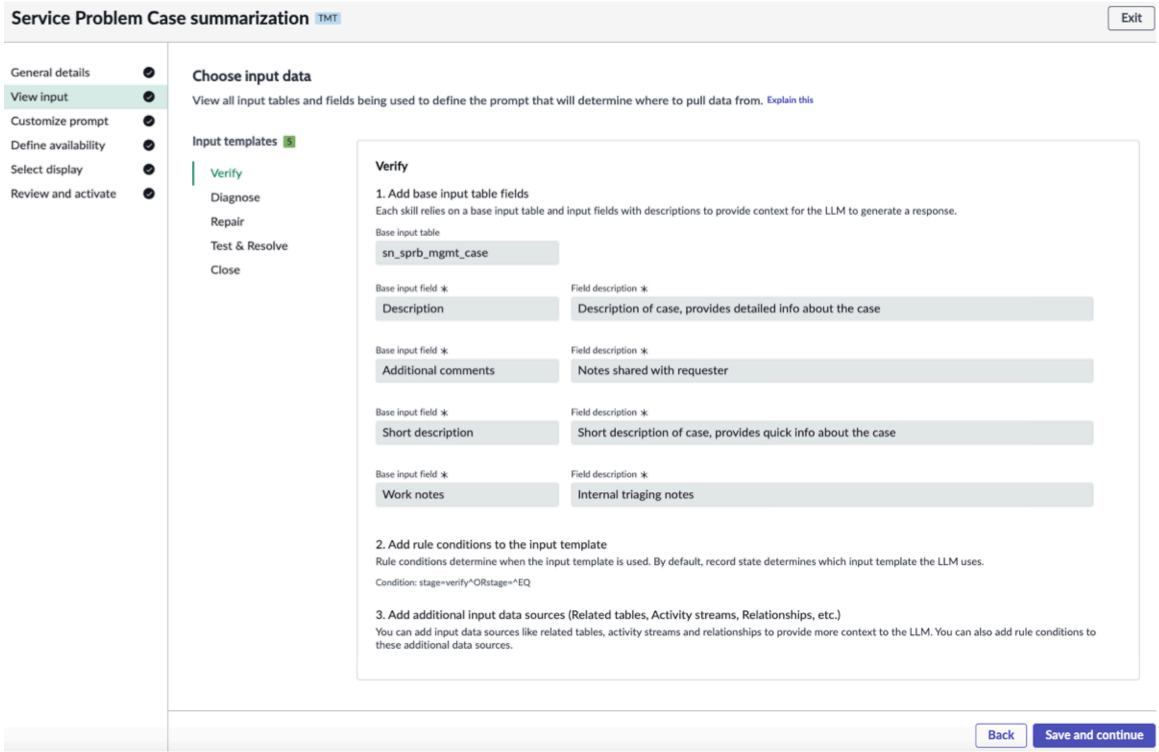
   a. For each input template, select **+New base input field** and configure the base input table fields.

      Add multiple base input fields, as necessary.

View input step



View input step



The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the case table whose value this skill uses in its response. For example, `Short description`.
Field description	Description of the base input field value. For example, `Short description of case, provides quick info about the issue`.

b. For each input template, configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

c. For each input template, select **+New data source** to configure the additional related table and activity stream data, as needed.

Adding input data sources, like the related tables and activity streams, provide more context to the Now LLM Service in a related list.

You can also add the rule conditions to these additional data sources.

d. Select **Save and continue** to go to the next step.

6. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by adding new predefined sections and reordering them, as needed.

a. For each input template, select the prompt sections from the list of available sections to include in the generated summary.

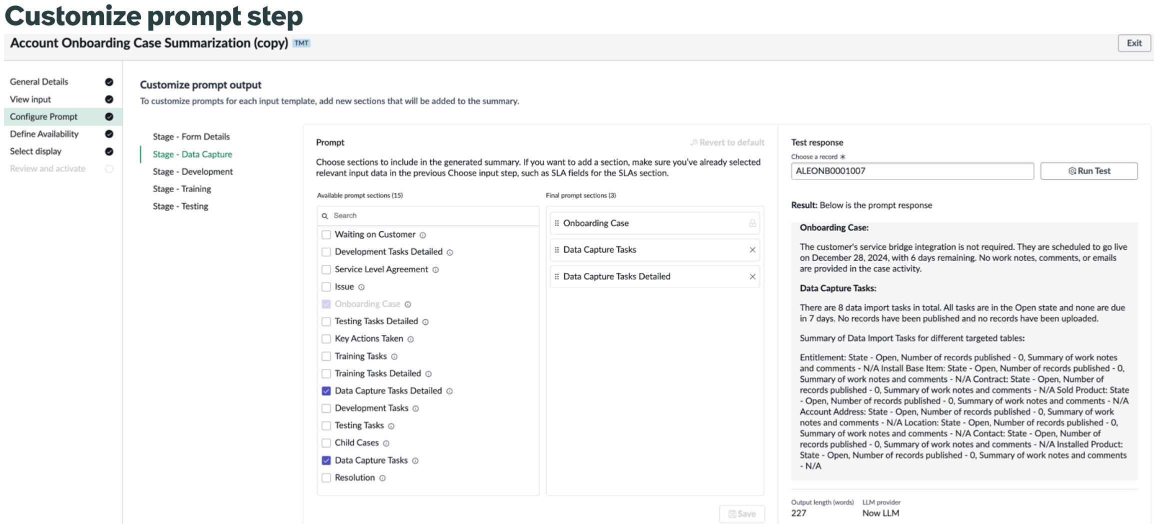
To add a section, you must configure the relevant input data prior to this step.

You can add the **Waiting on customer** prompt to cases only if the case has an **Awaiting info** state. Otherwise, adding this header to other states could cause the Now LLM Service to generate inaccurate or unreliable results.

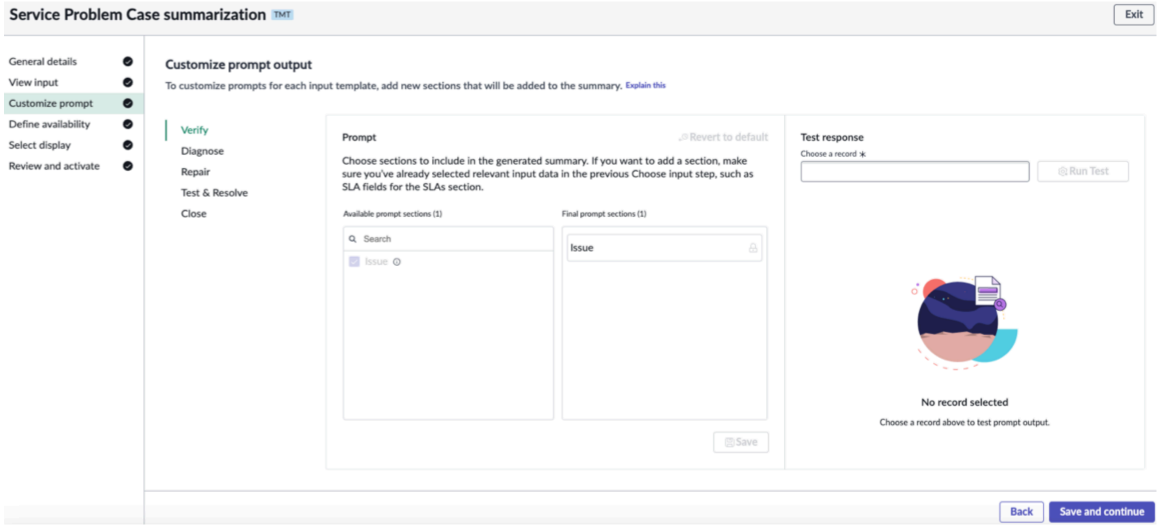
b. Select **Save** to continue to the test response.

c. Select a case record in the Test response section, and test the prompt response output format by selecting **Run Test**.

Customize prompt step



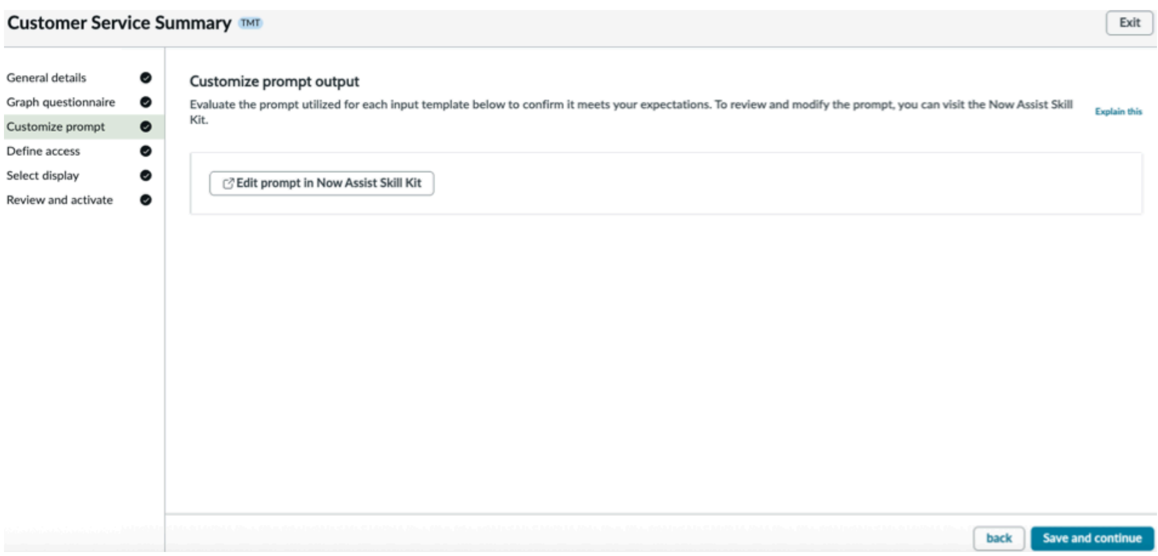
Customize prompt step



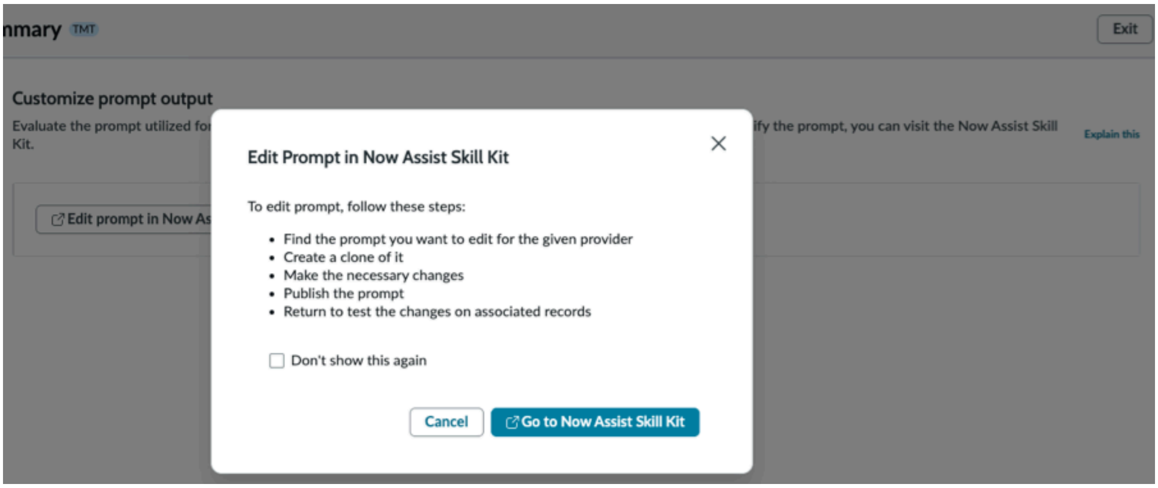
d. Select **Save and continue** to go to the next step.

7. Customize the prompt for customer service summary skill.

Review the prompt for each input template.



a. Select **Edit prompt in Now Assist Skill Kit** to visit Now Assist Skill Kit.



b. Select **Go to Now Assist Skill Kit** to review and modify the prompt.

8. Select **Save and continue** to go to the next step.
9. Define how the skill is available to your users.

   a. Configure the skill to be always available to users, or select conditions that must be met before the skill is available.
   Selecting **Customize skill availability** displays a condition builder to filter the data further.

   b. Select **Save and continue** to go to the next step.

10. Configure where to display the case summarization.

    a. Select either **In-product**, or **Now Assist panel**.

    - **In-product**: When selected, the Now Assist skills are displayed on the forms and workspaces.

      For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

    - **Now Assist panel**: When selected, the Now Assist skills are available in the Now Assist panel.

      If you don't see this option, you must activate the Now Assist panel. For more information, see Activate Now Assist panel standard chat.

      For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

    b. Select **Save and continue** to go to the next step.

11. Review and activate the skill.
    Review your choices and select **Activate** to complete the skill customization.
    You can now select **Summarize** in a case to generate the case summary.

Configuring Service Exchange Now Assist for Telecommunications, Media and Technology (TMT)

Configure the Now Assist for Telecommunications, Media and Technology (TMT) application so that enterprise providers can use the Service Exchange Mapping Assist feature in the Core UI.

