Zurich Manufacturing

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Manufacturing Commercial Operations

The#ServiceNow® Manufacturing Commercial Operations (MCO) enables you to optimize sales, support, and service operations to enhance operational efficiency, lower costs, and improve productivity.

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Learn how Manufacturing Commercial Operations can help you with its key features and benefits.

Configure

Plan and customize Manufacturing Commercial Operations to meet your specific needs.

Use

See how manufacturers, dealers, and consumers can use Manufacturing Commercial Operations to manage manufacturing ecosystems.

Reference

Get additional information about Manufacturing Commercial Operations use cases and components.

Data Model

Framework for workflow integration.

Now Assist for MCO

Use Now Assist for MCO to enhance user productivity and efficiency through conversation and proactive experiences using Now Assist.

Additional resources

- Learn more about what's new and changed at Manufacturing Commercial Operations 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 Impact.
- Connect with other Customer Service Management users at Now Community.

Explore Manufacturing Commercial Operations

Learn how the#Manufacturing Commercial Operations solution can help your organization to speed up revenue and create differentiated customer and channel experiences while reducing operations costs.

Overview of Manufacturing Commercial Operations

The Manufacturing Commercial Operations product offers a single platform to manage your sales, support, and service operations. You can manage the end-to-end life cycle of your products, promotions, and services. Key benefits of the Manufacturing Commercial Operations include:

Sales promotion campaign management

Manage campaigns with ease. Boost sales and related claims to compensate channel partners/dealers.

Recall campaign management

Plan, launch, and monitor product recall campaigns. Resolve claims related to product recalls.

Repair (recall and warranty) claims

Submission and approval of repair claims for both warranty and recall. Post-sales service through product recall campaigns, Warranty, and recall related claims management.

Pre-authorization request

Submission and approval of pre-authorization requests to verify the coverage of specific parts, fees, or repairs under an existing warranty or service contract.

Dealer portal

Access real-time information about the ongoing and upcoming product recall and sales promotions. Better engagement with the dealer and channel partner through the dealer portal.

Optimize the lead-to-cash cycle and increase revenue

Manage leads and opportunities from start to finish and map customer requirement to the best offers with Order Management. Launch complex products and services fast with configurable catalogs.

Improve agility and savings with automated exceptions and disputes workflows

Automate the order exception and invoice dispute management processes by fusing customers, Original Entity Manufacturers (OEMs), channels, and partners with one system of engagement and action.

Manage the manufacturing ecosystem in real-time

Securely build business workflows across the ecosystem using Service Exchange. Manufacturers can adopt to new features, publish, and synchronize the product offerings to customers, suppliers, channels, and partners, all within one system of engagement.

Manufacturing Commercial Operations users

Users

User	Description
Manufacturing Operations Admin	• Access to all Manufacturing Commercial Operations features and tables. • They can perform both dealer and OEM (Original Equipment Manufacturer) operations. • They can add, remove, and, update the dealer members and assign the responsibilities to dealer members for approval or rejection of the claims.
Sales Promotion Manager	• Member of the OEM marketing team. • They can create, read, update, and cancel a sales promotion.
Claims Agent	• Member of the OEM team. • They can view, approve, recall, and reject claims.
Dealer Sales Agent	Create, view, update, and cancel a sales promotion claim case.
Dealer Operations Admin	Create, read, update, or cancel all the claims.
Recall Manager	• Member of the OEM team. • They can create, read, and update a recall campaign claim.
Recall Phase Owner	• Member of the OEM team. • They can update, publish, close, and cancel a recall campaign phase or sub-phase.
Dealer Service Advisor	Create, view, update, and cancel a repair claim case.
Warranty Specialist	• Member of the OEM team. • They can view, approve, send back, or reject pre-authorization requests.
Quality Issue Management Admin	They have default access to all the quality management features and tables.

Users (continued)

User	Description
Product Non-conformance Submitter	• They can create, view, update and cancel a non-conformance case. • They can create a correction action and add expense line to it.
Product Non-conformance Triager	• Member of the OEM team. • They can perform the following: ○ NC Submitter abilities ○ Review new submissions ○ Check completeness ○ Determine priority and severity ○ Assign to resolvers • They can update triage information but can't perform remediation action.
Product Non-conformance Resolver	• Member of the OEM team who has access to NC triager and owns NC execution. • They can create, view, and update all NC-related tables.
Product Quality Investigation Member	• Member of the OEM team who can edit PQI and PQI tasks. • They can create remediation action plan, actions, and financial requests.
Product Quality Investigation Lead	• Member of the OEM team. • They can create, view, update, and cancel quality investigation and related tables. • They can sign off the investigation and move it to closure.
Remediation Action Plan Approver	• Member of the OEM team. • They can review proposed action plan, record the approval decisions, and add comments on the plan.

Users (continued)

User	Description
Finance Approver	• They can view all the tables. • They can approve, reject, or send back the financial request, planned line charge, and expense line records.

Manufacturing Commercial Operations workflow

With Manufacturing Commercial Operations applications combined with ServiceNow® workflows, your organization can speed up revenue, improve profitability, and deliver exceptional customer and channel experiences.

Manufacturing Commercial Operations benefits

Components

Benefit	Feature
Manage sales promotion campaigns and streamline collaboration with dealers to resolve claims. Support bulk upload of sales promotion claims. It's a playbook guided experience for OEM assessor to resolve claims.	Sales promotion
Manage collaboration with dealers to submit and resolve claims for repairs performed under warranty. Supports dealers to submit, edit, and track claims. It's a playbook-guided experience both dealer service advisor (submit the claims) and OEM claims agent to resolve claims.	Repair claims
Support creation of a recall campaign, manage it, and track it to closure.	Recall campaign
Reduce quality costs, accelerate issue resolution, and build customer trust through proactive and consistent quality management.	Quality issue management
Provide dealers a single unified experience to collaborate with New dealer portal. It's a guided experience to submit, edit, and track claims.	Dealer portal
Resolve customer issues and requests for your customers. By adopting a proactive customer service approach, you can increase your customer satisfaction and retention.	Customer Service Management See, Additional features
Manage order to cash operation processes. Provides agility to launch new services and subscriptions and capture up-sell and cross-sell revenue.	Order to cash operations See, Additional features

Components (continued)

Benefit	Feature
Self-service connectivity between multiple ServiceNow® instances within the enterprise and across the ecosystem. Improves collaboration across OEMs, B2B customers, suppliers, and other partners.	Service Exchange See, Additional features
Provide self-service capabilities, support requests on products, subscriptions, and services. Proactive, consistent, and real-time communication. Define the organization, hierarchies, and relationships with the end customers with Service Model Foundation capabilities.	Channel Support Operations See, Additional features

Related topics

Domain separation for MCO

Core features

Manufacturing Commercial Operations Manufacturing Commercial Operations (MCO) features enables you to raise sale promotion and recall campaign and raise claim requests for repair.

MCO core features

Features	Description
Sales promotion	The sales promotion framework provides OEMs with the tools to efficiently publish and manage promotional campaigns.
Recall campaign	A recall process is a systematic procedure initiated by Original Equipment Manufacturers (OEMs) to address defects or issues identified in their products after they have been distributed to customers.
Repair claims	In Repair claims, customers report product issues to the dealer, who diagnoses, repairs, and requests reimbursement for the work done.

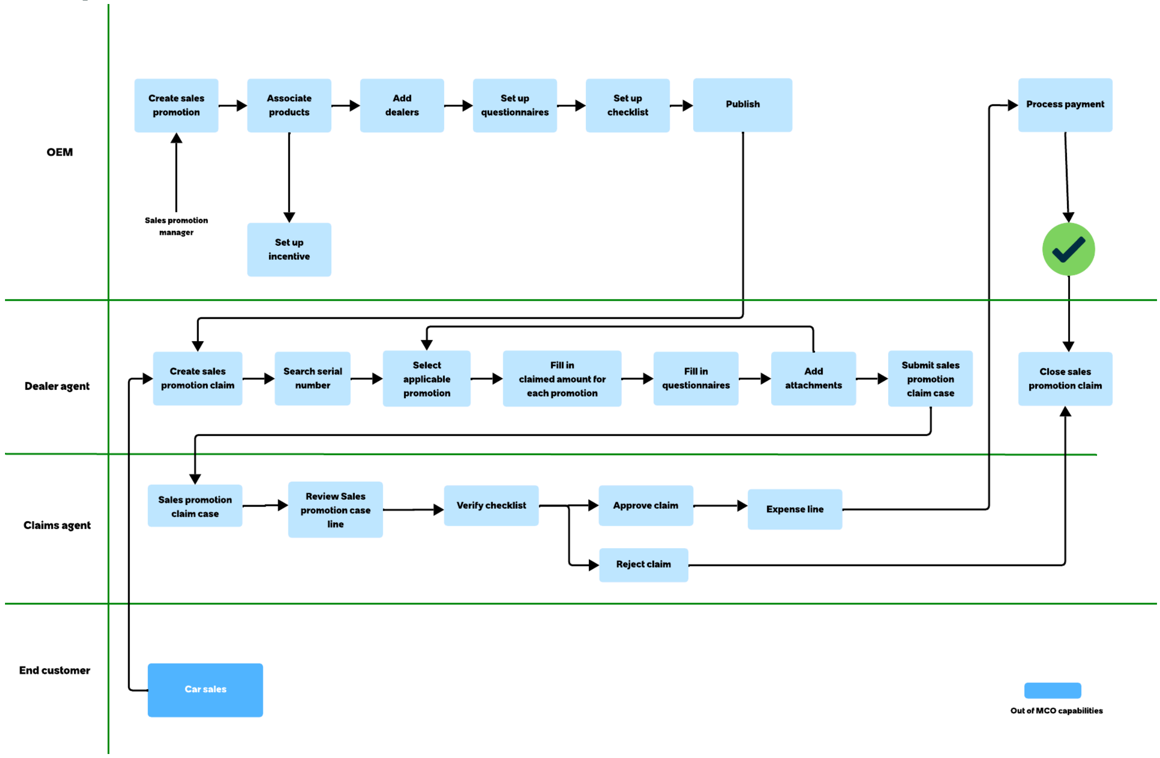
Sales promotion

Original equipment manufacturers (OEMs) come up with sales promotions (discounts) based on specific criteria or targeted promotions to a set of customers. After the OEM proposes a sales promotion, the channel partner extent these promotions and discounts to the end customers during sales transactions. The OEM must reimburse the additional discounts or offers provided by the dealers during the sales process.

This feature enables the seamless collaboration between OEMs and their dealers to manage sales promotions and claims. The sales promotion framework enables the OEMs to publish and manage the promotional campaigns efficiently. The dealer portal enables the dealers to submit claims for reimbursement post product sales transactions. There are three parts to the sales promotion.

- Creation of sales promotion by the OEM.
- Creation of claim against the promotion by the dealer.
- Review and reimbursement for the claim by the OEM.

Sales promotion workflow



1. Create sales promotion: OEM creates the sales promotion campaign.
2. Associate products: OEM adds the products applicable for the sales promotion campaign.
3. Set up incentive: Set up the incentive for the dealers.
4. Add dealers: Add the dealers who are eligible for the sales promotion campaign.
5. Set up questionnaires: Configure the promotion questionnaires.
6. Set up checklist: Configure the checklist template.
7. Publish: OEM publishes the sales promotion campaign for the applicable dealers.
8. Create sales promotion claim: The dealer agent creates the promotion claim for the applicable customers.
9. Search serial number: Add the product, which is applicable for sales promotion campaign.
10. Select applicable promotion: Select the applicable promotion from the list of promotions.
11. Fill in the claimed amount: Update the claimed amount for the selected promotion.
12. Fill in the questionnaires: Update the promotion questionnaires.
13. Add attachments: Add the attachments, if necessary.
14. Submit claim case: The dealer agent submits the claim to the OEM.
15. Sales promotion claim case: A claims agent can view the list of sales promotion submitted by the dealer.
16. Review sales promotion case line: A claims agent reviews the claims.
17. Verify checklist: Verifies the checklist.

18. Approve: Approves the claims if it matches all the required criteria.
19. Expense line: Expense line is generated for the approved claims.
20. Process payment: The payment is processed.
21. Close sales promotion claim: The claim is closed.
22. Reject claim: Rejects the claims if it doesn't match the required criteria.