Before you begin
Role required: admin

Procedure

1. Install the Now Assist for Telecommunications, Media and Technology (TMT) plugin (sn_tmt_gen_ai).
   - For information about the plugin dependencies and plugin activation order, see Application information.
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Features** and access the **Features** tab of the Now Assist Admin console.
   If you're already in the Now Assist Admin console, you can select the **Now Assist Features** tab on the screen.
3. Select **Customer** and select **TMT** in the Select product drop down list.
4. On the Service Exchange feature card, select **View details**.
5. In the All available Service Exchange skills section, select **Turn on**.
   Your skill is configured and activated. Agents can now automatically generate transform mapping between the provider and consumer fields.

Configure the graph questionnaire Now Assist for Telecommunications, Media and Technology (TMT)

Configure the graph questionnaire to add or modify the new queries to retrieve the knowledge graph data.

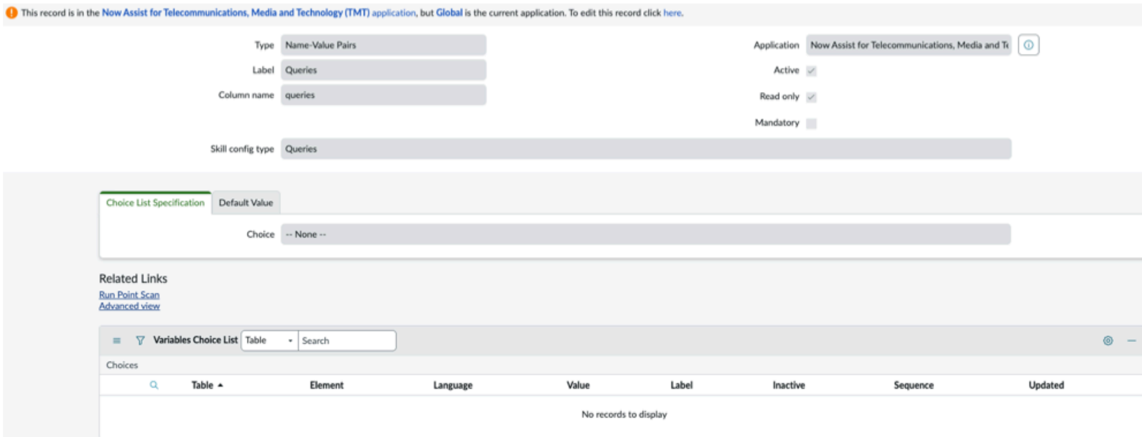
Before you begin
Role required: Admin

Procedure

1. Type `sn_nowassist_skill_config_var.LIST` in the **All** search filter.
2. Press enter.
3. Search for `Queries` in the **Column name**.
4. Open the record.
5. Select **here** if you see the notice that says:

   This record is in the Now Assist for Telecommunications, Media and Technology (TMT) application, but Global is the current application. To edit this record, click **here**.

6. Clear the **Read only** field.



Using agentic workflows in Now Assist for Telecommunications, Media and Technology (TMT)

Use the Now Assist for TMT agentic workflows to complete tasks autonomously.

Available agentic workflows for Now Assist for TMT AI agent collection

Agentic workflow name	Description	Available AI agents
Test and repair telecom service issues	The agentic workflow gets triggered when the service problem case is assigned to the case agent and the state of the case is Open or New. The customer raises a case on the service disruption. The service problem case (SPC) starts with the SPC number. This AI agent is designed to handle the service problem case requests that require troubleshooting, diagnostics, analysis, or resolution for a task (case), when an identifier or description for the task is given. It's also capable of retrieving relevant context and details related to the task given to them. AI agents perform their tasks to resolve the customer issue.	• Service problem manager AI agent • Customer payment status AI agent • Preliminary troubleshooter AI agent • On-demand service tester AI agent • Service repairer AI agent

Available agentic workflows for Now Assist for TMT AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
Help remediate bill issues	The agentic workflow is designed to handle billing inquiry requests by analyzing current invoice usage, providing insights into high bill usage, and suggesting alternative plans based on customer usage patterns. For example, if a customer with a domestic mobile connection uses it internationally, they may incur extra charges; our bill analysis can identify such international usage and provide optimal plan to help manage costs.	• Billing account information collector AI agent • Recommended plans AI agent • Billing invoice data collector AI agent
Analyze network incidents	Assists customer agents in resolving a given incident. It helps customer agents to resolve network tickets by tracking it and creating an actionable task.	• Network ticket resolution AI agent • Ticket readiness AI agent • Network correlation monitor AI agent • Network ticket actionable steps generation AI agent • Network remediation generation AI agent
Analyze risks and recommend solutions	Retrieves applicable risks and proactively suggests solutions with minimal user intervention.	Success risk manager AI agent
Monitor engagement health	Monitors the health score trends for all active engagements and triggers risk signals when declined.	• Success trend AI agent • Success health monitor AI agent
Support renewals and expansion	Assesses engagements due for renewal, analyzes trends, and recommends renewal strategies.	• Renewal analysis AI agent • Value realization assessor AI agent • Success insight AI agent
Trigger risk mitigation touchpoint	Automates the creating and scheduling of meetings for a specific user.	• Meeting draft creator AI agent • Draft meeting scheduler AI agent

Available agentic workflows for Now Assist for TMT AI agent collection (continued)

Agentic workflow name	Description	Available AI agents
Service Exchange onboarding	Assists the provider with the consumer registration process, including step-by-step guidance, error checks during registration, and support for resolving any errors.	• Registration Initiator AI agent • Registration Error Monitor AI agent
Customer voice quality issue resolution	Assists customer service representatives in resolving customer voice quality issues.	• Ticket creation AI agent • Customer interaction context gatherer AI agent • RADCOM ticket handling agent customer profile (External agent)

Enable security implementation to execute AI agents and agentic workflows through access control lists (ACLs) and user identities. ACLs provide the Run As capability to let agents and agentic workflows execute actions either as a dynamic user or as an AI user. For more information, see Implement access control in Now Assist AI agents.

Important:
By default, all agentic workflows and AI agent records are read only.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

Once you duplicate the agentic workflow, adjust the settings according to your requirements. Next, you activate the duplicated agentic workflow. You can also test the agentic workflow to analyze its performance in the AI Agent Studio, while it executes the instructions that you defined.

Looking for an AI agent?

- There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available on your instance, see Find AI agents.
- To find agents that might not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

Customer Service Problem Management agentic workflows

The Customer Service Problem Management agentic workflows are used to resolve broadband, internet issues, and incidents, helping customer agents to resolve network tickets by tracking them and creating an actionable task, and handle the billing inquiry case requests.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection test and repair telecom service issues agentic workflow

Use the Test and repair telecom service issues agentic workflow to resolve broadband and internet issues.

Test and repair telecom service issues overview

Resolve the customer issues using a team of AI agents in the Test and repair telecom service issues agentic workflow. It can handle task requests that require troubleshooting, diagnostics, analysis, or resolution for a task (case), whether an identifier or description for the task is given.

The Test and repair telecom service issues agentic workflow supports these tables:

- Incident
- Change request
- Domain order
- Order task
- Service problem case

To modify the Test and repair telecom service issues agentic workflow Duplicate an agentic workflow, and adjust the settings according to your requirements.

> **Important:**
> In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.test_and_repair_telecom_service_ai_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Test and repair telecom service issues agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Test and repair telecom service issues**.

To create a new agentic workflow, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Test and repair telecom service issues agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Service problem manager AI agent	An AI agent is responsible for planning, orchestrating, and delegating work to other agents. Checks the customer inventory status. Shows the Knowledge articles.
Payment status checker AI agent	Checks for outstanding bill payments.
Preliminary troubleshooter AI agent	AI agent designed to ask questions that are fetched from the structured question generator. Activate the structured question generator skill to generate the questions from the skill. Check for similar cases for the resolution plan and asks questions from Knowledge Base articles to determine the resolution.
On-demand service tester AI agent	Create a diagnostic task based on the inventory specifications for a Service problem case and execute a test definition.
Service repairer AI agent	Create the repair task for the test runs.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection Help remediate bill issues agentic workflow

Use the Help remediate bill issues agentic workflow to handle the billing inquiry case requests and recommend better plans based on the customer usage.

Help remediate bill issues agentic workflow overview

The Help remediate bill issue agentic workflow uses a team of AI agents that support the resolution of customer issues. It can handle task requests to retrieve the account details, current invoices, and past invoices. It analyzes the data to identify reasons for high bill usage and recommends better plans based on customer usage patterns.

To modify the Help remediate bill issues agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

> **Important:**
> In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.telco_billing_inquiry_case_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Help remediate bill issues agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Help remediate bill issues**.

To create a new use case, see Create an agentic workflow.

Application dependency

The Help remediate bill issues agentic workflow has the following dependencies:

- Case Management for Invoice operations (com.sn_csm_invoice)
- Product offering recommendations

To configure the spoke selector, see Configure the spoke selector for external systems.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the agentic workflow, see Manually test the execution of an agentic workflow.

AI agents used in the Help remediate bill issues agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Billing account information collector AI agent	This AI agent is designed to handle billing inquiries by following a structured approach. It retrieves the billing inquiry case details and obtains the billing account details using the account number. The agent is intended for use by ServiceNow agents for getting the billing account number.
Recommended plans AI agent	This AI agent is designed to facilitate the generation and confirmation of service plan

AI agent	AI agent role
	recommendations through a structured approach. It follows these instructions: 1. Generates a recommended plan. 2. Shows the recommended plan to the user for confirmation. 3. Verifies whether an email is associated with the customer account. 4. Triggers the email notification agent to send the recommended plan details to the user.
Billing invoice data collector AI agent	This AI agent collects the billing invoice data like account details, invoice history, and invoice details.

Configure the spoke selector for external systems

Configure the spoke selector for Aria to enable the configuration and execution of billing requests.

Before you begin

Role required: admin

About this task

The spoke selector application provides a common framework that enables the configuration and execution of integration requests. It operates by selecting the matching implementations based on the configured input parameters for each request.

Procedure

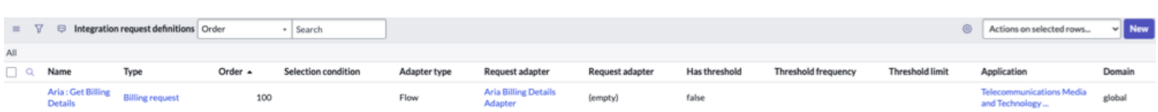
1. Navigate to **All** > **Spoke selector** > **Request type**.
2. Select **Billing request**.

   The billing request is configured with a request definition that invokes Aria APIs. This demo implementation serves as a reference for configuring a new request definition that retrieves billing-related data from third party systems.

3. Create the Integration request definitions.

   By giving an appropriate value for **Order** or by defining the **Selection condition** the new request definition that fetches the billing-related data is triggered.

4. To create Integration request definitions, navigate to **All** > **Spoke selector** > **Request definition**.
5. In the Integration request definitions screen, select **New** in the header section.



6. On the form, fill in the fields.

Integration request type form

Field	Description
Name	Name of the integration request type.
Type	Billing request selection is made as the integration request type.
Description	Brief description of the request definition.
Order	Request definition is executed in the least order value.
Adapter type	Flow
Request adapter	Name of the Flow configured to fetch the records for the respective configuration type. **Note:** The sys_hub_flow record with the correct flow inputs, flow outputs, and flow snapshots.
Application	Store application details.
Domain	Global
Condition	Condition to trigger the request adapter.

The following parameters must be included in the request for the Get Account Details Request for Aria API request adapter:

```
{"api_name":"get_acct_details","request_body":{"client_acct_id"
:"FT0010001"}}
```

The following parameters must be included in the response for the Get Account Details Response for Aria API request adapter:

```
{"status_code":"1","status_reason":"","response_body":{"master_
plan_info_list":{"48477095":"Business Internet +
           Cellphone PI0001061"},"company_name":"Flash
 Telecom","acct_no":"27045400"}}
```

The following parameters must be included in the request for the Get Invoice History Request for Aria API request adapter:

```
{"api_name":"get_invoice_history","request_body":{"acct_no":"27
045400"}}
```

The following parameters must be included in the response for the Get Invoice History Response for Aria API request adapter:

```
{"status_code":"1","status_reason":"","response_body":{"invoice
s":
[{"amount":135.7,"invoice_no":254547358,"due_date":"2024-11-
30","outstanding_amount":135.7,"usage_bill_from":"2024-10-01","
usage_bill_thru":"2024-10-31"},
{"amount":190.26,"invoice_no":254547359,"due_date":"2024-12-
```

```
31","outstanding_amount":190.26,"usage_bill_from":"2024-11-01",
"usage_bill_thru":"2024-11-30"},
{"amount":172.95,"invoice_no":254547360,"due_date":"2025-01-
31","outstanding_amount":172.95,"usage_bill_from":"2024-12-01",
"usage_bill_thru":"2024-12-31"},
{"amount":437.07,"invoice_no":254547361,"due_date":"2025-02-
28","outstanding_amount":0,"usage_bill_from":"2025-01-01","usag
e_bill_thru":"2025-01-31"}]}}
```


The following parameters must be included in the request for the Get Invoice Details Request for Aria API request adapter:


```
{"api_name":"get_invoice_details","request_body":{"acct_no":"27
045400","invoice_no":"254547361"}}
```


The following parameters must be included in the response for the Get Invoice Details Response for Aria API request adapter:


```
{"status_code":"1","status_reason":"","response_body":{"line_it
ems":
[{"usage_type_no":10058138,"amount":0,"service_name":"Mobile
 Data
GB","sold_product_number":"PI0001065","service_no":11196572,"de
scription":"Mobile Data GB (10 gigabytes @
$0)"},{"usage_type_no":10058138,"amount":14.35,"service_name":"
Mobile Data
GB","sold_product_number":"PI0001065","service_no":11196572,"de
scription":"Mobile Data GB (18.847 gigabytes
@
 $1)"},{"usage_type_no":10058140,"amount":255.73,"service_name"
:"International Roaming Calls from
EU","sold_product_number":"PI0001065","service_no":11197966,"de
scription":"International Roaming Calls from
EU (93 minutes @
 $2.75)"},{"usage_type_no":10058144,"amount":0.5,"service_name"
:"Domestic
Minutes","sold_product_number":"PI0001065","service_no":1119656
8,"description":"Domestic Minutes (9.91
minutes @
 $.05)"},{"usage_type_no":10058146,"amount":11.75,"service_name
":"International Calls to
Asia","sold_product_number":"PI0001065","service_no":11196570,"
description":"International Calls to Asia (6.56
minutes @ $1.79)"}]}}
```


7. Select **Save**.

Result

Once the condition is set and the request condition matched, the defined flow executes and the records for the configuration are fetched from the external provider that you selected, into your ServiceNow instance.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection analyze network incidents agentic workflow

Use the Analyze network incidents agentic workflow to resolve incidents, helping customer agents to resolve network tickets by tracking them and creating an actionable task.

Analyze network incidents agentic workflow overview

Resolve the customer issues using a team of AI agents in the Analyze network incidents agentic workflow. It assists the customer agents in resolving a given incident.

To modify the Analyze network incidents agentic workflow, Duplicate an agentic workflow, and adjust the settings according to your requirements.

Note:
You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Important:
In the Edit trigger form, make sure that the **Active** button is turned on to enable the AI agent to trigger autonomously.

Role masking

Required role: sn_tmt_agentic_ai.sn_noc_incident_user

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Application dependency

The Analyze network incidents agentic workflow has the following plugin dependencies:

- Customer service with service management (sn_cs_sm)
- Customer service (sn_customerservice)
- Customer service problem management
- Telecommunications alarm management open API (sn_ind_tmf642)
- Field service management for telecommunications (sn_fsmt)
- Major issue management

Analyze network incidents agentic workflow

To access the use case:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Analyze network incidents**.

To create a new use case, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test use cases**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Analyze network incidents agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agent	AI agent role
Network ticket resolution AI agent	AI agent capable of providing overall incident and alert summary. It's also capable of searching the knowledge base for relevant articles to provide resolutions if available.
Ticket readiness AI agent	AI agent capable of predicting the incident fields like category, subcategory, priority, description, short description, and estimated time to resolve the incident using GAF on historic incident data. To activate the GAF, see Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT).
Network correlation monitor AI agent	AI agent capable of identifying the impacted accounts and services and correlating cases opened in the last 15 minutes that could be impacted because of the incident, provide the list to the customers for review, and associate it to the incident. It's also capable of notifying customers about the outages based on human confirmation by creating service problem cases and linking child cases if any.
Network ticket actionable steps generation AI agent	AI agent capable of generating actionable resolution steps for incoming incident using the Group Action Framework (GAF) and modifies the steps according to the human feedback. To activate the GAF, see Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT).
Network remediation generation AI agent	AI agent capable of consuming resolution steps for an incident and converting them to one of the following task types:

AI agent	AI agent role
	• Incident Task • Work Order • Change Request

Activate Group Action Framework for Now Assist for Telecommunications, Media and Technology (TMT)

Activate Group Action Framework (GAF) to enable Now Assist AI agents to collect information about the related records across your instance.

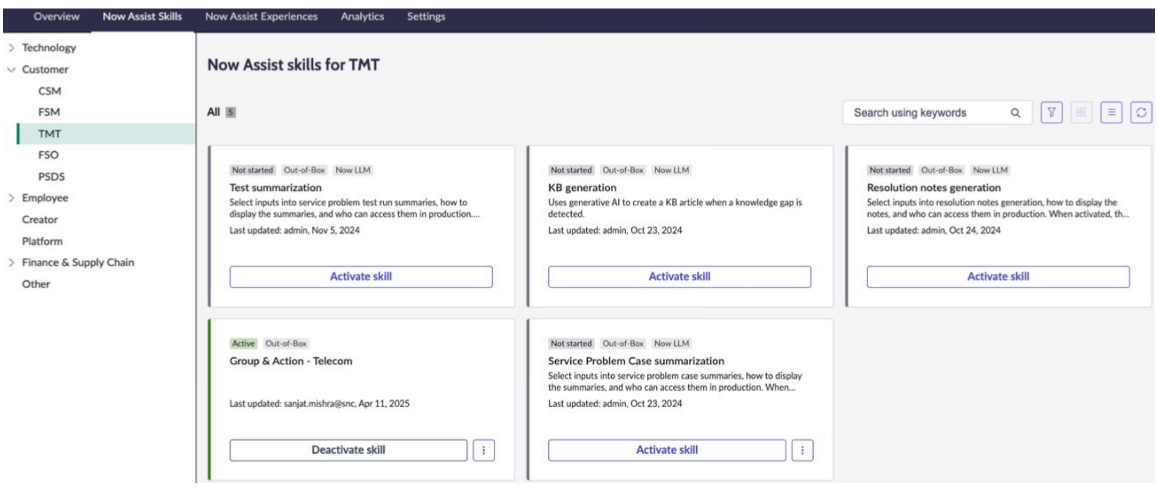
Before you begin

The scope must be a Telecommunications, Media, and Technology AI agent collection.

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills** > **Customer** > **TMT**.
2. In Group & Action - Telecom, select **Activate skill**.



3. **Optional:** On the form, select **Edit** to change the values.
4. Select **Save and continue**.
5. On the **Review and activate** tab, select **Done**.

Result

GAF is activated on your instance for the Now Assist application and can be used by AI agents to find related records.

Now Assist for Telecommunications, Media and Technology (TMT) Customer voice quality issue resolution agentic workflow

Use this agentic workflow to resolve customer voice quality issues.

Customer voice quality issue resolution agentic workflow overview

This agentic workflow gathers customer information, collects the subscriber experience profile from RADCOM, and creates a service problem case. By integrating RADCOM's AI agents with ServiceNow AI agents, wireless providers can link subscriber details with key service performance metrics. This integration enables swift resolution of service issues and reduces churn rates.

This agentic workflow is triggered when a new interaction is created in the CSM Interaction record under the following conditions:

- Type: Phone or Chat
- Category: Network

Note:
The Customer voice quality issue resolution agentic workflow is available in read-only mode. Before using the workflow, you must make a copy and adjust the settings according to your requirements. See Duplicate an agentic workflow for details.

Role masking

Required role: sn_sprb_mgmt.agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Application dependency

The Customer voice quality issue resolution agentic workflow has the following dependencies:

- Customer Service (sn_customerservice)
- Customer Service Problem Management z(sn_sprb_mgmt)

Configure the Customer voice quality issue resolution agentic workflow

This agentic workflow requires a third-party agent, the RADCOM ticket handling agent, to retrieve the customer experience profile. To use the third-party agent, you must create an external agent by following the steps listed in the Create an external AI agent with manual integration section.

Test the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Customer voice quality issue resolution**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Customer voice quality issue resolution agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

AI agents and their role in the Customer voice quality issue resolution agentic workflow

AI agent	AI agent role
Customer interaction context gatherer AI agent	• Retrieves and analyzes customer interaction data. • Provides detailed contextual information regarding customer communication patterns, product usage history, and relevant troubleshooting information.
RADCOM ticket handling AI agent (external agent)	Retrieves subscriber profile including network usage patterns, service quality metrics, and customer behavior insights.
Ticket creation AI agent	• Identifies duplicate records, determines case type, and verifies documents. • Checks existing cases and creates a new case.

Customer success agentic workflows

The customer success health and risk agentic workflows are used to collect health data, monitor the health score, analyze risks, and provide potential solutions.

The customer success health and risk agentic workflows do the following:

- Collect health metric information for engagements.
- Analyze the metric data and identify trends (improving, declining, or flat).
- Create risk signals or risk occurrences if a declining trend is identified.
- Retrieve potential solutions and notify customer success manager of any unaddressed risk signals.
- Summarize results based on inputs provided by the customer success manager.

- For more details on collecting health metrics and identifying trends, see Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow.
- For more details on analyzing risks and recommending solutions, see Now Assist for Telecommunications, Media and Technology (TMT) Recommend risk signal solutions agentic workflow.

Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow

Use the Monitor engagement health agentic workflow to monitor the health score of engagements and their associated metric data trends, and generate risk signals when a decline is detected.

> **Important:**
> Before you run this agentic workflow, you must activate the Analyze metric data trend skill to collect the metric data that is to be evaluated.

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Monitor engagement health agentic workflow overview

Customer success managers can monitor the health score of up to 10 active engagements and summarize the health trend for the past 6 weeks. Each metric used to calculate the health score is monitored, and if a declining pattern is detected, a risk signal or a risk occurrence (for an existing risk signal) is generated. A summary indicating the number of risk signals created and the health score range is generated. The Monitor engagement health agentic workflow is triggered weekly based on a predefined schedule and the results are displayed in the Now Assist panel.

You can view the risk signals and occurrences that have been created by navigating to the Risk signals page. For risks created using the agentic workflow, the following field values are displayed:

- Category: Health declined
- Creation method: AI generated

Role masking

Required role: sn_acct_lc.customer_success_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Configure the monitor engagement health agentic workflow

- To run the agentic workflow as a scheduled job, you must activate the Monitor engagement health flow. See Activate a flow for details.
- The agentic workflow monitors only the engagements for which **AI Health Monitor** flag has been enabled. Each customer success manager can enable a maximum of 10 engagements. For instructions on enabling this flag, see Create an engagement.
- By default, the health score of each individual metric is monitored. If you want to monitor only the overall health score across all engagements, you need to update the *sn_cust_succ_ai_agent_enable_health_monitor_metrics* system property by following these steps:
  - Navigate to **All** and enter *sys_properties.LIST* in the search field.
  - Select the *sn_cust_succ_ai_agent_enable_health_monitor_metrics* property.
  - Set the Value field to **false**. When this property is disabled, the agentic workflow will monitor the overall health score instead of the individual metrics.
- For any new or existing health definitions, you must specify the **Context** for the **Data source** to indicate how the color banding range will be applied. Based on the **Context**, you can define different color banding ranges that can be used for the health score. For example, you can configure different values for the same **Data source** as follows:
  - **Data source 1**
    - Data source: Daily collection of NPS
    - Context: Health Metric Configuration: Daily collection of NPS (Global)
    - Min: 80

        - Max: 100
        - Color: Green
        - Category: Good
    - **Data source 2**
        - Data source: Daily collection of NPS
        - Context: Daily collection of NPS for (Customer X)
        - Min: 0
        - Max: 60
        - Color: Red
        - Category: Poor

    For more details on configuring the color banding table, see Setup the color banding table.

AI agents used in the Monitor engagement health agentic workflow

The Monitor engagement health agentic workflow uses specific AI agents to monitor the engagements, analyze the health trend, and generate a health score.

AI agents and their role in the Monitor engagement health agentic workflow

AI agent	AI agent role
Success health monitor AI agent	Retrieves data for all active engagements, identifies trends, and creates a risk signal if a declining pattern is detected.

Now Assist for Telecommunications, Media and Technology (TMT) Recommend risk signal solutions agentic workflow

Use the Recommend risk signal solutions agentic workflow to monitor and mitigate risks in customer engagements with minimal user intervention.

Recommend risk signal solutions agentic workflow overview

Use the Recommend risk signal solutions agentic workflow to:

- Monitor engagements and retrieve all applicable risks.
- Provide real-time risk analysis and generate detailed reports.
- Identify common solutions and provide proactive recommendations.

Customer success managers can collaborate with customer success squad members to monitor risks, perform real-time risk analysis, generate detailed reports with proactive recommendations. This helps prevent escalations, improve customer retention, and enhance service quality. The Recommend risk signal solutions agentic workflow can be used to assess and offer solutions for both individual and multiple risks. It is triggered daily based on a predefined schedule and the results are displayed in the Now Assist panel.

For information on how risks are generated, see Setup the engagement risk definition.

Role masking

Required role: sn_acct_lc.customer_success_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Configure the Recommend risk signal solutions agentic workflow

Before you use the agentic workflow, do the following:

- Activate the Recommend risk signal solutions subflow to trigger the agentic workflow to run as a daily scheduled job. See Activate a flow for details.
- Configure the risk category and other conditions as required in the Engagement risk solutions decision table. See Using decision tables.
- Ensure that the solution subflows contain the following mandatory inputs:
  - Risk system ID: Type is string and default name is risk_system_id.
  - Solution table: Type is table.
  - Solution ID: Type is sys_id.