Related topics

Sales promotion campaign data model

Set up sales promotion

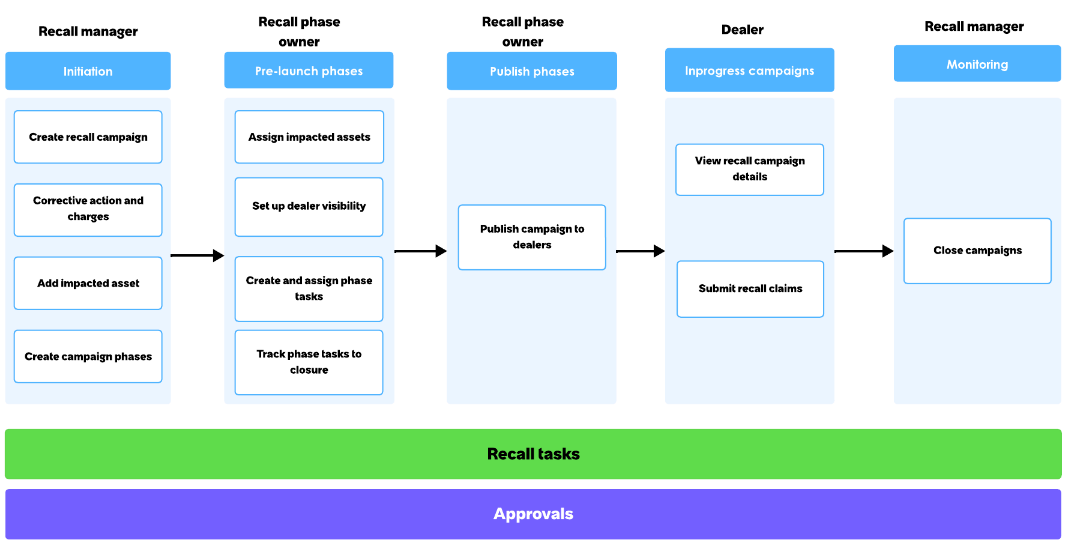
Sales promotion management

Sales promotion claim management

Recall campaign

A recall process is a structured procedure launched by Original Equipment Manufacturers (OEM) to fix defects or issues in their manufactured products that are sold to the customers. Dealers can submit repair claims for work performed as part of recall campaigns, while OEM assessors benefit from a playbook-guided experience that simplifies and standardizes claim resolution.

Recall campaign workflow



1. Create recall campaign: The Recall manager creates the recall campaign.
2. Corrective action and charges: The dealer enters the parts and software asset details for which the claim is raised.
3. Add impacted: The Recall manager adds the assets that are impacted for the recall campaign.
4. Create campaign phases: The Recall manager creates the campaign phases based on the location or the dealer.
5. Select dealers included: OEM selects the dealers who are impacted by the recall campaign.
6. Publish the campaign to dealers: Recall phase owners sends the campaigns to the dealers.

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7. View recall campaign details: Dealers can view the recall campaign details created by the recall manager.
8. Submit recall claims: The Dealer submits the recall claims.
9. Close campaigns: The Recall manager closes the recall campaigns.

Related topics

Recall campaign data model

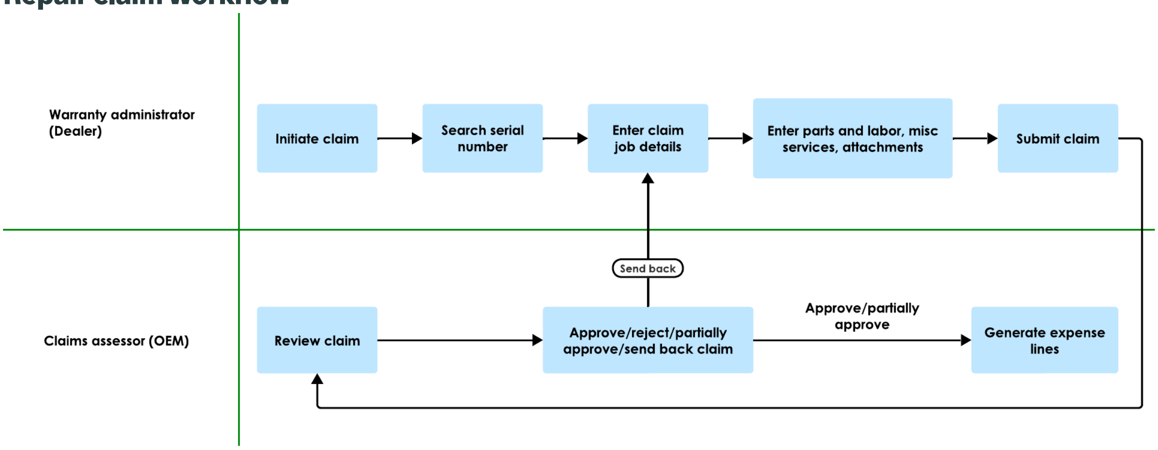
Phases and Sub-phases

The MCO agent portal enables manufacturers to manage recall campaigns through a structured workflow. The portal provides capabilities to create campaign phases and sub-phases, select target assets for recall, launch campaigns, and notify affected dealers.

Repair claims

In the Repair claims workflow, the customer approaches the dealer with issues related to one or more products. The dealer diagnoses and fixes the issue and raises the reimbursement for the repair work performed.

Repair claim workflow



1. Initiate claim: The dealer initiates the warranty or recall claim.
2. Search serial number: Dealer can search the claim details based on the serial number.
3. Enter claim job details: The dealer enters the job details in the dealer portal.
4. Enter parts and labor, misc services, attachments: The dealer enters the labor code and parts in the dealer portal.
5. Submit claim: The dealer submits the claims request to the OEM.
6. Review claim: OEM reviews the claims request submitted by the dealer.
7. Approve claim: OEM reviews the claims and either approves, rejects, partially approves, or sends back the claim.
8. Generate expense line: The claims agent processes the expense line and is generated only for approved or partially approved claims.

Related topics

Repair claims data model

Repair claim

Submit a repair claim for warranty

Submit a repair claim for recall

Pre-authorization request

The dealer and agent portal enables authorized users to initiate pre-authorization requests for warranty coverage. Before starting repair work, dealers and agents can submit requests to verify whether specific parts, labor fees, or repairs are covered—ensuring proper authorization.

Quality issue management

Quality issue management (QIM) application enables manufacturers to capture, track, and resolve non-conformance and quality investigations using structured, end-to-end workflows.

The Quality Issue Management consists of two integrated applications that work together to support your quality management needs:

- Manufacturing quality management
- Remediation core

Manufacturing quality management

Manufacturing quality management enables teams track and resolve Non-Conformances (NCs) and Quality Issues (QIs) across products, assets, and operations by capturing problems, coordinating investigations, and fostering stakeholder collaboration.

Related topics

Product non-conformance

Product quality investigation

Product non-conformance

Product non-conformance (PNC) case provides a streamlined mechanism to capture and address deviations when they occur.

The PNC workspace supports:

- Review and Route: Assign issues to the appropriate stakeholders.
- Correction Actions: Implement measures to resolve non-conformance.
- Containment Actions: Avoid further impact while corrective actions are in progress.
- Closure Reporting: Document resolution and formally close the issue.

Product quality investigation

Product quality investigation (PQI) is an organized method used to find, examine, and address problems with a product or service—like defects, non-conformance, or customer complaints. QI needs comprehensive investigation with multiple stakeholders.

The PQI workspace supports:

- Root Cause Analysis: Identify the underlying causes of defects.
- Long-Term Resolution: Implement corrective and preventive actions.
- Continuous Improvement: Enhance processes to avoid recurrence.

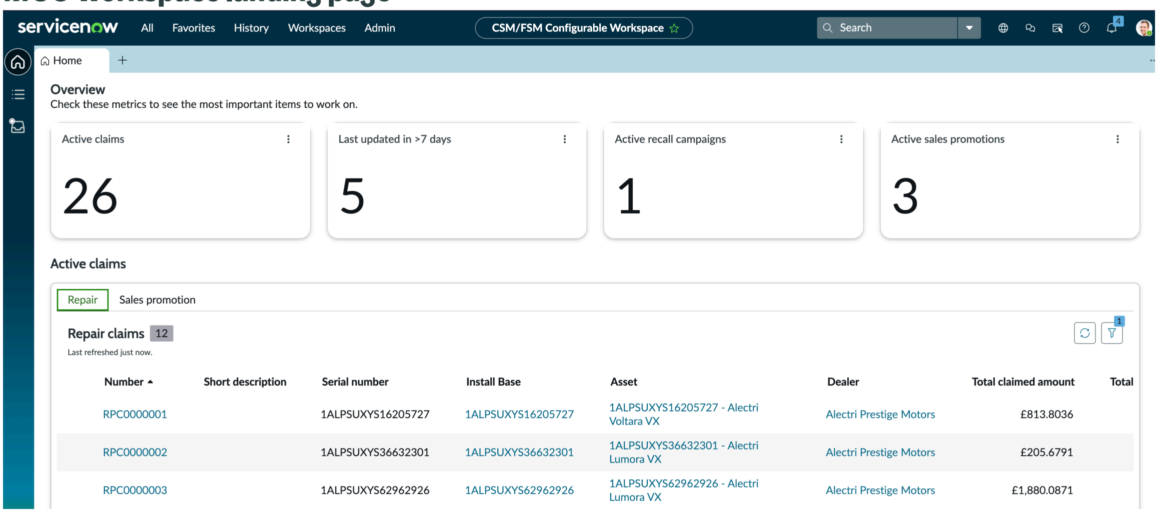
Remediation core

The Remediation core enables organizations identify root causes and implement structured remediation plans for both operations and finances. It supports quick fixes and long-term solutions to resolve issues efficiently and sustainably.

Manufacturing Commercial Operations landing page (Agents workspace)

Manufacturing Commercial Operations enables OEMs or manufacturers to use Agents workspace as a landing page to create sales promotion and recall campaigns. It also enables the agents to view, submit, review, and approve claims.

MCO workspace landing page



The agent workspace landing page includes different sections and components.

Components of the agent workspace landing page

Tabs/Fields	Description
Active claims	Number of active claims that includes repair, recall, and sales promotion claims.
Last updated in 7 days	Recently updated claims.
Active recall campaigns	Active campaigns created and published by OEMs.
Active sales promotions	Active sales promotion campaigns created and published by OEMs.

Related topics

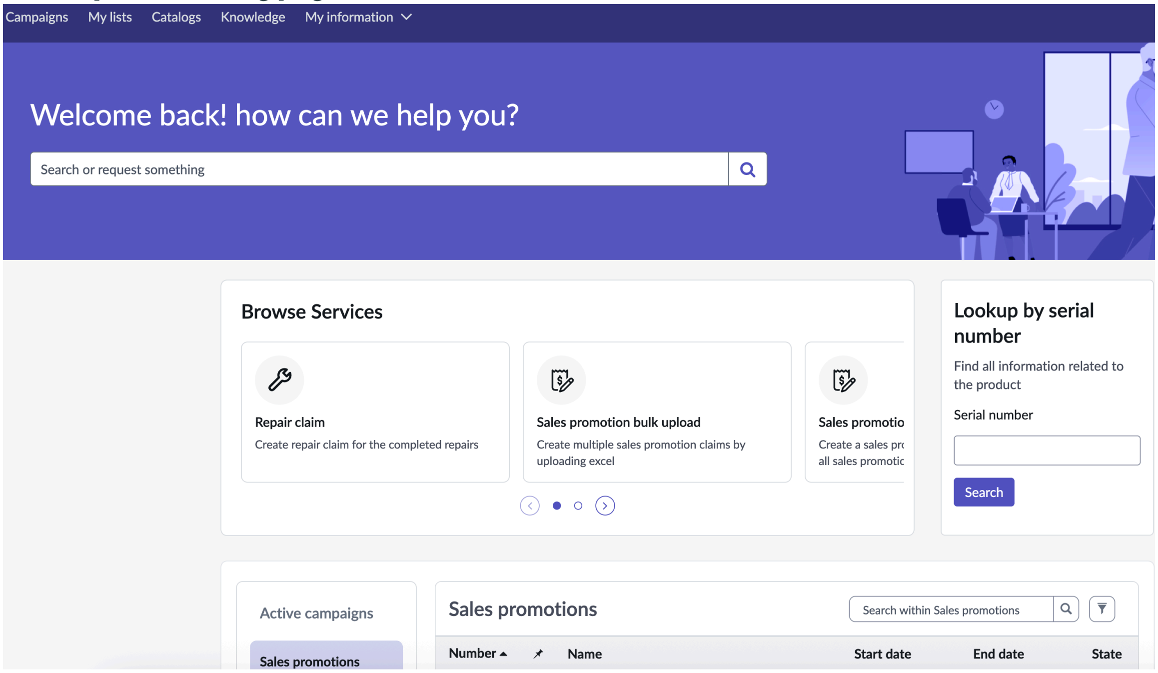
- Set up MCO
- Set up sales promotion
- Agent management

Dealer portal

The dealer portal enables the OEM and Dealers to engage in the post-sales customer service requirements like claim submission, product recall announcements, customer service requests.

It enables dealers to efficiently manage day-to-day business operations. The portal also provides real-time data insights, enabling proactive monitoring and informed decision-making.

Dealer portal landing page



The Dealer Portal landing page includes different sections and components.

Components of the Dealer Portal landing page

Tabs/Fields	Description
Campaigns	Displays the campaigns created for sales promotion and recall.
My lists	Displays the list of claims that includes: • Sales promotion claims • Sales promotion bulk upload • Repair claims • All Cases
Catalogs	Displays the categories under the dealer catalog: • Customer Operations • Support & services
Knowledge	Knowledge bases contain articles that provide users with information such as self-help and task resolution.
My information	Displays the dealer information.

Components of the Dealer Portal landing page (continued)

Tabs/Fields	Description
	Note: Here, dealer is business location.
Search or request something	Enter the information that you're looking for. The search option helps you easily and quickly find the information you need.
Browse Services	Lists all the features supported by MCO.
Lookup by serial number	Enables you to search the claims records based on the serial or asset number.
Active campaigns	Displays the list of all campaigns that are in active state.
My active claims	Displays the list of active claims that are created by the logged-in user.
User Profile	Display user profile information. To learn more about user profile, see User Profile widget.

Related topics

- Dealer data model
- Dealer management

Additional features

Manufacturing Commercial Operations supports additional features to enhance the product capabilities.

Additional feature list

Feature	Description
Customer Service Management	The Customer Service Management enables you to provide the service and support that your external customers need. For example, your customers can communicate and receive support through the web, email, chat, telephone, and social media.
Order to cash operations	Optimize the lead-to-cash cycle with Order to cash operations for Manufacturing Commercial Operations With Order to cash operations for Manufacturing Commercial Operations, manufacturers can:

Additional feature list (continued)

Feature	Description
	• Launch complex products and services with configurable catalogs. • Manage leads & opportunities from start to finish and map customer needs to the best offers. • Configure and price quotes and convert to orders to speed up revenue. • Automate order fulfillment across front, middle, and back-office teams. • Manage post-sale changes, upgrades, and renewals.
Service Exchange	Securely build business workflows across the ServiceNow® ecosystem using Service Exchange. With Service Exchange for Manufacturing Commercial Operations, manufacturers can: • Improve the enterprise experience with one service catalog for internal and provider requests. • Increase revenue with easy catalog and offerings, publishing, and order capturing. • Reduce errors by dynamically pulling field choices from the provider's ServiceNow® instances. • Keep integration costs and efforts low with a configurable and an out-of-box approach.
Channel Support Operations	With Channel Support Operations for Manufacturing Commercial Operations, you can: • Automate after-sales support processes (for example, product & service issues, warranty claims, recalls) • Save costs by resolving poor quality, non-conformance, and warranty issues • Provide tech support agents with a 360° view of customers, products, entitlements, and channels • Increase deflection with tailored self-service portal and workspace • Improve OEM-channel collaboration with proactive communications and automated channel workflows (for example, vehicle handover, service delivery)

Related topics

- Customer Service Management
- Order management
- Service Exchange
- Components installed with additional plugins

Configure

Set up Manufacturing Commercial Operations to enable manufacturers to manage the end-to-end life-cycle of your manufacturing products.

Installing and configuring Manufacturing Commercial Operations applications

With admin role, when you activate the Manufacturing Commercial Operations application [sn_dealer_mgmt], the Plugins installed with MCO plugins are automatically installed.

To learn how to install and configure Manufacturing Commercial Operations applications plugins, see Getting started.

As a user with the admin role, complete the following main configuration tasks to set up your Manufacturing Commercial Operations application.

MCO configuration tasks

Configuration task	Description
Install Customer Service Management for MCO (Mandatory)	Install the Customer Service Management application from the ServiceNow Store store. This application enables your agents and account executives to gain visibility into the customer systems and tools they must deliver to customers.
Install Order Management for MCO (Mandatory)	Install the Order to cash operations application from the ServiceNow Store. This application enables your agents to capture, manage, and fulfill orders from enterprise customers.
Getting started (Mandatory)	Install the Order Management application from the ServiceNow Store.
Service Model Foundation (Mandatory)	Install the Service Model Foundation application from the ServiceNow Store store. This framework enables you to create structured and flexible data models that represent your business needs.
Install Base Management (Mandatory)	Install the Install Base Management application from the ServiceNow Store store. This application enables you to capture a customer's use or purchase of a product with the Manufacturing Commercial Operations application.

MCO configuration tasks (continued)

Configuration task	Description
Install Service Bridge for Providers and Consumers (Optional)	See Install Service Exchange for Providers.

- Work with an implementation specialist to streamline your manufacturing setup process. To learn more, see the Customer Success Center.
- Join the ServiceNow® Manufacturing Community to share knowledge, collaborate, and network with peers around the globe who are addressing the same industry challenges and opportunities.

Set up your environment

Begin your customer journey by preparing your Manufacturing Commercial Operations environment with data models, customer data, product data, user management, and case management tools to go live.

List	Description
Getting started	Install Manufacturing Commercial Operations.
Set up additional requirements	Set up additional Manufacturing Commercial Operations requirements.

Getting started

Activate the Manufacturing Commercial Operations plugin and plan your implementation by installing additional plugins.

Activating plugins

Plugin	Description
Install MCO	As an admin, activate the MCO plugin. This plugin includes demo data and activated related plugins.
Plugins installed with MCO	Refer to the list of related MCO plugins that are activated after you activate the MCO plugin.

Install MCO

Install the Manufacturing Commercial Operations Core application with the admin role. The application includes demo data Manufacturing Commercial Operations core and installs related ServiceNow® store applications and plugins that aren't already installed.

Before you begin

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

Role required: admin

About this task

The following items are installed with Manufacturing Commercial Operations:

- Roles
- Tables
- Plugins
- ServiceNow Store applications

The Manufacturing Commercial Operations Core application is dependent on the Product Catalog Management Core, CIWF UI components, and Industry Core applications.

To review all the plugins that are activated by installing the Sales promotion management, Manufacturing recall management, and Manufacturing repair management, see Plugins installed with MCO.

For more information on the components, see Components installed.

Procedure

1. Navigate to **All** > **System Application** > **All Available Applications > All.**.
2. Find the Manufacturing Commercial Operations Core application using the filter criteria and search bar.

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

   - Sales promotion claim management [sn_sls_prm_clm_mgt]
   - Manufacturing repair claim management [sn_repr_claim_mgmt]
   - Manufacturing recall claim management [sn_rcl_claim_mgmt]
   - Remediation Core (com.sn_rm_core)
   - Manufacturing Quality Management (com.sn_mfg_qm)

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. Select **Install**.

Plugins installed with MCO

With the ServiceNow® Manufacturing Commercial Operations main plugin, you can install all the dependent plugins that a customer is entitled to with Manufacturing Commercial Operations.

The following table lists the Manufacturing Commercial Operations plugins that are installed with the Manufacturing Commercial Operations plugin.

Manufacturing Commercial Operations Plugins

Feature	Plugins	Description
Manufacturing Core	Manufacturing Core [sn_mfg_cmn]	Manage and maintain common components for MCO.
Claim Common	Common Claim [sn_claim_cmn]	Manage all entities related to Base Claims within MCO.
Dealer Portal	Manufacturing dealer management [sn_dealer_mgmt]	Manage all the entities related to dealer management within MCO.
Sales Promotions and Claims	Sales promotion management [sn_sales_prm_mgmt]	Manage all the entities and flows related to sales promotion within MCO.
Sales Promotions and Claims	Sales promotion claim management [sn_sls_prm_clm_mgt]	Manage all the entities and flows related to Sales Promotion Claims within MCO.
Sales Promotions and Claims	Sales promotion claim management advanced [sn_sls_prm_clm_adv]	Provides playbook experience and manages workflows and all major functionalities related to Sales Promotion Claims within MCO.
Warranty Claims	Manufacturing labor common [sn_labr_cmn]	Manage all the entities related to labor management within MCO.
Repair Claims	Manufacturing repair claim management advanced [sn_rep_clm_mgt_adv]	Provides playbook experience and manage workflows and all major functionalities related to Repair Claims within MCO.
Warranty Claims	Manufacturing repair claim management [sn_repr_claim_mgmt]	Manage all the entities and flows related to Repair Claims within MCO.
Recall Campaigns and Claims	Manufacturing recall claim management [sn_rcl_claim_mgmt]	Manage all entities and flows related to Recall Campaigns and Claims within MCO.
Remediation Core	Remediation Core [com.sn_rm_core]	Enables organizations to systematically identify root causes, plan and execute remediation actions, and track the cost of poor quality (CoPQ) to enhance improved accountability, efficiency, and continuous improvement.

Manufacturing Commercial Operations Plugins (continued)

Feature	Plugins	Description
Manufacturing Quality Management	Manufacturing Quality Management [com.sn_mfg_qm]	Helps to identify product issues, create quality investigations to perform root cause analysis, and implement corrective and preventive actions (CAPA) to resolve issues and prevent recurrence.

Configure responsibility access

The declarative responsibility framework in Manufacturing Commercial Operations (MCO) is used to define and update responsibilities and access levels. The framework enables you to use low-code or no-code tools, which reduces the time required for scripting.

The Responsibility Access Configuration MCO table is used to store the metadata of the responsibility access configuration. With this configuration, you can enable different levels of access for related party users across different records of the same entity.

Granular roles and entities

Module-level granular roles have been added to facilitate defining and configuring the responsibility framework. These roles enable tasks to be performed without creating custom access control lists (ACLs) on the target table when a responsibility ACL exists. This update aims to provide a more direct and declarative migration process.

Granular roles and related entities

The granular role provides Create, Read, and Update (CRU) access across entities, based on the access permissions defined for each responsibility.

Granular roles	Description
Recall Claim Management Creator [sn_rcl_claim_mgmt.campaign.creator]	View, write, and create Recall Campaign tables.
Recall Claim Management Viewer [sn_rcl_claim_mgmt.campaign.viewer]	View all Recall Campaign tables.
Recall Claim Management Writer [sn_rcl_claim_mgmt.campaign.writer]	View and write all Recall Campaign tables.
Campaign Phase Writer [feature role] [sn_rcl_claim_mgmt.campaign_phase.writer]	Read access on all Recall Campaign related tables. It has write access on Recall Campaign Phase, Impacted Finished Good & Phase Task tables. It has create access on Phase Task and Impacted Finished.
Pre-authorization admin [sn_repair_claim_mgmt.repair_pre_auth_admin]	Create, update, and delete the pre-authorization request.
Repair Claim Management Viewer [sn_repair_claim_mgmt.repair_pre_auth_viewer]	View all Repair Claim Pre-authorization tables.
Pre-authorization navigator [sn_repr_claim_mgmt.pre_auth_navigation_menu]	Access to related list menu for pre-authorization in workspace.

Granular roles and related entities

The granular role provides Create, Read, and Update (CRU) access across entities, based on the access permissions defined for each responsibility.

(continued)

Granular roles	Description
Warranty specialist [sn_claim_cmn.warranty_specialist]	View and update pre-authorization request. Also, can view Repair claim. This role is for user who can approve/reject/send-back pre-authorization request.

Granular roles and supported entities

Granular roles are designed based on feature sets and can be used to provide access to supported tables or entities though the responsibility framework.