Optionally, you can define additional non-mandatory inputs. These can be used in subflow steps or to override default values.

Note:
To enable the display of the Recommend risk signal solutions agentic workflow, you must activate the AI Agents for Customer Success Management plugin (com.sn_cust_succ_ai_agent).

AI agents used in the Recommend risk signal solutions agentic workflow

The Recommend risk signal solutions agentic workflow uses specific AI agents to retrieve all unaddressed risks and recommend solutions.

AI agents and their role in the Recommend risk signal solutions agentic workflow

AI agent	AI agent role
Success risk solution AI agent	Retrieves unaddressed risks for the current user, groups them, and provides solutions for each risk or group of risks.

Now Assist for Telecommunications, Media and Technology (TMT) AI agent collection trigger risk mitigation touchpoint

Use the Trigger risk mitigation touchpoint agentic workflow to schedule and edit a touchpoint meeting for a specific user.

Trigger risk mitigation touchpoint agentic workflow overview

The agentic workflow enables customer success agents to optimize meeting schedules within the customer success workflow by creating and managing meetings. It create and manage meetings based on key details such as invitees, agenda, meeting type, and scheduling preferences. With this agentic workflow, customer success managers can:

- Take timely and contextual action.
- Create a meeting with all required details.
- Schedule draft meetings without manual coordination.

In the Trigger risk mitigation touchpoint agentic workflow, when the risk record's probability is very high or occurred, the customer success agent is assigned to that risk receives a Now Assist panel notification. From the risk record, the agentic workflow automates the creation of meeting and schedules the meeting.

To modify the Trigger risk mitigation touchpoint agentic workflow Duplicate an agentic workflow, and adjust the settings according to your requirements.

Note:
You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Role masking

Required role: sn_acct_lc.customer_success_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Trigger risk mitigation touchpoint agentic workflow

This workflow does the following:

Note:
Before running the workflow, you must configure the generic prompt as follows:

1. Navigate to the OneExtend Capability (sys_one_extend_capability) table by entering `sys_one_extend_capability.list` in the navigator.
2. Search for `generic prompt` and open the record.
3. In OneExtend Capability Attributes related list, set the **Default** to **True** for any of these definitions:
    - Generic Prompt (Azure OpenAI Chat)
    - Generic Prompt (Now LLM Service)
    - Generic Prompt Vertex AI (Google Cloud Chat Completion)
    - Generic Prompt (Amazon Bedrock Chat Completions)

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Trigger risk mitigation touchpoint**.

To create an agentic workflow, see Create an agentic workflow.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test AI reasoning**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents used in the Trigger risk mitigation touchpoint agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

To create an AI agent, see Create an AI agent.

AI agents and their role in the Trigger risk mitigation touchpoint agentic workflow

AI agent	AI agent role
Meeting draft creator AI agent	AI agent automates draft creation of meetings using context and history of the risk record. **Note:** The AI agent creates meeting inside a touchpoint.
Draft meeting scheduler AI agent	AI agent automates virtual meeting scheduling by collecting invite and details provided from the customer success agent.

Now Assist for Telecommunications, Media and Technology (TMT) Support renewals and expansion

Assess contracts due for renewal, analyze trends, and recommend renewal strategies.

Support renewals and expansion agentic workflow overview

The Support renewals and expansion agentic workflow enables customer success agents to assess the health, value, and product adoption of a contract. It provides data driven insights and renewal play recommendations and enables customer success agents to manage multiple customer engagements efficiently. Customer success managers can use the Support renewals and expansion agentic workflow to:

- Track how much value has been delivered since onboarding.
- Measure progress against goals and service delivery metrics.
- Retrieve and calculate health and adoption scores.
- Analyze trends to support informed adoption decisions.

Note:
The Support renewals and expansion agentic workflow is available in read-only mode. Before using the workflow, you must make a copy and adjust the settings according to your requirements. See Duplicate an agentic workflow for details.

Role masking

Required role: sn_acct_lc.customer_success_agent

Role masking enables users to limit the roles and privileges of agentic workflows during tool execution. Agentic workflows and their AI agents that get installed with Now Assist applications are assigned pre-defined roles. If you select `Users with specific roles` for user access, you must configure the security controls to include these roles. Data access settings must also include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

Configure the Support renewals and expansion agentic workflow

Before you use the agentic workflow, you must configure the following fields in the Renewal analysis AI agent:

- Engagement adoption source sysID
- Contract adoption source sysID
- Health source sysID
- Time period (in days)
- Metric aggregation type

Note:
The source sysIDs must be configured correctly in the Data Context Engine as follows:

- Health: Source and context table must be set to Engagement.
- Engagement: Source table must be set to Sold Products and the context table must be set to Engagement.
- Contract: Source table must be set to Sold Products and the context table must be set to Contract.

For more details on configuring the data sources, see Setup the data context engine.

Support renewals and expansion agentic workflow

Note:
Before running the workflow, you must configure the generic prompt as follows:

1. Navigate to the OneExtend Capability (sys_one_extend_capability) table by entering `sys_one_extend_capability.list` in the navigator.
2. Search for `generic prompt` and open the record.
3. In OneExtend Capability Attributes related list, set the **Default** to **True** for any of these definitions:
    - Generic Prompt (Azure OpenAI Chat)
    - Generic Prompt (Now LLM)
    - Generic Prompt Vertex AI (Google Cloud Chat Completion)
    - Generic Prompt (Amazon Bedrock Chat Completions)

When a contract is due to expire in 90 days, the customer success manager receives a notification and the Support renewals and expansion workflow is automatically triggered. The contract health, value, and usage scans are initiated and the customer success manager can monitor the progress in the Now Assist panel.

When the workflow is completed, two reports are generated for the engagement and the associated contract (that is due to expire in 90 days) with the following details:

- Renewal likelihood
- Expansion potential
- Recommended actions
- Adoption trend
- Health trend (this is available only for engagements)
- Value score

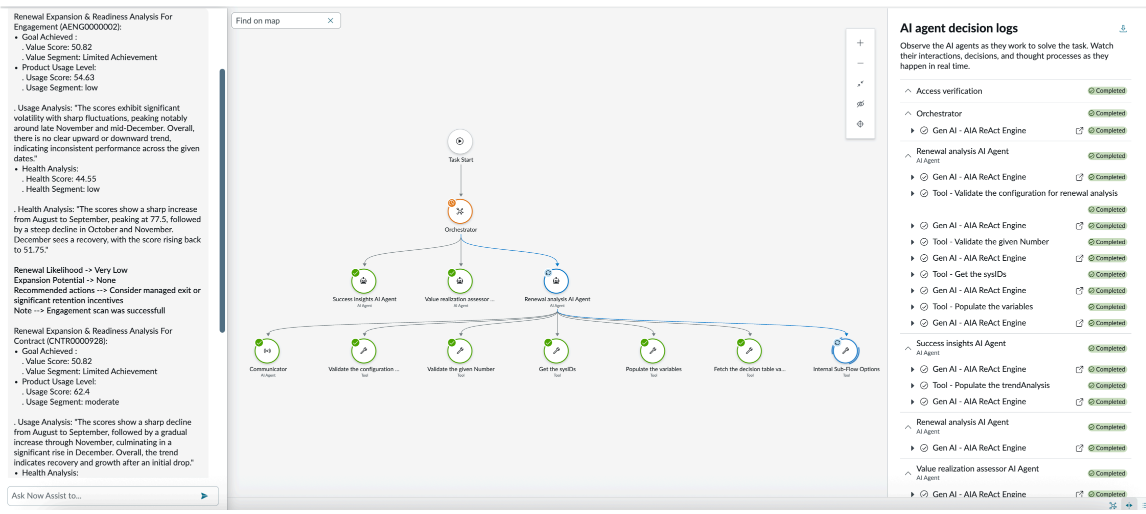
You can then select the appropriate renewal play based on the report.

Testing the agentic workflow

To access the use case testing page:

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. Follow the instructions in the Manually test the execution of an agentic workflow section to test the agentic workflow.

Example of Support renewals and expansion agentic workflow output in the *ServiceNow*



AI agents used in the Support renewals and expansion agentic workflow

The following AI agents are used to execute the instructions for the agentic workflow.

AI agents and their role in the Support renewals and expansion agentic workflow

AI agent	AI agent role
Renewal analysis AI agent	Analyzes renewal possibilities and triggers appropriate renewal flows based on assessment results.
Value realization assessor AI agent	Analyzes value realized by tracking service metrics and customer goal achievement over time.
Success insight AI agent	Populates score data and delivers trend analysis to support informed decisions.

Service Exchange onboarding agentic workflows

Use the Service Exchange onboarding agentic workflow to register your consumers in Service Exchange.

Service Exchange onboarding agentic workflow overview

The Service Exchange onboarding agentic workflow helps providers register a consumer user in Service Exchange. It also helps identify any issues during consumer registration and helps you resolve those problems.

To modify the Service Exchange onboarding agentic workflow, you must duplicate the workflow and adjust the settings according to your requirements. For more information, see Duplicate an agentic workflow.

You can initiate the onboarding workflow from the Now Assist panel by entering the prompt `start onboarding`. For more information on the Now Assist panel, see Now Assist panel.

Access the Service Exchange onboarding agentic workflow

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select *`Service Exchange`* **Onboarding**.

To create an agentic workflow, see Create an agentic workflow.

Test the Service Exchange onboarding agentic workflow

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. On the Overview page, select **Test AI reasoning**.
3. Select the agentic workflow and version, and select **Start test**.

To test the use case, see Manually test the execution of an agentic workflow.

AI agents and their role in the Service Exchange onboarding agentic workflow

The following AI agents are used to execute the instructions for the Service Exchange onboarding agentic workflow.

To create an AI agent, see Create an AI agent.

AI agents and their role in Service Exchange onboarding agentic workflow

AI agent	AI agent role
Registration Initiator	This AI agent assists in initiating the registration process and managing the early stages of the process.
Registration Error Monitor	This AI agent assists users with a summary of the Service Exchange errors, enabling them to make informed decisions and take the appropriate actions.

Using Now Assist for Telecommunications, Media and Technology (TMT)

If you have an agent role, you can summarize the service problem case details, generate the case resolution notes, summarize the tests, account onboarding case details, and engagement and touchpoint details with the Now Assist for TMT application.

Service Problem Case

- Summarize the service problem case details to understand the case context quicker, update the summary to include the latest case developments, and post it to the service problem case work notes. These summaries are useful for long-running or complex service problem cases that include multiple conversations between agents and customers.
- Generate the service problem case resolution notes to help wrap up the cases faster. When you're ready to propose a solution to a customer, this feature can generate resolution notes and add them to the Service Problem Case form. The resolution notes also provide the context about the service problem case resolution to other agents who might encounter similar issues.
- Summarize the tests that executed by the agent to diagnose the service problem case to understand the problem and its possible solution. These summaries are useful for long-running or complex service problem cases that include multiple test runs.
- Knowledge generation can help an agent to streamline content creation. An agent can automatically generate knowledge articles by using the relevant data from the case record after proposing a resolution or closing the case. By not having to generate knowledge articles manually, this feature can save your agents valuable time and effort.
- Summarize the tests that executed by the agent to diagnose the technology product case to understand the problem and its possible solution. These summaries are useful for long-running or complex technology product cases that include multiple test runs.

Account onboarding case

Summarize the account onboarding case, including details about each stage in the account boarding lifecycle. Agents can quickly get up to speed on the status of the onboarding case and case tasks with a high-level summary of key points of information.

Customer success

- Summarize the details of an engagement including risks, initiatives, outcomes, cases, and internal plays. Agents can quickly get up to speed on all activities and the overall engagement with a high-level summary of the key points of information such as the status, go-live date, renewal date, worknotes, and any outstanding actions.
- Summarize the different touchpoints in the engagement lifecycle including the meeting agenda, meeting type, and emails. Agents can get a quick summary of all meetings and emails exchanged between the different stakeholders and any follow up activities.

Summarize a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields that you selected on the service problem case record. Quickly understand the case context by using the service problem case summarization skill in the Now Assist for TMT application.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The service problem case summarization skill provides you with a concise summary of a service problem case, including the issue, actions taken, and resolution details. With this skill, you can do the following tasks:

- Generate an initial summary of a service problem case so that you can understand the service problem case context.
- Summarize all the work that has been done on a service problem case.

The service problem case summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Service Problem Case summary by Now Assist component to generate a summary. This component appears below the Case highlights card.
- In Core UI, you select the **Summarize** button on the service problem case record to generate a summary.

The service problem case summarization skill checks the service problem case record to determine if there is enough information available to create a summary:

- When an agent opens the service problem case record
- When an agent refreshes the service problem case record page

If there is enough data, the Service Problem Case summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

> **Note:**
> The service problem case summarization skill requires a minimum 50 words in the case record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the Service Problem Case summary by Now Assist component, select **Summarize**.
   The Service Problem Case summary by Now Assist component appears below the Case highlights card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   > **Note:**
   > Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing a service problem case, manage the results.