Feature set	Granular roles	Supported entities
Recall campaign	sn_rcl_claim_mgmt.campaign.creator sn_rcl_claim_mgmt.campaign.viewer sn_rcl_claim_mgmt.campaign.writer sn_rcl_claim_mgmt.campaign_phase.writer	sn_rcl_claim_mgmt_ca Corrective action charges sn_rcl_claim_mgmt_ca_charges sn_rcl_claim_mgmt_rcp sn_rcl_claim_mgmt_phase_task sn_rcl_claim_mgmt_rcp_phase
Recall campaign phase	sn_rcl_claim_mgmt.campaign_phase.writer sn_rcl_claim_mgmt.campaign.viewer	sn_rcl_claim_mgmt_rcp_phase sn_rcl_claim_mgmt_phase_task

System roles containing granular responsibility roles

System roles and related granular roles

System roles	Granular roles
Recall Manager [sn_rcal_claim_mgmt.recall_manager]	sn_rcl_claim_mgmt.campaign.creator sn_rcl_claim_mgmt.campaign.viewer sn_rcl_claim_mgmt.campaign.writer sn_rcl_claim_mgmt.campaign_phase.writer
Recall Phase Owner [sn_rcl_claim_mgmt.recall_phase_owner]	sn_rcl_claim_mgmt.campaign_phase.writer sn_rcl_claim_mgmt.campaign.viewer
Warranty Specialist [sn_claim_cmn.warranty_specialist]	financial_mgmt_user sn_customerservice_agent

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System roles and related granular roles (continued)

System roles	Granular roles
	sn_dealer_mgmt.dealer_viewer sn_mfg_cmn.navigation_menu sn_prd_pm.product_catalog_viewer sn_prm.enterprise_partner_agent sn_repr_claim_mgmt.claim_viewer sn_repr_claim_mgmt.navigation_menu sn_repr_claim_mgmt.pre_auth_navigation_menu sn_repr_claim_mgmt.repair_pre_auth_charge_creator sn_repr_claim_mgmt.repair_pre_auth_writer

Set up additional requirements

You can setup the additional configurations to active Customer Service Management, Order to cash operations, and Service Bridge capabilities.

List	Description
Install Customer Service Management for MCO	Customer Service Management capabilities for Manufacturing Commercial Operations are automatically installed with the MCO plugins.
Install Order Management for MCO	Order Management capabilities for Manufacturing Commercial Operations are automatically installed with MCO plugins.
Install Service Bridge for Providers and Consumers	Service Exchange capabilities for Manufacturing Commercial Operations are automatically installed with MCO plugins.

Install Customer Service Management for MCO

Set up and install your Customer Service Management environment with data models, customer data, product data, user management, and case management tools to go live.

Basic setup

Tasks	Description
Create an internal business location	Create an internal business location to enable users and consumers to create accounts, contacts, consumers, and households.
Add staff members to an internal business location	Add users as staff members to an internal business location to support accounts, contacts, consumers, and households.
Assign responsibilities	Assign responsibilities to a service organization (SO) member.

Basic setup (continued)

Tasks	Description
Assign roles	Assign roles to internal and external users to facilitate proper access to service organizations, business locations, and households.

To set up the Customer Service Management environment, see Set up your environment.

Configure the Business Portal for Manufacturing Commercial Operations

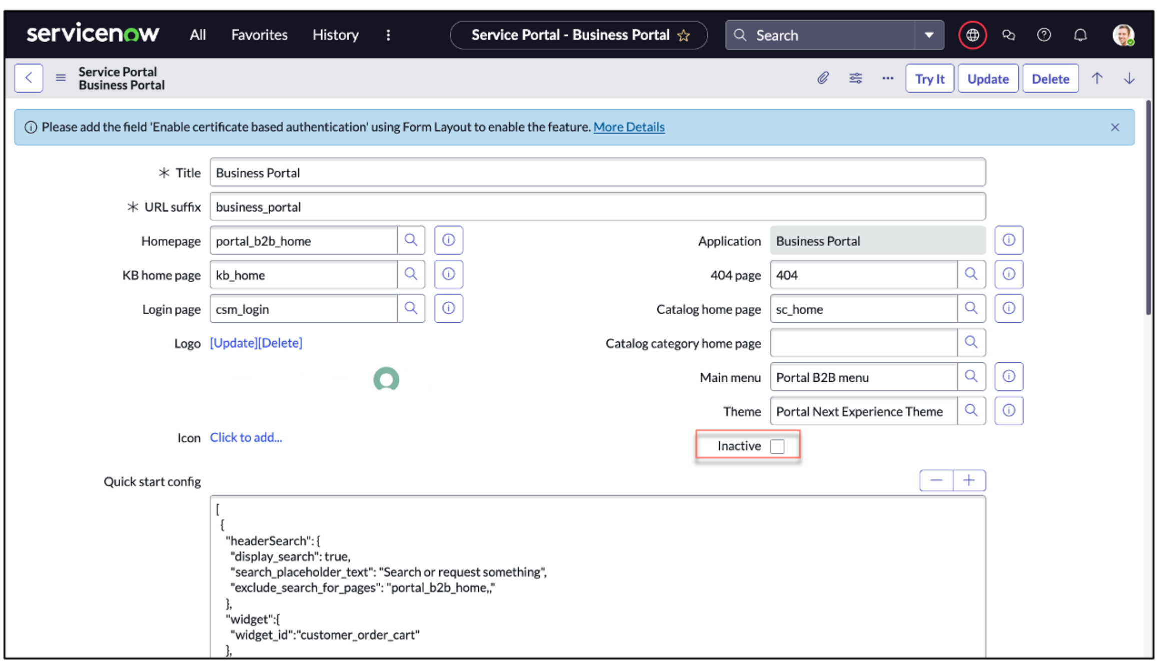
Configure the business portal to enable your customers to submit orders through self-service.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Portals** > **Portals**.
2. On the Service Portals page, in the Title column, enter `*business portal`.
3. Select **Business Portal**.
   A page opens in your instance where you can configure the Business Portal.
4. Select **Inactive**.

   Note:
   The Business Portal is inactive by default.



5. Select **Update**.

Result
The Business Portal is now active.

Install Order Management for MCO

Set up the Order Management (Order Management) applications for Manufacturing Commercial Operations to optimize the lead-to-cash cycle and allow your agents can work on various stages of the manufacturing sales life cycle, such as order and fulfillment and entitlements.

Installing and configuring Order Management applications

As a user with the admin role, complete the following main configuration tasks to set up your Order Management applications for Manufacturing Commercial Operations.

SOM configuration tasks

Configuration task	Description
Configuring Order Management	Install the Order Management application from the ServiceNow Store. This application enables your agents to capture, manage, and fulfill orders from enterprise customers.
Configuring product offerings and catalogs	Create product offerings and the associated product catalogs that can be used by Sales Customer Relationship Management (Sales CRM) agents for pre-sales activities, order capture, and post-sales engagement.
Configuring product pricing with Pricing Management application	Use the Pricing Management application to create the price lists and price list lines, define pricing adjustments, and manage other features that control pricing for product offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales CRM.

Install Service Bridge for Providers and Consumers

To set up and configure the Service Exchange for Providers application for Manufacturing Commercial Operations, follow these steps.

Note:
Service Exchange 2.x.x that is being released with the Zurich release does not support migration of the Service Exchange (Legacy) versions. If you are using a Service Bridge (Legacy) version, before you upgrade to the Zurich release, you must follow instructions in the Service Bridge for Providers (Legacy) - Migration Utility (KB1499823) to migrate your configuration data.

Set up MCO

Set up the Manufacturing Commercial Operations basic requirements.

Task	Description
Create a labor code	Provides the details to configure the labor code for the work performed by the service agents.

Task	Description
Configuring product models	Provides the details to configure the product model for each product.
Configuring assets	Provides the details to configure the assets for each account or customer.
Create an install base item	Provides the details to configure the instances for an account or customer.
Create a dealer	Provides the details to create the dealers.

Create a labor code

Define a labor code for the different tasks or work performed by the service agents.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Labor code**.
2. Select **New**.
3. On the form, fill in the fields.

   Labor code form

Field	Description
Name	Labor code name.
Active	Option to indicate if the labor code is active or not.
Description	Description for the labor code.

4. Select **Save**.

Configuring product models

A product is a type of merchandise or service that a company sells and supports. Product models identify different types of products, such as service, hardware, software, or consumables.

A product model is a specific version or configuration of a product. Build hierarchical product models that represent the set of products that your organization offers to its customers and define relationships between different product models. Define whether a product is tracked as an asset, a CI, or both. Additionally, identify or create the CI and asset classes to capture configuration information for product models.

Modify a product model

Modify a product record that your company sells and supports.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

About this task

Product models provide dealers and manufacturers with a detail of the products being used by a particular customer.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Product Models**.
2. Select a product model that you want to edit.
3. Select **Edit**.
4. On the Model form, fill in the fields.
   For a description of the field values, see Model form fields.
5. Select **Update**.

Related topics

Product data

Configuring assets

An asset is a specific product or instance that is supported for a Manufacturing Commercial Operations to manage the asset details.

Assets can have serial numbers or asset tag numbers and can be allocated to individual accounts or to a contact within an account. Assets can also have associated support contracts.

Manufacturers must have their assets details, such as:

- Where those assets are located
- Who is using those assets
- How often those assets are used
- How much those assets cost

Advanced view

You can use the Advanced view filter to filter the assets based on your requirements.

Select the filter icon or menu. Select **Advanced view**.

Select any field from the root table that you want to filter the data by.

To learn how to configure assets, see Configure assets.

Create an install base item

Create an install base item that represents the instance of the product that has been configured for a customer The install base item enables you to track all the purchases that were made by a customer.

Before you begin

Verify that the Customer Service Install Base Management plugin (com.snc.install_base) is installed.

Role required: admin

About this task

The install base items help to track instances that have been provisioned for an account or customer. An install base item can be any configuration item that has been made accessible to customers. The install base item enables you to track all the purchases that were made by a customer.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Install Base Items**.
2. Select **New**.
3. On the Install based item form, fill in the fields.
   For a description of the field values, see Install based item form.
4. Select **Save**.
   The Sold Products, Entitlements, and Cases related lists are displayed.
5. Fill out the related lists as described in the following table.

   Install base item related lists

Related list	Description
Child Install Base items	List of all child install bases that are related to the parent install base item.
Sold Products	List of the sold products that are associated with an install base Item. Edit a sold product by selecting **Edit**.
Cases	List of cases that are associated with an install base item.
Entitlements	List of entitlements that are associated with an install base item. Add an entitlement for the install base item by selecting **New**. **Note:** Customer service managers can create entitlements. Customer service agents can view entitlements.
Contracts	List of contracts that are related to an install base. Edit a contract by selecting **Edit**.

   For more information on the related lists, see Related list for an Install base item.
6. Select **Update**.

Result

The install base item is added to the account or consumer that you selected. You can select an account or consumer to see a list of all the install base items that are related to the account or consumer.

Related topics

Install base items

Related list for an install base item

In the Manufacturing Commercial Operations application, you can use the Install base related list to track information that is related to the install base hierarchy, cases, entitlements, and other entities. By using these tables, you can understand your customers' purchases and provide efficient post-sales support.

Related list	Description
Create a child install base item	List of child install base items.
Create an installed product	List of sold products associated with the install base items.
	List of entities, such as accounts, customers, or products
	List of cases raised for an account, customer, or product.
Create sold product	List of sold products.

Create a child install base item

Create a child install base item in the Manufacturing Commercial Operations application to view a list of all the cases and issues of the parent install base item.

Before you begin

Role required: admin

About this task

A child install base related list provides the information about all the child install bases of the current install base item.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Install Base Item**.
2. In the related list section of the Install base form, select an install base item and open **Child Install Base Items**.
3. Select **New.**
   The **Parent install base item** field on the new install base form is automatically filled or defaulted to the current install base selection. On the child install base form, the **Account** and, **Contact** fields are automatically filled in.
4. Select **Save**.

Create an installed product

Create an association between sold products and install base items. Installed products provide information on the instances that a sold product is deployed on.

Before you begin

Verify that the following plugins are installed:

- Customer Service Install Base Management (com.snc.install_base)
- Customer Service with Service Portfolio Management (SPM) (com.snc.csm_spm)
- Product Catalog Management Core (com.sn_prd_pm)

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Install base items** > **Installed Products**.
2. In the related list section of the Install base form, select an install base item and open **Sold product**.
3. Select **New**.
4. On the form, fill in the fields.

   Sold Product form

Field	Description
Install base item	Instance where the sold item is deployed on.
Sold product	Sold product that is deployed to the customer.

5. Select **Save**.

Create sold product

Create a sold product or an install base item for a contract. The customer contracts and entitlements application use the Sold Product Covered form to add sold products (install base items) that are covered.

Before you begin

Role required: admin

About this task

Sold products are products and components that have been sold to an account or a consumer and can have multiple contracts. An install base item is an instance of sold product that has been provisioned for an account or consumer.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Install base** > **Contracts**.
2. Select **New**.
3. On the form, fill in the fields.

   Sold Product Covered form

Field	Description
Contract	Reference number of the associated service contract.
Sold Product	Products that were sold to a customer.

Field	Description
	Note: ◦ The sold products list is filtered by the account linked to the contract or entitlement. ◦ The **Sold Product** field is automatically removed, when an install base item is added, ◦ You can add a sold product, if it isn't listed. Select **New** in the Install Base Item window. For more information, see Create a sold product.
Install Base Item	The related install base item. **Note:** ◦ The list of sold products is filtered based on the account related to the contract or entitlement. ◦ The **Install Base Item** field is automatically removed, when an install base item is added, ◦ You can add an install base item if it isn't listed. Select **New** in the Install Base Item window. For more information, see Create an install base item.
Date added	Date when the product is added to the entity.
Date removed	Date until which the product is active on the entity.

4. Select **Save**.

Set up dealer

Agents workspace enables the OEMs to create the dealers and assign the roles.

Create a dealer

As an OEM, create a dealer role.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Dealer**.
2. Select **New**.
3. On the form, fill in the fields.

Dealer form

Fields	Description
Number	Automatically generated number of the dealer. **Note:** By default, dealer numbers start with the prefix DLR.
Service Organization	Service organization that includes internal business locations or channel partners.
Business functions	Business functions of the dealer: ◦ Sales ◦ Sales and service ◦ Service only

Related topics

Assign roles

Create an internal business location

Create an internal business location to enable users and consumers to create accounts, contacts, consumers, and households.

Before you begin

Role required: admin

About this task

The manager of an internal business location can access all the cases for account, household, or consumer in the location hierarchy, including cases for child business locations. The manager can also:

- Add staff members to business locations in the location hierarchy.
- Create account team or consumer team relationships with staff members from the location hierarchy.
- View customer information.
- Update cases created in the location hierarchy.
- Create cases for customers in the location hierarchy.

Note:
Only internal users can be added as managers for internal business locations.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal Business Locations**.
2. Click **New** on the Internal Business Locations list.
3. On the Internal business location form, fill in the fields.
   For a description of the field values, see Internal business location form.
4. Click **Submit**.
   The location is added to the Internal Business Locations list.

   After creating an internal business location, you can add staff members to the location, create relationships between staff members and accounts, households, and consumers, and track the list of customers serviced by a business location.

Create a channel partner

Create a channel partner to streamline and help manage the sales process of a product or a service for an enterprise.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Partner Relationship Management** > **Channel Partners**.
2. Select **New**.
3. On the Channel partner form, fill in the fields.
   For a description of the field values, see Channel partner form.
4. Select **Save**.

Related topics

Create Channel Partner record

Adding and associating company records

Create a company record and associate it to an internal business location and channel partner.

Tasks for adding and associating company records

Task	Description
Add a new company	Create a company record that represents vendors, manufacturers, or customers with whom you do business.
Associate company records with a business location	Associate company records with a business location to indicate that a business location is a company.
Create Channel Partner record	Create and track channel partner records on the partner workspace to manage and store all information related to the channel partners

Adding staff members

Add users as staff members to a internal business location or channel partner so that they can support accounts, contacts, consumers, and households.

Add staff members to internal business location and channel partner

Task	Description
Add staff members to an internal business location	Add users as staff members to an internal business location.
Register Partner Staff on workspace	Add users as staff members to an channel partner.

Add members to an internal business location

Add users as staff members to an internal business location to support accounts, contacts, consumers, and households.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal Business Locations**.
2. Select the desired internal business locations record.
3. Open the Register Member at Internal Business Location record by selecting the **Register Member** related link.
   You can use the record to register new location staff or move existing internal or external staff between locations managed by the Location manager, and assign responsibilities to staff accordingly.
4. On the form, fill in the fields.

   Register Member at Internal Business Location form

Field	Description
Internal Business Location	Internal business location. This field is automatically generated.
Member	Internal staff member.
Member Type	Responsibility of the member selected at the business location.

5. Select **Submit**.

Result
A member record with the selected member, member type, and business location is created. After a member type is selected, the member is assigned to a responsibility automatically.

Add members to an channel partner

Register a new partner member or transfer existing staff within a partner organization.

Before you begin
Role required: admin

About this task
The Enterprise Partner Relationship Manager [sn_prm.enterprise_partner_rel_manager] of the channel partner can also register partner staff on the workspace.

Procedure

1. Navigate to the **CSM/FSM Configurable Workspace** and select the list view.
2. Select **Channel Partners** from the Partner Relationship Management module.
3. Open a channel partner record from the list and select **Register Partner Staff**.
4. On the form, fill in the fields.

Field	Description
Register staff	Whether the staff member is new or existing
Partner organization	Channel partner account to which the member is being registered.
First name	First name of the member.
Last name	Last name of the member.
User ID	Unique ID of the member.
Email	Email of the member.
Role type	Type of role that is assigned to a member, whether Partner Manager or Partner Associate.

5. Upload a file or document in the **Add attachments** section.

   This is an optional field.

6. Select **Submit**.

Assign roles

Assign roles to control access to features, capabilities, and data in the Manufacturing Commercial Operations Core application.

Before you begin

Role required: admin or sn_mfg_cmn.manufacturing_operations_admin

About this task

Procedure

Assign roles to users and groups using the ServiceNow AI Platform user administration feature.

- To assign a role to a user, see Assign a role to a user.
- To assign a role to a group, see Assign a role to a group.

Related topics

Explore Manufacturing Commercial Operations

Set up sales promotion

A sales promotion setup enables the manufacturers to configure the sales promotion details. It includes the promotion name, start and end date of the promotion, sales promotion type, and incentive details.

Task	Description
Create promotion type	Configure different promotion type that is applicable to the customers.
Create promotion questionnaire	Configure the MCO input set. Define the grouping for input attributes.
Create a checklist template	Create a checklist template applicable to user group or user.

Create promotion type

As a OEM or manufacturer, create a sales promotion type that is applicable to a specific set of promotions.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Setup** > **Promotion Types**.
2. Select **New**.
3. On the form, fill in the fields.

   Promotion Type form

Field	Definition
Name	Name of the promotion type.
Input set	MCO input set. This field contains a set of questionnaires. To create an input set, see Create promotion questionnaire.
Description	Short description of the sales promotion type.

4. Select **Save**.

Create promotion questionnaire

Create a promotion questionnaire. Configure the MCO input set.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Setup** > **Promotion Questionnaires**.
2. Select **New**.
3. On the form, fill in the fields.

MCO Input Set form

Field	Definition
Name	Name of the MCO input set.
Application	Configuration record details. You can't edit the application. **Note:** To learn more about the Application file, see Application files.

4. Select **Save**.

Create an MCO input attribute

Create the MCO input attributes for sales promotion campaign.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Setup** > **Promotion Questionnaire** > **MCO Input Attributes**.
2. Select **New**.
3. On the MCO input attributes form, fill in the fields.
   For a description of the field values, see MCO input attributes form.
4. Select **Save**.

Create a checklist template

Create a checklist template. Manufacturers can use the checklist template to create checklists for verification.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Setup** > **Checklist Template**.
2. Select **New**.
3. On the form, fill in the fields.

Checklist Template form

Field	Definition
Group	Group for which you want to create the checklist template.
User	User role for which you want to create the checklist template.
Template	Template JSON that has name and order for each checklist.

Field	Definition
Name	Template name.

4. Select **Save**.

Related topics

Create a checklist template

Use

Learn how Manufacturing Commercial Operations enables you to manage the end-to-end life-cycle of your products, subscriptions, and services.

Dealer management

The dealer portal enables you to manage the repair, recall, and sales promotion claims.

Tasks	Description
Look up an asset or claim by its serial number	View asset or claim details.
Repair claim for the dealer	Submit a repair claim for warranty and recall.
Sales promotion for the dealer	Submit a sales promotion claim.

Look up an asset or claim by its serial number

Look up the serial number of the asset or claims details in the dealer portal. View the item for recall and sales promotion claims.

Before you begin

Role required: dealer service advisor

Procedure

1. Navigate to **Dealer Portal** > **Lookup by serial number**.
2. Enter the serial number.
3. Select **Search**.
   The page displays the claim details of that particular serial number. It includes **Submitted claims**, **Active recalls**, and **Details**.
4. View the relevant details.
   - To view the claims submitted for that product or asset, select **Submitted claims**.
   - To view if any recall is performed on the asset or product, Select **Active recalls**.
   - To view the install base form view, select **Details**.

Pre-authorization request

A pre-authorization request is a process to confirm the approval before initiating activities, such as repairs, material procurement, or labor costs that are included under warranty or service agreements. This procedure confirms that all required inspections and criteria are satisfied and duly authorized by the Warranty Specialist. When a claim is created, approved pre-authorization requests will automatically generate claim jobs. This process promotes quality assurance and operational efficiency in the process.

Submit a pre-authorization request

Submit a pre-authorization request to confirm whether certain parts, fees, or repairs are covered under a warranty or service contract.

Before you begin

Role required: sn_dealer_mgmt.dealer_service_advisor

Procedure

1. Navigate to **Dealer Portal** > **Catalogs** > **Customer operations** > **Pre-authorization**.
2. On the Submit claim case form, fill in the fields.
   For a description of the field values, see Pre-authorization form.
3. Select **Continue**.
   The Pre-authorization request number is generated.
4. Select **Add claim jobs**.
5. Set **Type** as one of the following:
   - Warranty: Repair, replacement, or service that is covered under the warranty.
   - Goodwill: Repair services that may be free or discounted at the manufacturer's discretion.
6. On the Claim jobs form, fill in the fields.
   For a description of the field values, see Pre-authorization job details form.
7. Select **Save**.
8. Select **Submit**.

Result

You have successfully submitted your claim for review.

> **Note:**
> The claim is available in the Agents portal for review and approval. After the warranty advisor approves the claim, **Create claim** option is enabled. For more information on create claim, see Repair claim for the dealer.

Repair claim for the dealer

The dealer portal enables the dealers to raise a claim request for the repair work that was performed for a product. The repair could have been done either under warranty or after the recall of the product.

You can perform the following task for repair claim on the dealer portal:

Task	Description
Submit a repair claim for warranty	Submit the repair claim for the products covered under warranty.
Submit a repair claim for recall	Submit the repair claim for the sold products that are recalled by the manufacturers.

Submit a repair claim for warranty

Create a warranty claim and submit it for approval.

Before you begin
Role required: admin

Procedure

1. Navigate to **Dealer Portal** > **Catalogs** > **Customer operations** > **Repair claim**.
2. On the Claim details form, fill in the fields.
   For a description of the field values, see Claim details form.
3. Select **Continue**.
   The Claim jobs form appears.
4. Select **Add claim jobs**.
5. Set **Type** to **Warranty**.
6. On the Claim jobs form, fill in the fields.
   For a description of the field values, see Repair claim form.
7. Select **Submit**.

Result
The Claim job is successfully submitted for review and approval.

Submit a repair claim for recall

Create a recall claim and submit it for approval.

Before you begin
Role required: admin

Procedure

1. Navigate to **Dealer Portal** > **Catalogs** > **Customer operations** > **Repair claim**.
2. On the Claim details form, fill in the fields.
   For a description of the field values, see Claim details form.
3. Select **Continue**.
   The Claim jobs form appears.
4. Select **Add claim jobs**.
5. Set **Type** to `Recall`.
6. On the Claim jobs form, fill in the fields.
   For a description of the field values, see Repair claim form.
7. Select **Submit**.

Result
The Claim job is successfully submitted for review and approval.

Sales promotion for the dealer

The dealer portal enables the dealers to view the sales promotions campaign created by OEMs. Dealers can also raise a claim request on the sales promotion.

Task	Description
Submit a sales promotion claim	Submit a single sales promotion claim case.
Upload a bulk sales promotion claim	Bulk upload the sales promotion claims.

Submit a sales promotion claim

As a dealer, submit a single sales promotion claim request.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **Dealer Portal** > **Catalogs** > **Customer operations** > **Sales promotion single claim**.
2. On the form, fill in the fields.

Sales details form

Fields	Description
Asset	Asset or product on which sales promotion is applicable.
Requested by	User who is raising the sales promotion claim request.
Consumer	Customer of the sale. The consumer information is auto-populated based on the install base.
Dealer	Dealer who is raising the sales promotion claim request.
Sale Price	Sale price of the sold product for which you're raising the sale promotion claim.

3. Select **Continue**.
   The Incentive details form appears.
4. Select the incentives.
5. Enter the incentive percentage.
6. Select **Submit**.

Result

The Sales promotion claim is successfully submitted for review and approval.

Upload a bulk sales promotion claim

Upload a bulk sales promotion claim request.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **Dealer Portal** > **Catalogs** > **Customer operations** > **Sales Promotion Bulk Upload**.
2. Select **Download template**.
3. On the Sales promotion bulk upload form, fill in the fields.
   For a description of the field values, see Sales promotion bulk upload form.
4. Select **Dealer**.