Generate the resolution notes for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the resolution notes for a service problem case by using the resolution notes generation skill in the Now Assist for TMT application.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

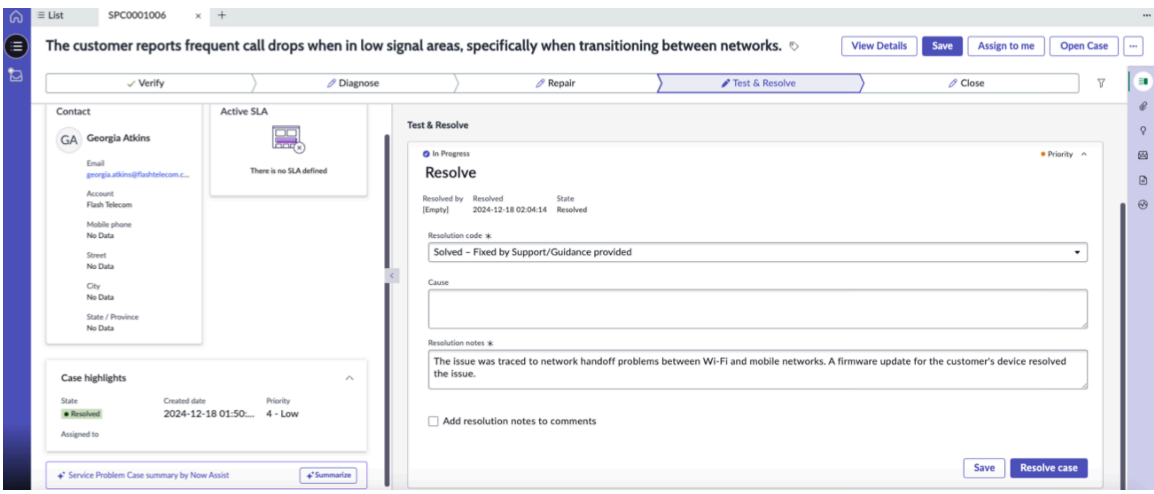
You can also propose the resolution to the customer, and then add the resolution information to the service problem case record. Generating resolution notes may help you wrap up cases faster and provide information about the service problem case resolution to other agents who might encounter similar issues.

You can also generate resolution information on demand from the Now Assist panel.

Note:
The resolution notes generation skill requires a minimum of 50 words in the service problem case record to generate the resolution notes.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. Select **Test & Resolve** > **Resolve**.
4. Navigate to the Resolution notes field in the resolve activity.



5. Select the Now Assist icon.
   Now Assist icon generates a recommended text that is based on the context of the case.
6. Select **Insert** to add the generated content into the resolution notes field.
7. **Optional:** Review the generated content and select **Refine** to modify the content.
   You get the option to either elaborate or shorten the content as needed.
8. **Optional:** If you want to add the resolution information to the service problem case activity stream, select the **Add resolution notes to comments** check box.
   Selecting this check box makes the resolution notes available to anyone who can view the service problem case activity stream.
9. Select **Save**.

Result

- The system populates the fields in the Closure Information section of the case record with the information from the Generate Resolution Notes modal.
- The case moves to the Resolved state.
- The resolution is proposed to the customer.

Generate a knowledge article for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the knowledge articles for resolved and closed cases within the CSM Configurable Workspace and classic environment with Now Assist.

Before you begin

To generate a knowledge article for a case, the case must be in the resolved and closed state, and must not already have a knowledge article linked to it.

Install the Knowledge Management Advanced plugin to use the Knowledge Centered Service (KCS) template when you're generating knowledge articles. For more information, see Activate the Knowledge Management Advanced plugin.

Make sure that your administrator enables Now Assist experience on the Create Article page to ensure that the following knowledge base generation criteria is configured:

- The knowledge skills are installed.
- In the Now Assist Admin console, ensure that the following criteria are in place:
  - Specify the table record and input fields.
  - Specify the conditions for the skill availability from the list of attributes.
  - Display the knowledge base generation feature In-product and specify the Now Assist panel.
- Configure **Create Article** to apply the supported template; For example, Standard and KCS article HTML.
- Currently, only the Create Article experience is available.

Role required: agent

About this task

In CSM Configurable Workspace and classic environment, you can generate the knowledge article information for a case by selecting **Create Knowledge** on the case record. This UI action displays the Use AI to draft this article modal. By using this modal, you can choose to write the article yourself or draft an article with Now Assist and review and edit the knowledge article text.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Open a case that is assigned to you.
   The case record status should be either resolved or closed.
3. Create the article by selecting **Create Knowledge** from the UI actions for the case record.

   Note:

   The **Create Knowledge** UI action is only visible when a case doesn't have an existing knowledge article that is associated with it.

4. In the Create article modal, select a knowledge base and an Article template, if displayed.

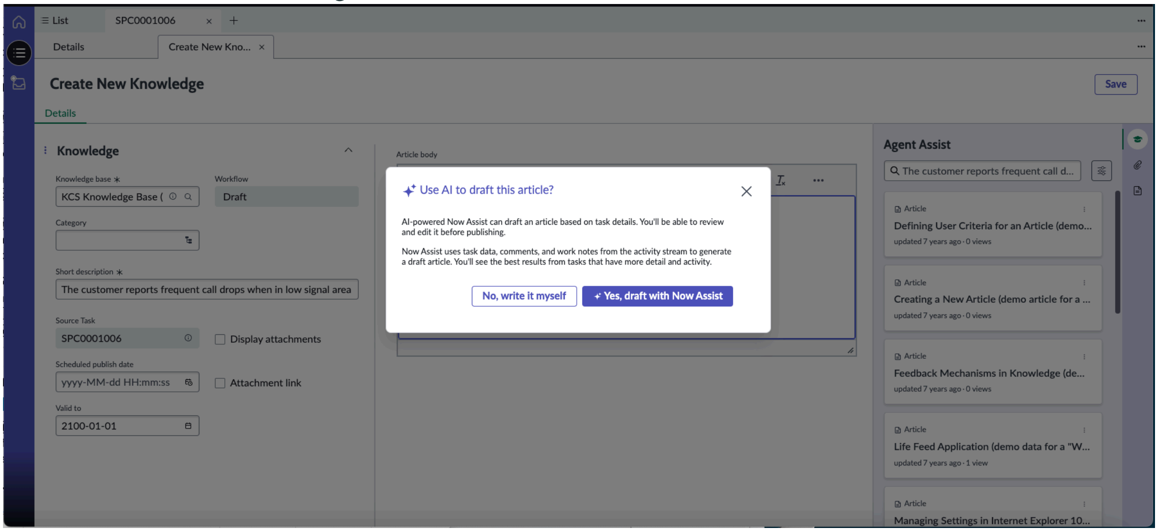
   Note:
   If no options are displayed, the default template selected by your administrator in the Now Assist Admin console is used.

5. Select **Create article**.

servicenow.

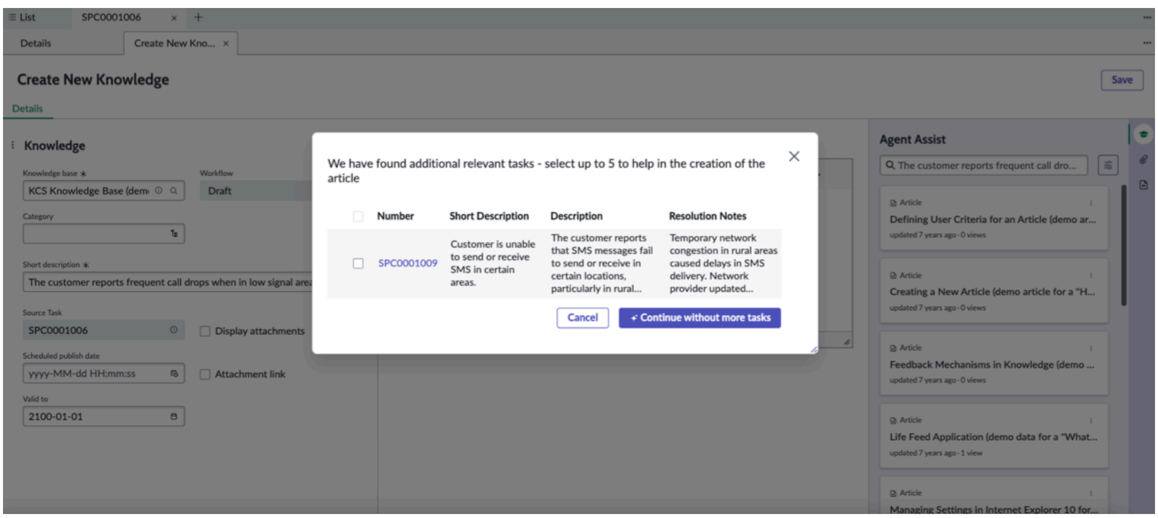
6. In the Use AI to draft this article modal, select **Yes, draft with Now Assist**.

Modal to draft article using AI



7. **Optional:** In the new modal, search for similar cases that can be used to generate the article; otherwise, select **Cancel**.

Additional relevant tasks



The completed article is displayed in the chosen template with a success message "This article was drafted by Now Assist. Be sure to review it for accuracy before saving."

Note:

- If no similar cases exist, this modal doesn't appear, and the article is created. The generated article, based on the chosen relevant records, is linked to both the account case and all the relevant cases selected.
- You can select up to five additional relevant cases in the new modal to generate the article.
- You can modify the draft before saving it. The article appears in a new tab with a unique ID number for the knowledge article and is attached to the parent record.
- If Now LLM Service fails to generate a result, an error message is displayed.
- When creating an article by using Now Assist, after the process is triggered, it can't be stopped. Now Assist continues to generate the article even if you close the modal.

8. Select the **Knowledge Base** and the **Language** in the pop-up window **What language should** `Now Assist` **draft this article in**.
9. Select **Continue**.
   The article is generated in the selected knowledge base and language, and the content is displayed in that same language.
10. Select **Insert** to paste the generated response.
11. Review the Now Assist generated article and select **Save** or **Publish**.
    The Now Assist success message disappears which means that it's no longer a Now LLM Service generated article.

Related topics

Now Assist in Knowledge Management

Summarize test for a technology product support case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the test run summary for a technology product support case record to understand the context of test outcomes and the root cause of the problem.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

The test summarization skill provides you with a concise summary of the test executed for a technology product support case, including the test outcome, test interpretation, and other parameters configured for the specific test definition. With this skill, you can generate the test summary of a technology product support case so that you can analyze the root cause of the problem.

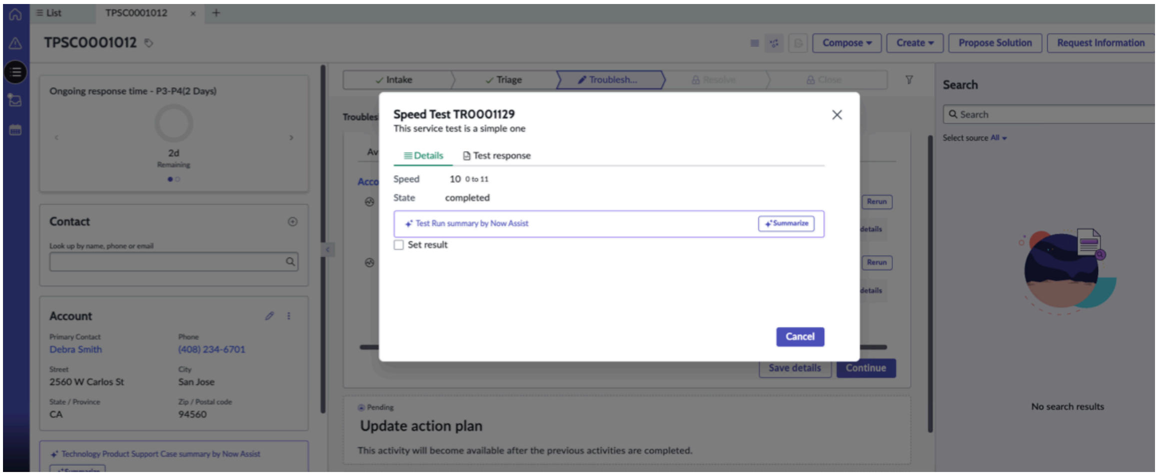
The test summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Test Run summary by Now Assist component to generate a summary. This component appears in the test results record.
- In Core UI, you select the **Summarize** button on the test result record to generate a summary.