5. Select **Add attachments** to upload the updated template.
6. Select **Submit**.

Agent management

The workspace portal or the agent workspace enables the OEM or the manufacturers to create, view, and approve claims.

Tasks	Description
Repair claim	The OEM can create, view, and approve repair claims.
Sales promotion management	The OEM can create sales promotion for the customers based on the required criteria.
Sales promotion claim management	The OEM can create, view, and approve sales promotion claims.

Repair claim

The Agents workspace enables the OEMs to create, view, review, and approve the repair claims.

Tasks	Description
Create a repair claim	Create repair claim case.
View a repair claim case	View the required repair claim cases.
Reviewing and approving repair claims	Different types of approval.

Create a repair claim

Create a repair claim for the products under warranty or recall.

Before you begin
Role required: Manufacturing operations admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Repair**.

   Note:
   Select any **Case** from the list.

2. Select **New**.
3. On the Claims details form, fill in the fields.
   For a description of the field values, see Claim details form.
4. Select **Continue**.
   The Claim jobs form appears.
5. Select **Add claim jobs**.
6. Set **Type** as **Warranty**.
7. On the Repair claim jobs form, fill in the fields.

For a description of the field values, see Repair claim form.

8. Select **Submit**.

Result

The claim job is successfully submitted for review and approval.

View a repair claim case

View the repair claim cases.

Before you begin

Role required: claim agent or manufacturing operations admin

Procedure

1. Navigate to **All** > **Repair Claims**.
2. Choose a list of cases to view.
    - My Cases: Cases assigned to them
    - All: Cases that belong to that business location.
    - Open: All the open cases.
    - Unassigned: Unassigned cases and assign them to the available agent.
    - Escalated: Cases that are escalated and need attention.

Reviewing and approving repair claims

Agents portal or workspace enables you to review and approve the claims submitted by a dealer.

From the Activities menu, select **Review & approve**.

Tasks	Description
Reviewing and approving repair claims	Approve all claim job expenses.
Reject all claims	Reject all claim job expenses.
Partially approve a claim	Partially approve the job claim expenses.
Send back a claim	Send back the claim for additional information.

Approve all claims

As an OEM claims agent, approve all the claim job expenses that were raised by a dealer.

Before you begin

Role required: claims agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Repair**.

    Note:
    To create and navigate to the Review & approve form, see Create a repair claim.

2. From the Activities menu, select **Review & approve**.
3. From the list, select **Approve all**.
    All the claims are approved. The Claim Summary form is displayed.

4. View the repair claim summary details by selecting **Claim Summary**.
5. Select **Submit**.
6. Add **Comment**.
7. Select **Confirm**.

Reject all claims

Rejects all the claims job expenses raised by a dealer.

Before you begin

Role required: claims agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Repair**.

   Note:
   To learn how to create and navigate to the Review & approve form, see Create a repair claim.

2. From the Activities menu, select **Review & approve** from **Activities**.
3. From the drop-down list, select **Reject all**.
   All the claims are rejected. the Claim Summary form is displayed.
4. View the repair claim summary details, select **Claim Summary**.
5. Select **Submit**.
6. Add **Comment** and **Confirm**.

Partially approve a claim

As an OEM claims agent, partially approve the claims job expenses raised by a dealer.

Before you begin

Role required: claims agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Repair**.

   Note:
   To learn how to create and navigate to the Review & approve form, see Create a repair claim.

2. From the Activities menu, select **Review & approve**.
3. From the drop-down list, select **Partially approved**.

   Note:
   You can edit the claim before approving or rejecting.

4. Process the claim in one of the follow ways.

5. View the repair claim summary details by selecting **Claim Summary**.

6. Select **Submit**.
7. Select **Comment** and **Confirm**.

Send back a claim

As an OEM claims agent, send back the claims request to the dealer for additional information.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Repair**.

   Note:
   To learn how to create and navigate to the Review & approve form, see Create a repair claim.

2. From the Activities menu, select **Review & approve**.
3. From the drop-down list, select **Send back**.

   Note:
   The Repair claim is sent back to the dealer to update the information on the claim form.

4. Select **Submit**.
5. Enter **Comment** and **Confirm**.

Recall management

Recall management enables the OEMs to identify and remove or replace the faulty products sold to the customers.

Tasks	Description
Create a campaign	Displays all the recall campaign that are assigned to the person logged in to the workspace.
View All campaigns	Displays all the recall campaign that are created by the OEM.
Create My campaign phases	Displays all the recall campaign phases that are assigned to the person logged in to the workspace.
Create a campaign phase	Displays all the recall campaign phases that are created by the OEM.

Create a campaign

Create a recall campaign and also view the list of campaigns claims assigned to the person who has logged in to the workspace.

Before you begin
Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns**.
2. Select **New**.
3. On the Recall campaign form, fill in the fields.
   For a description of the field values, see Recall campaign form.
4. Select **Save**.
   The recall campaign record is created.

   The following actions are displayed:

   - Import Impacted Assets: To import impacted assets, refer Importing impacted assets
   - Initiate Recall Campaign: To change the recall campaign state from draft to in-progress, you must have atleast one corrective action marked as In use. Only then can the campaign progress beyond the draft stage.
   - Cancel Campaign: To cancel the recall campaign.

   .

What to do next

1. Create Corrective actions.
2. Create Corrective action charges.
3. Select **Initiate Recall Campaign** to enable Recall Campaign Phases and Phase & Sub-phases.

Importing impacted assets

Recall campaign management enables you to import the impacted assets.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns**.
2. Choose the recall campaign record where you want to import the affected asset.
3. Select **Import Impacted Assets**.
4. On the form, fill in the fields.

   importing impacted assets form

Fields	Description
Import set table	Select Existing table. Choose sn_rcl_claim_mgmt_impacted_asset_import table from the option.
Source of the import	Select the source of import from the option: ◦ File ◦ Data source

5. Select **File**.

6. Select **Choose file**.
7. Choose Import Impacted Assets Template.
   The template consists of Serial number and Recall campaign number.

   Serial numbers help manufacturers and dealers identify products, track assets, handle claims, and manage recalls or promotions throughout a product's life-cycle. For a vehicle, VIN (Vehicle Identification number) will be its serial number.

   If the install base item or the asset record is missing, the import process throws an error for that serial number.
8. Select **Open**.
9. Select **Submit**.
   The impacted assets data is uploaded.
10. Select **Run Transform**.

    Note:
    Transform job should be run. If it isn't set to run automatically, perform manually.
11. Select **Transform**.
12. Select **Transform History**, to view logs.

Related lists for my campaigns

In the workspace, you can use the My campaign related list to track information that is related to the campaign tasks, corrective action, and recall phases.

Related list	Description
Campaign tasks	Plan, identify, and execute a recall promotion campaign.
Corrective actions	Action taken to rectify the issue raised for a sold product.
Create an impacted asset	Identify the asset impacted for a recall or repair action.
Recall a campaign phase	Recall campaigns created for a specific geography or for a dealership.
Create a phase and sub-phase in a recall campaign	Phases and sub-phases within a recall campaign enables detailed segmentation, improving tracking, and management at each stage of the process.

Campaign tasks

As an OEM, plan, manage, and execute a promotional effort.

Before you begin
Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Campaign Tasks**.
2. Select **New**.
3. On the Campaign tasks form, fill in the fields.
   For a description of the field values, see Campaign tasks form.
4. Select **Save**.

Corrective actions

Corrective action enables you to address the asset issue, either by eliminating or replacing the asset.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns**.
2. Select the corresponding campaign record in which you want to import the impacted asset.
3. Select **Corrective Actions**.
4. Select **New**.
5. On the corrective action form, fill in the fields.
   For a description of the field values, see Corrective action form.
6. Select **Save**.
   Ready to use option is displayed.

   Note:
   Atleast one "In use" corrective action is required to initiate the recall campaign to In-progress.

   Corrective action must contain atleast one action charge line to move it to In use.

Corrective action charges

Create correction action charges to enable the expenses incurred to address a non-conformance and implement measures to help prevent its recurrence.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Corrective Actions** > **Corrective Action Charges**.
2. Select **New**.
3. On the corrective action charges form, fill in the fields.
   For a description of the field values, see Corrective action charges form.
4. Select **Save**.

Ready to use option is displayed.

Note:
At least one "In use" corrective action is required to initiate the recall campaign to In-progress.

Create an impacted asset

Identify an impacted asset that must be replaced or recalled.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Impacted asset**.
2. Select **New**.
3. On the form, fill in the fields.

impacted asset form

Fields	Description
Recall campaign	Name of the recall campaign.
Recall campaign phase	Recall campaign phase that you want to recall.
Repair claim case	Repair claim case number.
Asset	Asset that you want to recall.
Install base	Install base item.

4. Select **Save**.

Recall a campaign phase

Create a recall campaign for a specific geography or a dealership.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Recall Campaign Phases**.
2. Select **Create phase**.
3. On the required recall campaign form, fill in the fields.
   For a description of the field values, see Recall campaign phase form.
4. Select **Save**.

Assign an impacted asset

Assign an impacted asset to the recall campaign.

Before you begin
Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Recall Campaign Phases**.
2. Select **Assign**.
3. Select the asset from the list.
4. Select **Assign**.

Adding a phase task

Agents workspace enables the manufacturers to add the phase task details for the recall campaigns.

Before you begin
Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaign** > **Recall Campaign Phases** > **Phase tasks**.
2. Select **New**.
3. On the Phase task form, fill in the fields.
   For a description of the field values, see Phase task form.
4. Select **Submit**.

Recall a campaign sub-phase

Create a sub-phase for a parent phase.

Before you begin
Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Recall Campaign Phases**.
2. Select **Create Sub-phase**.
3. On the recall campaign phases form, fill in the fields.
   For a description of the field values, see Recall campaign phase form.

Assign or unassign impacted assets

Create a impacted asset list and assign or unassign it to a phases or sub-phases.

Before you begin
Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Impacted asset**.
2. Select **New**.

3. On the form, fill in the fields.

Assign or unassign an impacted asset form

Fields	Description
Recall campaign	Name of the recall campaign.
Recall campaign phase	Recall campaign phase that you want to recall.
Repair claim case	Repair claim case number.
Asset	Asset to assign or unassign to a phase or sub-phase.
Install base	Install base item.

4. Select **Save**.

Create a phase and sub-phase in a recall campaign

Create a set of phases and sub-phase within a recall campaign to enable detailed segmentation, improving tracking, and management at each stage of the process.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns**
2. Select the corresponding campaign record in which you want to create the phases and sub-phases.
3. Select **Phases & Sub-phases**.
   The page displays the following:
   - Total impacted assets: The total number of impacted assets associated with the campaign.

     For example: Total impacted assets = campaign assets (which includes phase assets + sub-phase assets).

   - Assigned impacted assets: The total number of impacted assets in a given leaf-level phase or sub-phase.

     For example, assigned impacted assets = phase assets (leaf) + sub-phase assets (leaf).

   - Unassigned impacted assets: The total number of impacted assets that are associated with phases or sub-phases that aren't at the leaf-level.

     For example: Unassigned impacted assets = phase assets (non-leaf) + sub-phase assets (non-leaf).

   Note:
   Unassigned assets on a parent phase are the assets that are assigned to the parent phase but not to any leaf phase.

4. Select **Add phase**.

5. On the required recall campaign phase form, fill in the fields.
   For a description of the field values, see Recall campaign phase form.
6. Select **Save**.

Related list for phases & sub-phases

Related list	Description
Assign an impacted asset	Assign an impacted asset to the recall campaign.
Adding a phase task	Agents workspace enables the manufacturers to add the phase task details for the recall campaigns.
Recall a campaign sub-phase	Create a sub-phase for a parent phase.

7. Add a sub-phase by selecting the plus icon (+).
   The Recall Campaign Phase window is displayed.
8. On the recall campaign phases form, fill in the fields.
   For a description of the field values, see Recall campaign phase form.
9. Select **Submit**.

View All campaigns

View a recall campaign using the All campaigns form.

Before you begin

Role required: admin

Procedure

1. **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **All Campaigns**
2. Select **New**
3. For information on how to create recall campaigns, see Create a campaign.

Create My campaign phases

Display the claims assigned to the person who has logged in to the workspace.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

Procedure

1. **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **All Campaigns**

   Note:
   A recall campaign must be in an In-progress state before creating a recall campaign phases.

2. Select **New**, to Create a campaign.
3. Select the corresponding campaign record in which you want to create phases and sub-phases.