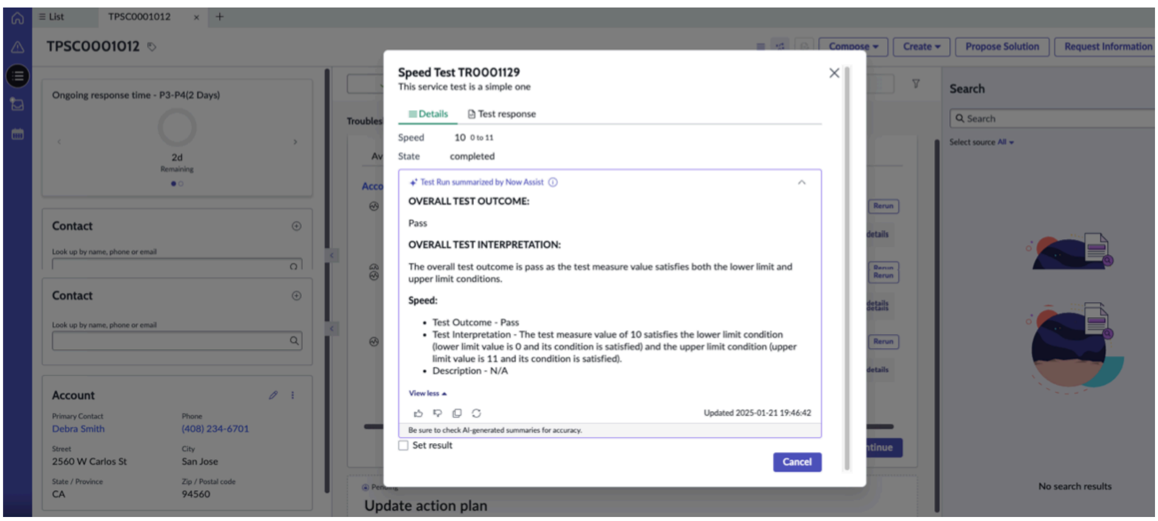
The test summarization skill checks the test results record to determine if there's enough information available to create a summary. If there's enough data, the Test summary component displays the **Summarize** button. If there isn't enough data to generate a summary, the system displays a message in the Test summary component field.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Technology Product Support Case**.
2. Open a technology product support case.
   If there are no test results available, run the tests to get test results.
3. In the **Troubleshoot** tab, select **Test results**.



4. Identify the test result that you want to open and select the View Details icon ( )
5. In the Test Run summary by Now Assist component, select **Summarize**.



The Test Run summary by Now Assist component appears in the test result record. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

Note:
Generating and displaying the summary may take several seconds.

6. **Optional:** After you're finished summarizing the test for the technology product support case, manage the results.
7. **Optional:** Set the test result to either fail or pass by selecting the **Set result**.
8. Save or cancel the results.
   - To set the results, select **Save**.
   - To go back to the test results list, select **Cancel**.

Summarize test for a service problem case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate the test run summary for a service problem case record to quickly understand the context of test outcomes and the root cause of the problem.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The test summarization skill provides you with a concise summary of the test executed for a service problem case, including the test outcome, test interpretation, and other parameters configured for the specific test definition. With this skill, you can generate the test summary of a service problem case so that you can analyze the root cause of the problem.

The test summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Test Run summary by Now Assist component to generate a summary. This component appears in the test results record.
- In Core UI, you select the **Summarize** button on the test result record to generate a summary.

The test summarization skill checks the test results record to determine if there is enough information available to create a summary. If there is enough data, the Test summary component displays the **Summarize** button. If there is not enough data to generate a summary, the system displays a message in the Test summary component field.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the **Diagnose** tab, select **Test results**.
4. Identify the test result that you want to open and select the View Details icon ( )
5. In the Test Run summary by Now Assist component, select **Summarize**.
   The Test Run summary by Now Assist component appears in the test result record. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note:
   Generating and displaying the summary may take several seconds.

6. **Optional:** After you're finished summarizing the test for the service problem case, manage the results.
7. **Optional:** Set the test result to either fail or pass by selecting the **Set result**.
8. Save or cancel the results.
   - To set the results, select **Save**.
   - To go back to the test results list, select **Cancel**.

Generate service summary for a product inventory using Now Assist for Telecommunications, Media and Technology (TMT)

Summarize the service details mentioning the current situation, any critical actions to be taken and find the root cause indicators using the knowledge graph and service summary skill.

Before you begin

Role required: admin

About this task

The customer service summary skill provides you with a concise summary of a sold product, including the current situation, root cause indicators, critical actions, resolution tasks, and resolution details.

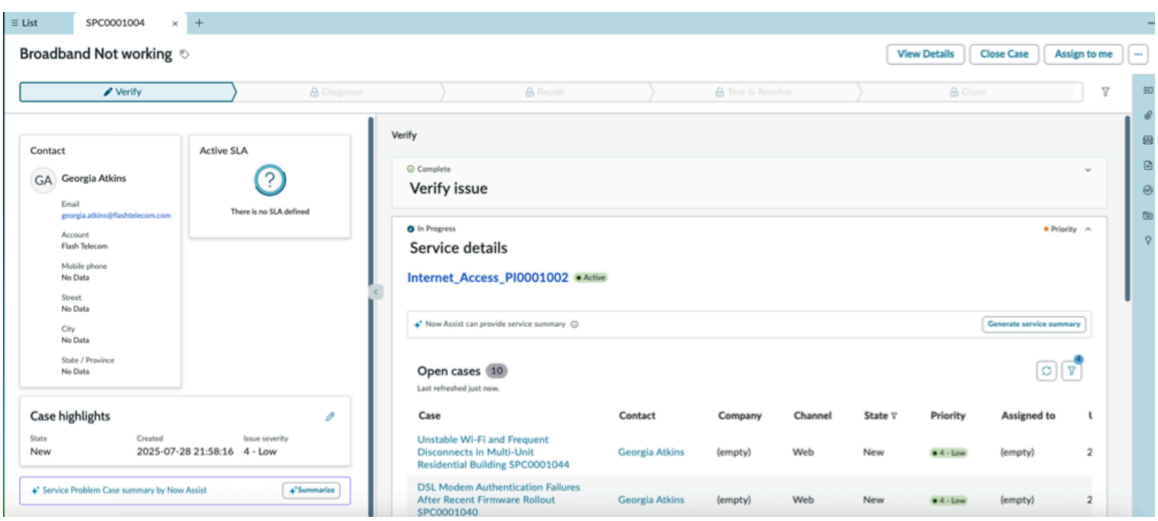
The customer service summary skill is available in CSM/FSM Configurable Workspace, you use the customer service summary skill by Now Assist component to generate a summary.

Install the Customer Service with Service Management (com.sn_cs_sm) plugin to display the activate button for customer service summary skills.

If there’s enough data, the customer service summary component displays the **Generate service summary** button.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case**.
2. Open a service problem case.
3. In the Verify tab, select **Service details**.
4. In the Service details, select **Generate service summary**.



> **Note:**
> Generating and displaying the summary may take several seconds.

5. **Optional:** After you're finished summarizing the service, manage the results.

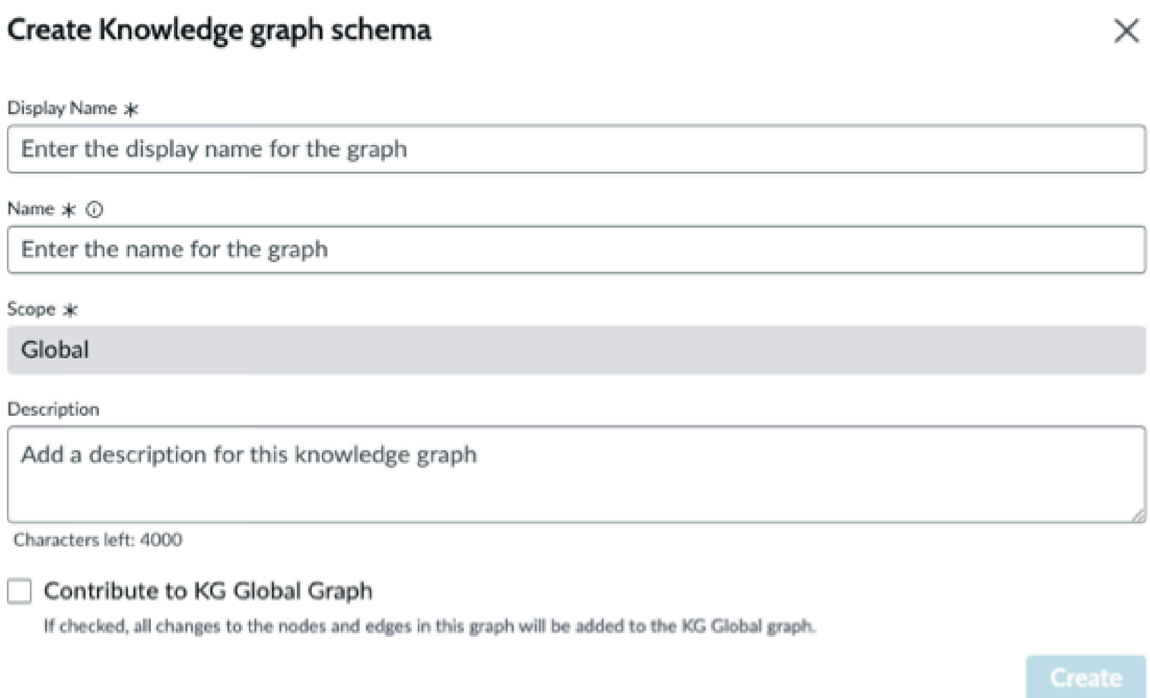
Create a knowledge graph schema

Use the Knowledge Graph (KG) to create Knowledge Graph schema.

Before you begin
Role required: sn_sprb_mgmt_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schema on the landing page.
2. Start creating a Knowledge Graph schema by selecting **Create New**.
   This is an out of the box.
3. On the form, fill in the fields.

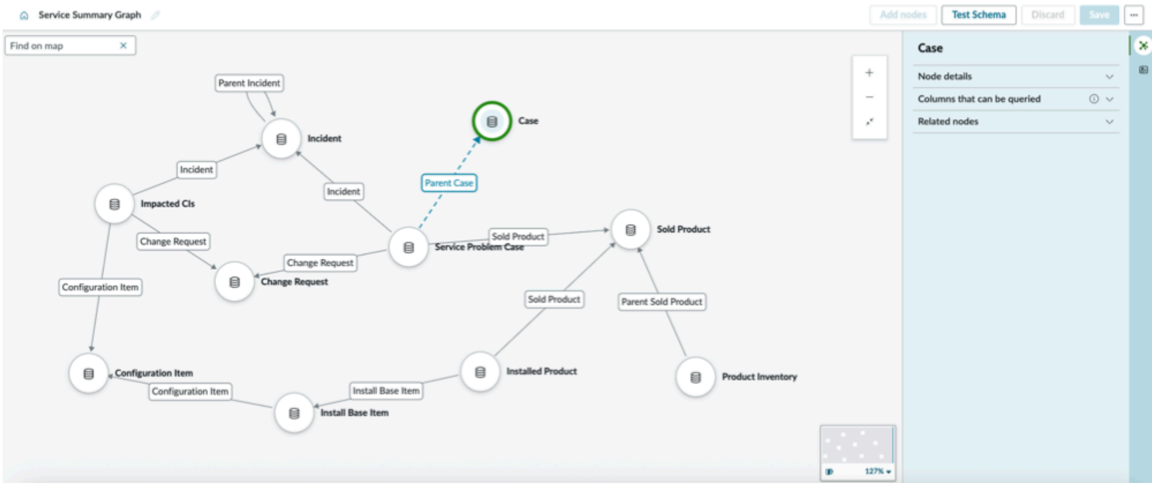


Edit Knowledge Graph Schema details form

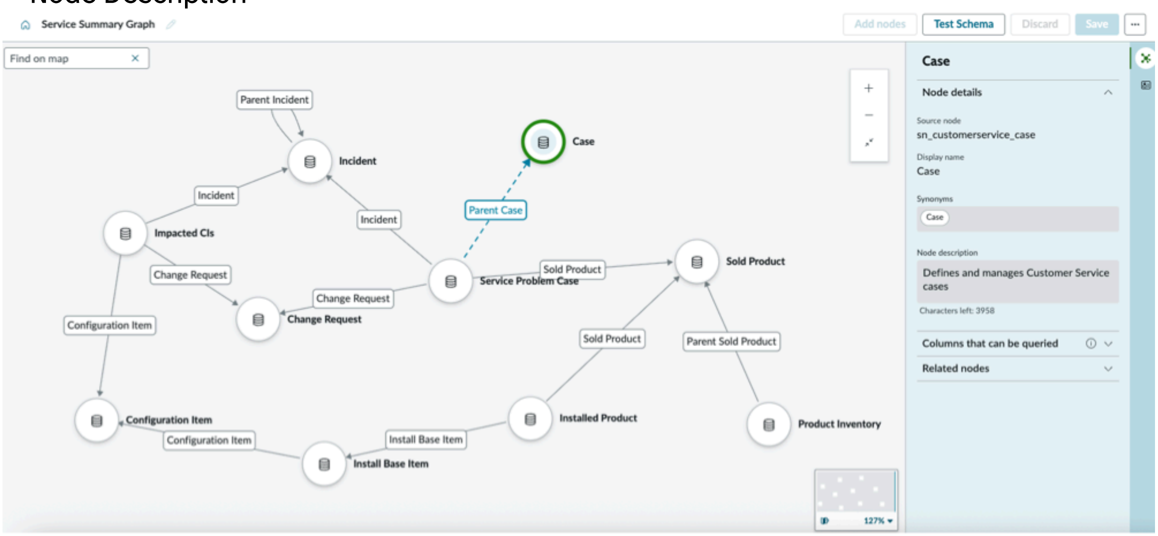
Field	Description
Display Name	Display name for the Knowledge Graph schema.
Name	Optional name for the Knowledge Graph schema.
Scope	Scope used when creating the Knowledge Graph schema. This field is a read only.
Description	Knowledge Graph schema overview to provide additional information to users.
Contribute to KG Global Graph	All the changes to the nodes and edges in the graph are added to the KG Global graph.