4. On the Recall campaign phases form, fill in the fields.
   For a description of the field values, see Recall campaign phase form.
5. Select **Save**.

Create a campaign phase

Create a recall campaign phase claim assigned to those logged in to the workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **All Campaigns** > **All Campaign phases**.
2. Select **New**.
3. Create a recall campaign phase by referring to Create My campaign phases.

Merge two or more phases

Merge phases and sub-phases to reorganize and transfer assets.

Before you begin
Role required: sn_rcl_claim_mgmt.recall_manager and sn_rcl_claim_mgmt.recall_phase_owner

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns**.
2. Select the Recall campaign phase and open it in details view.
3. Select **Merge and Cancel phase**.

   All the active campaign phases that are in either the Draft state or Pre-launched state can be merged.

   The Merge assets to another phase & cancel current phase window appears.
4. From the list, select **Move assets to phase or sub-phase**.
5. Select **OK**.

   Note:
   Only phases or sub-phases without child phase can be merged.

Result
The current phase or sub-phase state is canceled, and all associated assets are transferred to the target phase.

Sales promotion

To be updated

Sales promotion management

The Agent workspace enables the OEMs to create the promotion campaign for a specific set of customers.

Tasks	Description
Create a promotion	Displays all the sales promotion claims that are assigned to the person logged in to the workspace.
View all promotions	Displays all the sales promotion claims.

Create a promotion

Create a sales promotions campaign. OEM agent can view all the sales promotion campaign created by them.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Management** > **My Promotion**.
2. Select **New**.
3. On the My Promotion form, fill in the fields.
   For a description of the field values, see My promotions form.
4. Select **Save**.
5. Select **Create checklist**.
   For further instruction, see Create a checklist template.
6. Select **Publish**.
   Changes to the promotion aren't allowed after published.

What to do next

To reuse the sales promotion details, select **Copy**.

Create a checklist template

Agents workspace enables the manufacturer to create a checklist for verification.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Management** > **My Promotion**.
2. Select **Create checklist**.
   The Create a checklist template appears.
3. Enter the **Name** of the checklist template.
4. Work on the checklist as needed.

- To add a checklist item, select **Add checklist item**.

  Note:
  These checklist items are displayed on the case line.

- To delete a checklist item, select

5. Select **Create**.

Result

A checklist template is created.

What to do next

To duplicate a checklist, do the following:

1. Select **Edit checklist**.
2. Select **Duplicate**.

Related topics

Create a checklist template

Related list for My promotions

In the workspace, you can use the My Promotions related list to track information that is related to the applicable product, visibility criteria, and sales promotion.

Related list	Description
Create an applicable product	Create an applicable product.
Create a visibility criteria	Create a visibility criteria.
Create a sales promotion claim case	Create a sales promotion claim case

Create an applicable product

Create an applicable product. An applicable product specifies the products to which the sales promotion is applied.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Management** > **My Promotions** > **Applicable Product**.
2. Select **New**.
3. On the form, fill in the fields.

Applicable products form

Fields	Description
Applicable product table	The applicable product table on which the condition is applied.

Fields	Description
Applicable product condition	Required condition builder for the applicable product table.
Sales promotion	The sales promotion reference for applicable products table.

4. Select **Save**.

Create a visibility criteria

Create a visibility criteria so that a manufacturer can filter the dealer name for which the target sales promotion is applicable.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or sales promotion manager (sn_sales_prm_mgmt.sales_promotion_manager)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Management** > **My Promotions** > **Visibility Criteria**.
2. Select **New**.
3. On the form, fill in the fields.

Visibility criteria form

Fields	Description
Sales promotion	Sales promotion for the visibility criteria.
Condition	Required service organization condition. To learn more about the Service Organization Criteria, see Create the criteria for a service organization.

4. Select **Save**.

Related topics

Associate service organizations with a service

Create a sales promotion claim case

Create a sales promotion claim case to claim the reimbursement or discount.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Management** > **My Promotions** > **All Claims**.
2. Select **New**.

3. On the form, fill in the fields.

Sales promotion claim case form

Field	Description
Asset	Asset for the claim.
Requested by	Logged-in user or member of the logged-in user's service organization.
Consumer	Consumer tagged to install base.
Dealer	Business location.
Sale price	Sale price of the product sold. Select the required currency from the list

View all promotions

As an OEM agent, view all the promotions that you created.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales Promotion Management** > **My Cases**.
2. Select **New**.
3. On the My Promotion form, fill in the fields.
   For a description of the field values, see All promotion form.
4. Select **Save**.
5. Select **Create checklist**.
   To learn how to create checklist, see Create a checklist template.
6. Select **Publish**.

   Note:
   Copy enables you to copy the sales promotion details.

Sales promotion claim management

The Agent workspace enables the OEMs to create, manage, and approve the promotion campaign for a specific set of customers.

Tasks	Description
Create a sales promotion claim case	Create a sales promotion claim case.
View sales promotion claim cases	View all the sales promotion claim cases.
Approve all claims	Different types of approval.

Create a sales promotion claim case

Create a sales promotion claim case.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or dealer sales agent (sn_dealer_mgmt.dealer_sales_agent)

Procedure

1. Navigate to **All** > **Sales Promotion Claim Management** > **All**.
2. Select **New**.
3. On the form, fill in the fields.

Sales details form

Fields	Description
Asset	Asset for the claim.
Requested by	Logged in user or member of the logged in user's service organization.
Consumer	Consumer tagged to install base.
Dealer	Business location.
Sales price	Sale price of the product sold. Select the required currency from the list

4. Select **Continue**.
5. On the form, fill in the fields.

Incentive details form

Fields	Description
Select incentives	Select the applicable promotion, fill claimed amount, and the other required fields.

6. Select **Continue**.
7. Process the claim in one of the following ways.

Related topics

Use the Activity Stream

View sales promotion claim cases

View the sales promotion claim cases.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **All** > **Sales Promotion Claim Management**.
2. Select the list that you want to view.

- My Cases: Cases assigned to the agents.
- All: All the cases that belong to that business location.
- Open: All the open cases.
- Unassigned: Unassigned cases and assign them to the available agent.
- Escalated: Cases that are escalated and need attention.

Reviewing and approving the sales promotion claims

Agents workspace enables a claims agent to review and approve the sales promotion claims submitted by the dealer.

Approve all claims	Approve each claim case line.
Reject a claim	Reject each claim case line.
Partially approve a claims	Partially approve the claim case line.

Note:
Review and approve activity is visible to the claims agent. All other activities are performed by the dealer sales agent.

Approve all claims

As an OEM claims agent, approve all the claim request raised by the dealer.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales promotion**.

   Note:
   To create and navigate to the Review & approve form, see Create a sales promotion claim case.

2. From the Activities menu, select **Review & approve**.
3. Select the check icon (✓).
4. Add **Notes**.
   All the claims are approved and **Claim Summary** activity is displayed.
5. Select **Complete**.
6. View the sales promotion claim summary details by selecting **Claim Summary**

Reject a claim

Reject a claim that was raised by the dealer.

Before you begin
Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales promotion**.

   Note:
   To learn how to create and navigate to the Review & approve form, see Create a sales promotion claim case.

2. From the Activities menu, select **Review & approve**.
3. Reject the claims by selecting the reject icon (X).
4. Add **Notes**.
5. Select **Complete**.
6. View the sales promotion summary details by selecting **Claim Summary**.

Partially approve a claims

Partially approve a sales promotion claim by updating the approved amount, which is less than the claimed amount.

Before you begin

Role required: manufacturing operations admin (sn_mfg_cmn.manufacturing_operations_admin) or claims agent (sn_claim_cmn.claims_agent)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Sales promotion**.

   Note:
   To learn how to create and navigate to the Review & approve form, see Create a sales promotion claim case.

2. From the Activities menu, select **Review & approve**.
3. Set the **Claim amount** to the number that you want to approve.
4. Add **Notes**.
5. Select **Complete**.
   The sales promotion claim is partially approved.
6. View the sales promotion summary details by selecting **Claim Summary**.

Pre-authorization requests

Dealer Service advisors submit pre-authorization requests to verify warranty or service contract coverage for parts or charges. The Warranty Specialist reviews and either approves, rejects, returns, or partially approves the request. Approved requests are used by advisors to create repair claims or link them to relevant jobs.

Create a pre-authorization request

Create a pre-authorization request to check if certain parts or charges are covered under warranty or service contracts.

Before you begin

Role required: sn_claim_cmn.warranty_specialist

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Pre-authorization requests** > **All**.
2. Select **New**.
3. On the Create New Pre Authorized Repair Request form, fill in the fields.
   For a description of the field values, see Pre-authorization form.
4. Select **Continue**.
5. Select **Job details**.
6. Select **Add claim jobs**.
7. Set **Type** as one of the following:*WarrantyGoodwill*.
   - Warranty: Repair, replacement, or service that is covered under the warranty.
   - Goodwill: Repair services that may be free or discounted at the manufacturer's discretion.
8. On the Repair claim jobs form, fill in the fields.
   For a description of the field values, see Pre-authorization job details form.
9. Select **Save**.
10. **Optional:** If you need to add additional claims, select **Add claim job**.
11. Select **Submit**.
    The Pre-authorization in review window is displayed.
12. Select **Pre-authorization review**, and then either approve, reject, or return the request.
    For more information on pre-authorization review tasks, see Review and approve a pre-authorization request.
13. Select **Assign to me** to assign the case to yourself.

Review and approve a pre-authorization request

Review and approve the pre-authorization request submitted by a dealer.

Before you begin

Role required: sn_claim_cmn.warranty_specialist

Procedure

1. Select **Review & approve jobs**.
2. From the list, select one of the following tasks.

3. Select **Submit.**
4. Enter **Submit claim** comments.
5. Select **Confirm**.

Product non-conformance

The Agents workspace enables you to create and view the product non-conformance cases.

Create a Product non-conformance

Create a non-conformance case for the products that have issue.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case**.
2. Select **New**.
3. On the Product Non-conformance Case form, fill in the fields.
   For a description of the field values, see Product non-conformance case form.
4. Select **Save**.

   Note:
   If there are multiple non-conformance for a particular **Complaint type**, then the resolver can Create Product quality investigation.

Related lists for Non-conformance

In the workspace, you can use the product non-conformance related list to log the report.

Related list	Description
Product non-conformance case task	Create Non-conformance case task that had issue.
Root cause analysis task	Create root cause analysis of the case.
Correction actions	Create corrective actions.
Containment actions	Create containment actions.
Task SLA	Create task SLA.
Relationships	It is used to track similar or duplicate product non-conformance case.

Product non-conformance case task

Create the non-conformance case task report for products that had an issue.

Before you begin

Role required: Quality Issue Management Admin or Product Non-conformance Triager (sn_mfg_qm.product_non_conformance_case_triager)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Product Non Conformance Case Task**.
2. Select **New**.
3. On the Product Non-conformance Case task form, fill in the fields.
   For a description of the field values, see Product non-conformance case task form.
4. Select **Save**.
   Notes is displayed.
5. On the Product Non-conformance Case task form, fill in the Notes fields.
   For a description of the field values, see Product non-conformance case task form.

6. **Optional:** Select **Discuss**.
   The Start a Sidebar discussion window is displayed.

   (Optional) For a description of the field values, see Discuss form.

   - Select **Start discussion**.
   - Select **Start private discussion**.
7. Select **Save**.

Root cause analysis task

Create root cause analysis (RCA) to identify the underlying cause of an issue and implement effective, long-term solutions.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Root Cause Analysis Task**.
2. Select **New**.
3. On the Root Cause Analysis Task form, fill in the fields.
   For a description of the field values, see Root cause analysis task form.
4. Select **Save**.
5. **Optional:** Select **Discuss**.
   The Start a Sidebar discussion window is displayed.

   (Optional) For more information on the sidebar discussion window, see Create a Sidebar discussion for a record.
6. Select **Save**.

Related topics

Notes form

Resolution information form

Task cause associations

Create the task cause for the root cause analysis of the product non-conformance.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Root Cause Analysis Task** > **Task Cause Association**.
2. Select **New**.
3. On the Task Cause Association form, fill in the following fields.

Field	Description
Issue	Select the issue record number.
RCA	Select the RCA record for which this task is being created.
Cause	Select the cause of the issue.
Type	Choose the type option: ◦ Possible ◦ Probable ◦ Root cause ◦ Contributing factor

4. Select **Save**.

Correction actions

Create the correction actions for the non-conformance report.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Correction Actions**.
2. Select **New**.
3. On the Correction actions form, fill in the fields.
   For a description of the field values, see Correction actions form.
4. Select **Save**.
5. **Optional:** Select **Discuss**.
   The Start a Sidebar discussion window is displayed.