4. Select **Create**.
   The Add nodes to the Knowledge graph schema window is displayed.
5. Enter or search for the nodes that you want to add to the Knowledge Graph schema and select **Add**.
   The Knowledge Graph schema is created and displayed on the Knowledge Graph canvas.

6. In the navigation pane, add the following details:
   - Node details
   - Columns that can be queried
   - Related nodes



7. In the Node details section, you can edit the following fields.
   - Node type
   - Node Description



   To manage the nodes in the Knowledge Graph schema, see Manage nodes in a Knowledge Graph schema.

8. In the Columns that can be queried section, search for and select the desired columns and select **Save**.
9. Add, delete, or edit edges in the Related nodes section and select **Save**.

   To edit the Knowledge Graph, you must copy the Knowledge Graph and adjust the settings according to your requirements.

   To edit the Knowledge Graph schema, see Edit a Knowledge Graph schema.

Customize a summary card for service summary

Customize the summary card of the service summary and UI actions according to your needs.

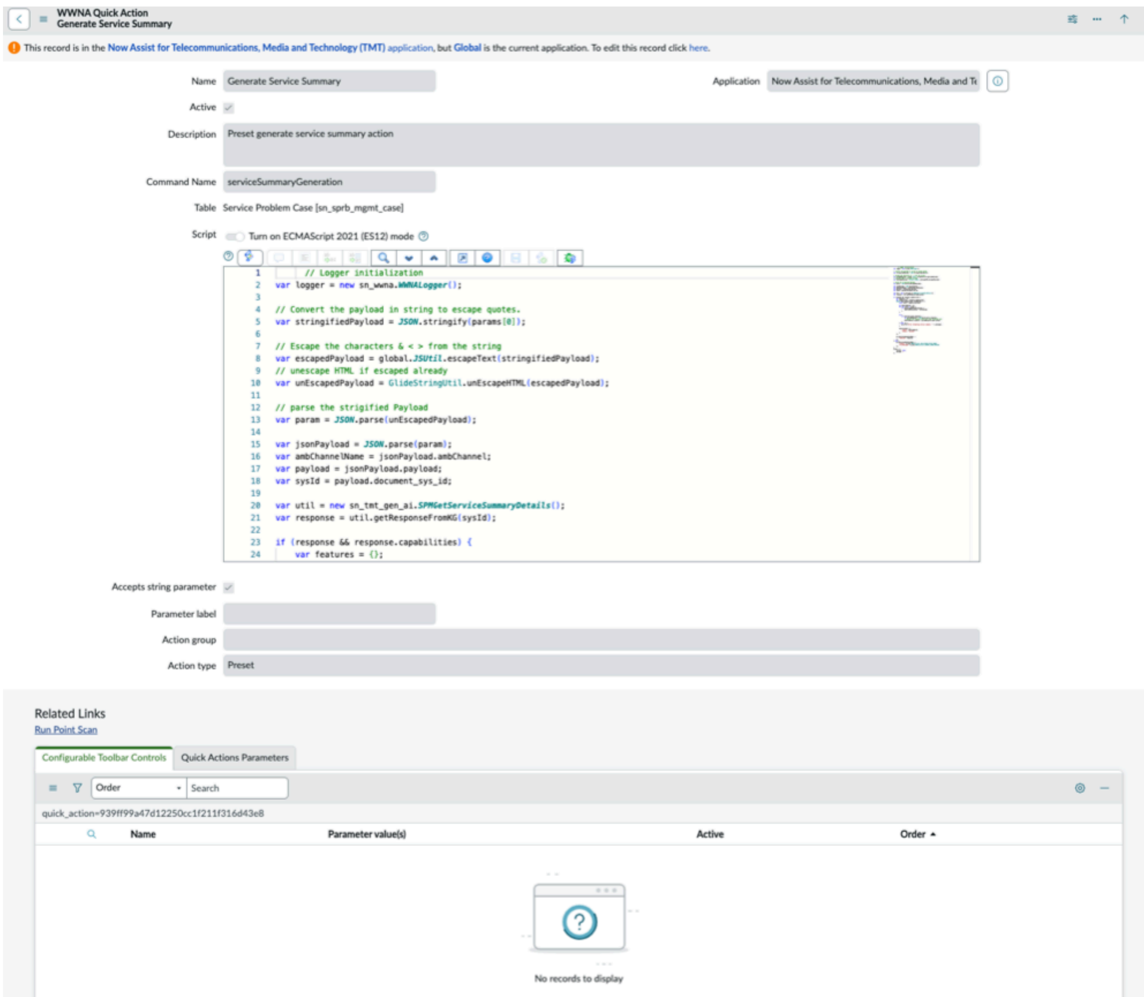
Before you begin

Role required: Admin

Procedure

1. Navigate to **All** > **Quick Actions** > **Now Assist context menu Actions**.
2. In the Quick Actions list, select **Generate Service Summary** record.
3. Select **here** if you see the notice that says:

   This record is in the Now Assist for Telecommunications, Media and Technology (TMT) application, but Global is the current application. To edit this record, click **here**.



4. On the record, update the fields.

   To customize the UI Builder pages, see Customize UI Builder pages using components.

   To configure the UIB Now Assist context menu component, see Now Assist context menu UIB Setup.

5. Select **Update**.

Request the generative AI capabilities in TMT using the Now Assist panel

Request the contextual generative AI capabilities by using the conversational interface in the Now Assist panel. These capabilities include service problem case summary or resolution notes in the TMT application.

Before you begin

Make sure that Next Experience is enabled in the instance. For more information, see Next Experience UI.

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

You can use the Now Assist panel in CSM/FSM Configurable Workspace to request a service problem case summary and generate service problem case resolution notes.

For more information about the Now Assist panel, see Now Assist panel. For information about activating the Now Assist panel, see Activate Now Assist panel standard chat.

Procedure

1. Log in to an instance where the Now Assist for TMT application is installed.
2. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Service Problem Case** > **All**.
3. Open a service problem case.
4. From the header menu, select the Now Assist icon (✦) and request the generative AI capabilities in TMT for a service problem case.
5. Select the relevant generative AI capability from the Now Assist panel.
    - To summarize the service problem case, select **Summarize a record**.
    - To generate the service problem case resolution notes, select **Generate resolution notes**.

Summarize an account onboarding case using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields that you selected on the account onboarding case record. Quickly understand the case context by using the account onboarding case summarization skill in the Now Assist for TMT application.

Before you begin

Role required: sn_acct_lc.agent

About this task

The account onboarding case summarization skill provides you with a concise summary including details about each stage in the account boarding lifecycle. With this skill, you can do the following tasks:

- Generate an initial summary of an account onboarding case so that you can understand the onboarding case context.
- Summarize all the work that has been done on an account onboarding case.

The account onboarding case summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Account Onboarding Case summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the account onboarding case record to generate a summary.

Note:
The account onboarding case summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The account onboarding case summarization skill checks the record to determine if there's enough information available to create a summary:

- When an agent opens the account onboarding case record.
- When an agent refreshes the account onboarding case record page.

If there's enough data, the Account Onboarding Case summary component displays the **Summarize** button. If there isn't enough data, the component displays a message in place of the button.

Note:
The account onboarding case summarization skill requires a minimum 50 words in the case record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Account Onboarding Case**.
2. Open an account onboarding case.
3. In the Account Onboarding Case summary by Now Assist component, select **Summarize**.
   The Account Onboarding Case summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note:
   Generating and displaying the summary may take several seconds.
4. **Optional:** After you're finished summarizing an account onboarding case, manage the results.

Summarize an engagement using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields you select on the engagement record. Get up to speed on success initiatives, outcomes, risks, and internal plays associated with an engagement.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The engagement summary skill provides you with a concise summary of all activities and key points of information associated with an engagement. With this skill, you can do the following tasks:

- Generate an initial summary of the engagement so that you can understand the context.
- Summarize all the work associated with an engagement.

The engagement summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Engagement summary by Now Assist component to generate a summary. This component appears above the Account details card.
- In Core UI, you select the **Summarize** button on the engagement record to generate a summary.

The engagement summarization skill checks the engagement record to determine if there is enough information available to create a summary:

- When an agent opens the engagement record
- When an agent refreshes the engagement record page

If there is enough data, the Engagement summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note:
The engagement summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Engagements**.
2. Open an engagement.
3. In the Engagement summary by Now Assist component, select **Summarize**.
   The Engagement summary by Now Assist component appears above the Account details card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note:
   Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an engagement, manage the results.

Summarize a touchpoint using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from the fields you select on the touchpoint record. Get a quick summary of all the meetings and emails exchanged between different stakeholders and any follow up activities.

Before you begin

Role required: sn_acct_lc.agent

About this task

The touchpoint summary skill provides you with a concise summary of the different touchpoints in the engagement lifecycle. With this skill you can do the following tasks:

- Generate an initial summary of the touchpoint so that you can understand the context.
- Summarize all the work associated with a touchpoint.

The touchpoint summarization skill is available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Touchpoint summary by Now Assist component to generate a summary. This component appears above the Account details card.
- In Core UI, you select the **Summarize** button on the touchpoint record to generate a summary.

Note:
The touchpoint summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The engagement summarization skill checks the touchpoint record to determine if there is enough information available to create a summary:

- When an agent opens the touchpoint record
- When an agent refreshes the touchpoint record page

If there is enough data, the Touchpoint summary component displays the **Summarize** button. If there is not enough data, the component displays a message in place of the button.

Note:
The touchpoint summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Touchpoints**.
2. Open an touchpoint.
3. In the Touchpoint summary by Now Assist component, select **Summarize**.
   The Touchpoint summary by Now Assist component appears above the Account details card. The component is collapsed by default and expands to display the summary. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.

   Note:
   Generating and displaying the summary may take several seconds.

4. **Optional:** After you're finished summarizing an engagement, manage the results.

Summarize an internal play using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a internal play record and all associated internal play tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The internal play summary skill provides you with a summary of the internal play record and associated internal play tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Internal play summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the internal play record to generate a summary.

The internal play summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the internal play record.
- When an agent refreshes the internal play record page.

Note:
The internal play summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Internal plays**.
2. Open an internal play and select **Summarize**.
   The Internal play summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes primary goal (subject, description), engagement, account, product, progress, due date, squad, and details of any contracts under consideration.
   - Progress updates: Summarizes current status (work notes, recent emails), total number of internal play tasks, number of open and closed tasks.
   - Next steps: Shows a summary list of all open internal play tasks, required agent actions, and tasks that are due in the next 7 days.

   Note:
   Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.
3. **Optional:** After you're finished summarizing the internal play, manage the results.

Summarize a customer play using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a customer play record and all associated customer play tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The customer play summary skill provides you with a summary of the customer play record and associated customer play tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Customer play summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the customer play record to generate a summary.

Note:
The customer play summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The customer play summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the customer play record.
- When an agent refreshes the customer play record page.

Note:
The customer play summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Customer plays**.
2. Open a customer play and select **Summarize**.
   The Customer play summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, due date, squad, and customer contact details.
   - Progress updates: Summarizes current status (work notes, recent emails), details of meetings associated with the customer play, total number of customer play tasks, number of open and closed tasks.
   - Next steps: Shows a summary list of all open customer play tasks, required agent actions, scheduled meetings, and tasks that are due in the next 7 days.

   Note:
   Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.
3. **Optional:** After you're finished summarizing the customer play, manage the results.

Summarize a success initiative using Now Assist for Telecommunications, Media and Technology (TMT)

Generate a summary from a success initiative record and all associated success tasks.

Before you begin

Role required: sn_acct_lc.customer_success_agent

About this task

The success initiative summary skill provides you with a summary of the success initiative record and associated success initiative tasks. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Success initiative summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the success initiative record to generate a summary.

Note:
The success initiative summarization skill must be active. If it isn't active, summaries are generated using the out of the box case summarization skill.

The success initiative summarization skill checks the record to determine if there is enough information available to create a summary:

- When an agent opens the success initiative record.
- When an agent refreshes the success initiative record page.

Note:
The success initiative summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Success initiatives**.
2. Open a success initiative and select **Summarize**.
   The Success initiative summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, due date, squad, and customer contact details.
   - Progress updates: Summarizes current status (work notes, recent emails), total number of tasks, number of open and closed tasks, and any related tables.
   - Next steps: Shows a summary list of all open tasks, required agent actions, and tasks that are due in the next 7 days.

   Note:
   Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.
3. **Optional:** After you're finished summarizing the success initiative, manage the results.

Summarize a risk signal and issues using Now Assist for Telecommunications, Media and Technology (TMT)

Generates a summary from a risk signal and issues summarization record and all associated tasks.

Before you begin
Role required: sn_acct_lc.agent

About this task
The risk signal and issues summary skill provides you with a summary of the risk signal and issues record and associated risk occurrences and solutions. This skill available in CSM/FSM Configurable Workspace and in Core UI.

- In CSM/FSM Configurable Workspace, you use the Risk signal and issues summary by Now Assist component to generate a summary. This component appears above the Activities card.
- In Core UI, you select the **Summarize** button on the risk signal and issues record to generate a summary.

The risk signal and issues summarization skill checks the record to determine if there's enough information available to create a summary:

- When an agent opens the risk signal and issues record
- When an agent refreshes the risk signal and issues record page

Note:
The risk signal and issues summarization skill requires a minimum 50 words in the record to generate the summary.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **All Risk Signal and Issues**.
2. Open a risk and select **Summarize**.
   The Risk signal and issues summary by Now Assist component appears above the Activities card. The component is collapsed by default and expands to display the summary. Based on the inputs provided in the Engagement, account, and Short Description, the summary is generated with the following details:
   - Overview: Summarizes the primary goal (subject, description), engagement, account, product, progress, and customer contact details.
   - Progress updates: Summarizes status of work notes, activities, and recent emails.
   - Next steps: Provides recommendations and next steps according to the open Risk Solution records.. If no records are open, the agent generates a summary based on the Risk Category.

   Note:
   Generating and displaying the summary may take several seconds. For longer summaries that don't fit in the window, select **View more** and use the scroll bar to view the rest of the content.
3. **Optional:** After you're finished summarizing the risk signal and issues, manage the results.

Create touchpoints and meeting records using Now Assist for Telecommunications, Media and Technology (TMT)

Send the email to instance to create the touchpoint and meeting records directly from the inbound email using Now Assist for Telecommunications, Media and Technology (TMT).

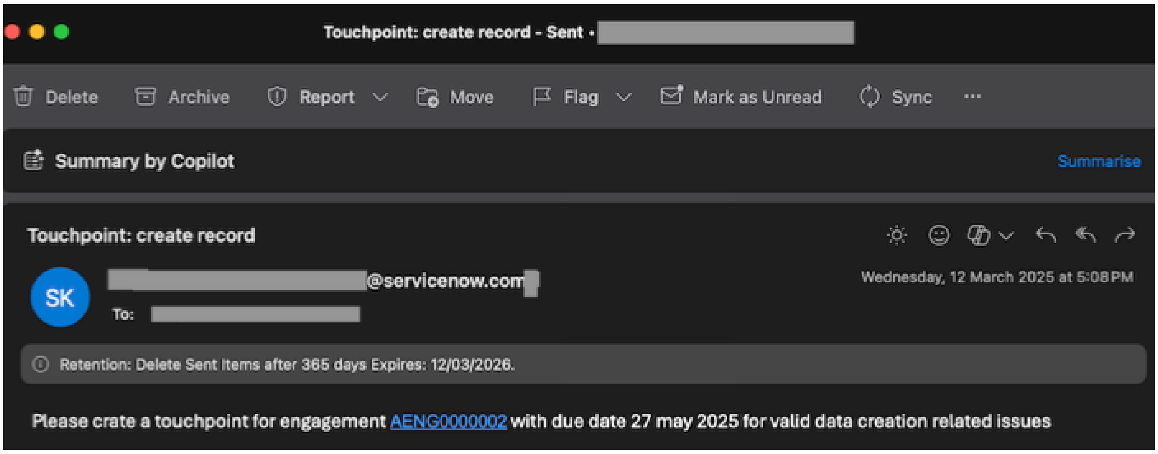
Before you begin
Role required: Success agent

To enable the email sending, see Outbound mail configuration.

To enable the email receiving, see Inbound mail configuration.

Procedure

1. Launch the email application.
2. Select **New Email**.
   The new Email must contain the following information:



Field	Descriptions
From	Email id of the sender.
To	Email id of the instance that is instancename@service-now.com. For example: devgen@service-now.com
Subject	The subject of the email must start with the prefix Touchpoint: For example: Touchpoint: Create a touchpoint for test.
Email message	For Touchpoints, the Email message must contain the required fields: ◦ Engagement number ◦ Due date ◦ Subject ◦ Description For Meetings, the Email message must contain the required fields: ◦ Source ◦ Start date and time

Field	Descriptions
	○ End date and time ○ Meeting subject

3. Select **Send**.

Note:
The instance may take several seconds to receive the email.

Result

- In the instance, the Inbound Email Actions validates the email.
- If the validation fails, you receive the email with the validation error and template description.
- If the validation passes, a record is created in the touchpoint and you receive a success email with the link to the created record.
- The emails are prepared and pushed to the outbound queue where they're scheduled to be sent.

Analyze metric data trend

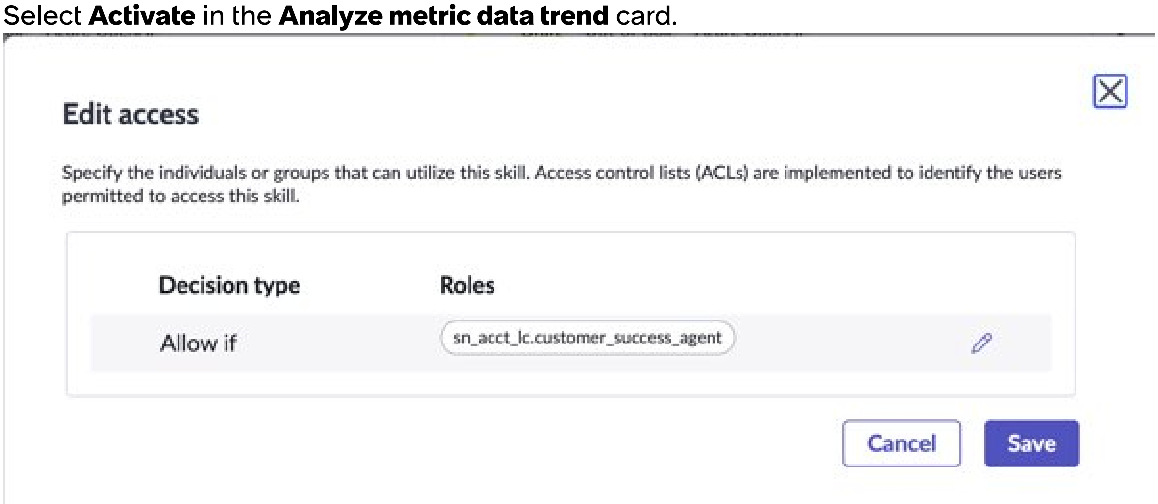
Retrieves and analyzes health metric data for an engagement.

Before you begin
Role required: sn_acct_lc.customer_success_agent

About this task
Collects and analyzes metric data for an engagement and determines if a risk signal is to be created. The Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow uses the metric data to monitor the health score and generates risk signals when the Poor and Neutral range thresholds defined in the Color Banding table are exceeded. You can view the status of the metric collection in the Now Assist panel.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Now Assist Skills**.
2. Select **Activate** in the **Analyze metric data trend** card.



3. Select the user role that can utilize this skill and select **Save** to activate the skill.
   The collected metric data is used by the Now Assist for Telecommunications, Media and Technology (TMT) Monitor engagement health agentic workflow.

Automate transforms with Now Assist for TMT

Use the Now Assist for TMT Transform Mapping Assist feature to automatically transform inbound and outbound data between provider and consumer tables.

Before you begin

Role required: admin

About this task

The Transform Mapping Assist skill is designed to do the following:

- Automatically generate choice mappings between provider and consumer tables.
- Provide meaningful error messages if the inbound or outbound data cannot be transformed.
- Help save time and reduce manual effort by automating the transformation mapping process.
- Help reduce errors and enhance the quality of integrations through automatic mapping.

Procedure

1. Navigate to **All** > `Service Exchange` **Provider** > **Administration** > **Transforms**.
2. Click **New** and create a simple transform.
   See Create a transform in Service Exchange for instructions. The Now Assist for TMT Transform Assist Mapping can be used only with simple transforms.
3. Select the provider and consumer tables and the related fields.
4. Click **Mapping Assist**.
   Transform mappings are generated and inserted into the Transform lines related list.

   Note:

   - The Transform Mapping Assist feature can be used only if you select choice list fields in the Provider and Consumer fields.
   - You can delete all the generated transform lines to rerun the mapping if needed.
   - If you try to create a transformation mapping between different types of fields, you will see the following warning message:

     ```
     The selected fields are different. Are you sure you want
     to map these fields? This action may lead to unintended
     results.
     ```

     Click **OK** to continue with the mapping. If no mappings are found, an error message is displayed. You can either review the configuration settings and modify as required or create the mappings manually.

Proactive Service Experience Workflows

The Proactive Service Experience Workflows application enables service providers to deliver comprehensive support while understanding customer impact and maintaining transparent communication with all parties involved in the support process.

Watch this short video for an introduction to the Proactive Service Experience Workflows application.

https://player.vimeo.com/video/981575621?h=19878717a5

Explore	Configure
Learn about how service providers and customers use Proactive Service Experience Workflows.	Plan and customize Proactive Service Experience Workflows to meet your specific needs.
Use	**Reference**
Use Proactive Service Experience Workflows to resolve the network-initiated incidents and notify the impacted customers.	Learn about user roles, main components, and domain separation in Proactive Service Experience Workflows.

Additional resources

- Learn more about what's new and changed, see the Proactive Service Experience Workflows.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Proactive Service Experience Workflow features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Proactive Service Experience Workflow users at Now Community.

Sales Customer Relationship Management

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

Explore

Learn how you can use the Sales CRM applications.

Configure

Plan and configure your Sales CRM implementation.

Use

Use the Sales CRM applications as an agent.

Integrate

Extend capabilities in Sales CRM by integrating with other applications.

Reference

Get details about components such as fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the Sales Customer Relationship Management release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Sales CRM features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Service Exchange

ServiceNow® Service Exchange connects multiple ServiceNow instances to provide seamless support and service experiences across the ecosystem, from enterprise customers to suppliers and system integrators. Service Exchange provides a frictionless experience that makes it easy to collaborate and process requests while giving users the convenience of working in their own ServiceNow instance.

Watch this short video for an introduction to the Service Exchange application.

https://player.vimeo.com/video/973114049?badge=0&autopause=0&player_id=0&app_id=58479

Get started

Service Exchange for Providers	Service Exchange for Consumers	Service Exchange Knowledge Base
Learn about the new Service Exchange application for providers	Learn about the new Service Exchange application for consumers	Review the Service Exchange knowledge base articles.

Strategic Portfolio Management for Telecommunications

The Strategic Portfolio Management for Telecommunications is a product that inherits all features of Strategic Portfolio Management along with the addition of two templates for Fiber Rollout and 5G Projects.

Strategic Portfolio Management for Telecommunications enables you to define and customize the tasks and requirements for your Fiber Rollout and 5G projects. A project template defines the basic structure of a project and can include project tasks and subtasks, attachments, checklists, and other project information. Because projects often get repeated, templates enable you to create, save, and reuse project structure. You can also modify existing templates, create projects from templates, and apply templates to empty projects.

Fiber Rollout project template

The Fiber Rollout project template can address challenges customer experience due to disjointed planning, delayed service and network delivery due to manual processes, and delayed service impact analysis. Using this template can improve the fiber rollout process by:

- Accelerating the design process
- Defining and tracking the construction and rollout
- Providing timely notifications regarding the service delivery

5G project template

Using the 5G project template can simplify and streamline the project management process by:

- Proactively identifying project tasks
- Ensuring that all critical steps in the planning process are included
- Allocating appropriate resources for target dates
- Identifying key team members and stake holders
- Reducing delays and cost overruns
- Assessing risks early in the project
- Improving cross team and cross project collaboration

Strategic Portfolio Management for Telecom Fiber rollout project template

This template describes the various tasks required for a fiber rollout.

The Fiber rollout project template contains the following basic tasks:

- Plan and build the network
- Network design
- Construction and rollout
- Service delivery and activation
- Customer support
- Service readiness
- Plan for future demand and network build

You can create a project from this template or modify this template according to your requirement. For more details on using project templates, see Project templates.

Telecommunications Network Inventory

With the ServiceNow® Telecommunications Network Inventory application, you can build a digital representation of your physical and logical networks, and the services that are provisioned to your customers. This network inventory contains the assets, services, and the relationships that define the infrastructure of your telecommunications networks.

Watch this short video for an introduction to the Telecommunications Network Inventory application.

https://player.vimeo.com/video/1017254752?badge=0&autopause=0&player_id=0&app_id=58479

Get started

Explore	Configure	Integrate
Learn about how providers use Telecommunications Network Inventory.	Plan and configure your Telecommunications Network Inventory.	Extend Telecommunications Network Inventory capabilities by integrating with other applications.

Use	Reference	
Use Telecommunications Network Inventory to create and review a comprehensive network inventory model.	Get Telecommunications Network Inventory reference information.	

Additional resources

- Learn more about what's new and changed, see the Telecommunications Network Inventory release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Telecommunications Network Inventory features at Now Create.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Telecommunications Network Inventory users at Now Community.

Telecommunications Service Operations Management

Proactively monitor the health of your networks and services that helps to prevent potential downtime. Streamline your response with Event Management and Metric Intelligence.

Telecommunications Service Operations Management (TSOM) integrates with monitoring tools such as Event Management and Metric Intelligence to simplify operations and provides an end-to-end service view across telecommunications technology domains. The TSOM uses the TM Forum Alarm Management API to automate the collection, correlation, and analysis of vast network event data across disparate domains. It provides front and back-office teams with a single end-to-end service health view.

See Telecommunications Service Operations Management for more information about how to configure and use this application.