   (Optional) For more information on the sidebar discussion window, see Create a Sidebar discussion for a record.
6. Select **Save**.

Related topics

Notes form

Resolution information form

Effectiveness form

CoPQ expense line

Create CoPQ (Cost of Poor Quality) expense line enables you to capture the actual costs incurred due to poor quality—Such as rework, scrap, warranty claims, customer returns.

Before you begin
Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Correction Actions** > **CoPQ Expense Line**.
2. Select **New**.
3. On the CoPQ Expense Line form, fill in the fields.
   For a description of the field values, see CoPQ expense line form.
4. Select **Save**.

Impacted asset action

Create the list of assets the are impacted under non-conformance cases.

Before you begin
Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Correction Actions** > **Impacted Asset Action**.
2. Select **New**.
3. On the CoPQ Expense Line form, fill in the fields.

Field	Description
Impacted asset	Select the asset that is experiencing an issue.
Remediation action	Select the remediation action.

4. Select **Save**.

Containment actions

Create a containment action report to address issues such as non-compliance and process gaps.

Before you begin
Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Containment Action**.
2. Select **New**.
3. On the Containment Action form, fill in the fields.
   For a description of the field values, see Containment action form.
4. Select **Save**.
   The CoPQ expense line and Impacted asset action forms are displayed.

Related topics

- Notes form
- Resolution information form
- Effectiveness form

Task SLA

Create one or more Service Level Agreement (SLA) definitions and use them to create an SLA record. This SLA record enables you to use an SLA system for your organization's task.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Task SLAs**.
2. Select **New**.
   For detailed information on Task SLA, refer Create an SLA definition.

Related topics

- Create SLA breakdown definitions

Relationships

Create the relationship between parent and child and assign the type of relationship.

Before you begin

Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case** > **Relationships**.
2. Select **New**.
3. On the Relationships form, fill in the following fields.

Field	Description
Parent	Select the record to assign as parent.
Child	Select the record to assign as child.
Type	Select the type of relationship between the parent and child.

4. Select **Save**.
   The CoPQ expense line and Impacted asset action forms are displayed.

View a product non-conformance

View the product non-conformance reports.

Before you begin
Role required: Quality Issue Management Admin or product non-conformance submitter (sn_mfg_qm.product_non_conformance_submitter)

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Non Conformance Case**.
2. Choose a list of cases to view.
   - My Cases: Cases assigned to them
   - All: Cases that belong to that business location.
   - Open: All the open cases.
   - Unassigned: Unassigned cases and assign them to the available agent.

Product quality investigation

The Agents workspace enables you to create and view the product quality investigation cases.

Create Product quality investigation

Create a product quality investigation report.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Quality Investigation**.
2. Select **New**.
3. On the Product Quality Investigation form, fill in the fields.
   For a description of the field values, see Product quality investigation form.
4. Select **Save**.

Related topics

Notes form

Related list for quality issues

In the workspace, you can use the product quality issues related list to log the report.

Related list	Description
Product quality investigation task	Create the product quality investigation task case.
Stakeholders	Create a list if stakeholders.
Containment actions	Create containment actions.
Root cause analysis task	Create root cause analysis of the case.
Corrective action	Create corrective actions.
Preventive action	Create preventive action.

Related list	Description
View a product non-conformance	View the product non-conformance case details.

Product quality investigation task

Create the non-conformance case task report for products that had an issue.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Quality Investigation** > **Product Quality Investigation Task**.
2. Select **New**.
3. On the Product Quality Investigation Task form, fill in the fields.
   For a description of the field values, see Product quality investigation task form.
4. Select **Save**.

Related topics

Discuss form

Notes form

Stakeholders

Create the stakeholder form to update the stakeholder involved in the product quality investigation.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Quality Investigation** > **Stakeholder**.
2. Select **New**.
3. On the Stakeholder form, fill in the fields.
   For a description of the field values, see Stakeholder form.
4. Select **Save**.

Corrective action

Create corrective action for the quality investigation case.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Quality Investigation** > **Corrective Action**.
2. Select **New**.
3. On the Corrective Action form, fill in the fields.

For a description of the field values, see Corrective action form for PQI.

4. Select **Save**.

Related topics

CoPQ expense line

Impacted asset action

Preventive action

Create the preventive action for product quality issue case.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Product Quality Investigation** > **Preventive Action**.
2. Select **New**.
3. On the Preventive Action form, fill in the fields.
   For a description of the field values, see Preventive action form.
4. Select **Save**.

Related topics

CoPQ expense line

Impacted asset action

Remediation action plans

The Agents workspace enables you to create and view the remediation action plans.

Create remediation action plan

Create the remediation action plan for product quality investigation case.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Remediation Action Plan**.
2. Select **New**.
3. On the Remediation Action Plan form, fill in the fields.
   For a description of the field values, see Remediation action plan form.
4. Select **Save**.

Related list for remediation action plan

In the workspace, you can use the remediation action-related list to log the information.

Related list	Description
CoPQ financial requests	Create the CoPQ financial requests.

Related list	Description
Correction actions	Create a correction action.
Containment actions	Create a containment action.
Corrective action	Create corrective action.
Preventive action	Create preventive action.
Cause action plans	Create a cause action plan.

CoPQ financial requests

Create CoPQ financial request for remediation action plan.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Remediation Action Plan** > **CoPQ Financial Request**.
2. Select **New**.
3. On the CoPQ Financial Request form, fill in the fields.
   For a description of the field values, see CoPQ financial requests form.
4. Select **Save**.

Related topics

Notes form

Resolution information form

CoPQ planned line charge

Create a CoPQ planned line charge for CoPQ financial request.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Remediation Action Plan** > **CoPQ Financial Request** > **CoPQ Planned Line Charge**.
2. Select **New**.
3. On the CoPQ Planned Line Charge form, fill in the fields.
   For a description of the field values, see CoPQ planned line charge form.
4. Select **Save**.

Related topics

CoPQ expense line

Cause action plans

Create a cause action plan for the remediation action.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **List** > **Remediation Action Plan** > **Cause action plan**.
2. Select **New**.
3. On the Cause Action Plans form, fill in the fields.
4. Select **Save**.

Additional workflows

Additional workflows installed with the Manufacturing Commercial Operations.

Customer Service Management

Agents and managers can use the Customer Service Management application to create cases for customers, route cases to agents with the required skills and availability, manage customer information and case activity, and connect with other applications and departments to assist with case resolution.

To learn how to use the Customer Service Management, see Using Customer Service Management.

Order Management

The Order Management application for Manufacturing Commercial Operations creates a seamless ordering experience for your manufacturing customers.

Use Order Management as the system of action and relay order status via the customer service portal. Orders can be captured and fulfilled in any system and synced back to the Order Management order table.

To learn how to use Order Management, see Order management.

Using the Business Portal in Manufacturing Commercial Operations

Customers can use the Business Portal to browse product catalogs and create product orders in Sales Customer Relationship Management for Manufacturing Commercial Operations.

The Business Portal is a self-service web portal in Manufacturing Commercial Operations based on the Service Portal application.

The Business Portal supports your business-to-business (B2B) customers, enabling them to configure products and place orders independently via a self-service portal. The portal provides ready to use features that require minimal setup. These include:

- Header and footer with links for different customer activities.
- The home page provides a summary of essential items to the logged-in user.
- A hierarchical menu to navigate and access different portal pages.
- Unified browse experience for knowledge and catalog through taxonomy topics.
- List pages to browse, search, and filter through records of cases, products, orders, and others.
- Record view pages to view key information, related actions, related lists, and quick links of a record.

Note:
The Business Portal Store app is automatically installed when you install the Customer Service Portal store app. For details, see Activate the Consumer and Customer Service Portals.

Create an order using the Business Portal in Manufacturing Commercial Operations

The Business Portal uses the product catalog to let customers browse and configure products. Customers can also build orders and submit them for fulfillment.

Before you begin

Role required: customer

Procedure

1. Navigate to the **Business Portal**, and select the **Product Catalog**.
2. Use the catalog to browse and configure products.
   Here, you can view the product catalog and categories, and select any product to customize it further.
3. Select **Add** to add products to the cart.
4. **Optional:** Select **Customize** to open the product configurator to select product options, and add additional products.
5. Review the pricing structure in the Current Selection panel.
6. Select **Add** to add the product to the cart.
7. Return to the product catalog to add any additional products to the order.
8. Select the shopping cart to view the products in your cart.
9. In the shopping cart, select **View cart** to open detailed information about the products in the cart.
10. Select **Submit Order** to create an order or **Return to Catalog** to return to the catalog view.

Result

When the order is submitted, **Order Details** opens and shows the order number and order details.

View an order with the Business Portal

View orders using the Business Portal in Manufacturing Commercial Operations.

Before you begin

Role required: agent

Procedure

1. Navigate to the Business Portal.
2. In the Business Portal, select **Requests** > **View submitted request** > **View orders**.
   The View order window has the following controls.
   - To search for orders, use the search icon.
   - To sort, and filter orders, use the filter icon.
   - To export as a PDF, Excel, or CSV, use the More Actions icon.
   - To open and order, select the order number.

Result
The Order items are displayed.
The agent has the option to approve or reject the order.

Create an invoice case

Agents can create invoice cases from the Invoice Cases list view in CSM Configurable Workspace in Manufacturing Commercial Operations.

Agents can create invoice cases by selecting **New** from the Invoice Cases list view. From the Invoice case record, agents can:

- Add invoices or invoice lines to the invoice case.
- Delete invoices or invoice lines from the invoice case.
- Create invoice case lines.
- Edit the details of invoice case lines.
- Assign invoice case lines to themselves.
- Create tasks for invoice case lines.

Selecting **Save** on the Invoice case record moves the invoice case and the invoice case lines currently in the Draft state to the New state. Once in the New state, agents can begin working to resolve the invoice case. This can include creating tasks for invoice case lines, assigning them to other agents or team members, and monitoring case progress.

Request source

An agent can create the following types of invoice cases:

- Cases that reference one or more invoice lines from a single customer invoice.
- Cases that reference multiple customer invoices.

The Invoice case record includes the **Request source** field. An agent can select the following values in this field:

- **Specific invoice lines, single invoice**: The invoice case is for a single customer invoice. The agent can select the invoice in the **Invoice** field.
- **Invoice header details, multiple invoices**: The invoice case is for multiple customer invoices.

Add invoices and invoice lines to an invoice case

Invoice cases can include a list of invoice case lines. These case lines represent either customer invoices or invoice lines from a single customer invoice.

Once an invoice case has been created, agents can add invoices or invoice lines to the case by selecting **New** from the Invoice Case Lines related-list. Selecting this action displays a new Invoice Case Line record.

The agent can select an invoice line or invoice for the Invoice Case Line record and then select **Save** to add it to the invoice case as an invoice case line.

Service Exchange for Providers

As a manufacturer using Service Exchange for Providers in Manufacturing Commercial Operations, learn how to use Service Exchange to submit requests from the service catalog, and track order fulfillment from your ServiceNow® instances.

Service Exchange for Consumers

As a manufacturer using Service Exchange for Consumers in Manufacturing Commercial Operations, learn how your consumers can use Manufacturing Commercial Operations with Service Exchange to submit requests from the service catalog, all from your ServiceNow® instance.

Reference

Reference topics provide additional information about Manufacturing Commercial Operations.

Components installed

Several types of components are installed with installation of the Manufacturing Commercial Operations application. These components include user roles, tables, plugins, ServiceNow Store applications, and business rules.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

User roles are assigned by the use case that is being supported. For each feature, there are both roles with view-only access and roles with various levels of interactive access.

Manufacturing Commercial Operations Core roles

Role	Contains roles
sn_mfg_cmn.manufacturing_operations_admin	• sn_sls_prm_clm_mgt.bulk_upload_admin • sn_sales_prm_mgmt.sales_promotion_manager • sn_mfg_cmn.input_set_writer • sn_labr_cmn.labr_admin • sn_repr_claim_mgmt.claim_admin • sn_sls_prm_clm_mgt.sales_promotion_claim • sn_rcl_claim_mgmt.adminsn_prd_pm.product_catalog_admin • sn_sales_prm_mgmt.sales_promotion_admin • sn_prm.enterprise_partner_admin • sn_dealer_mgmt.dealer_admin • sn_customerservice_manager • sn_claim_cmn.claims_agent • sn_prm.partner_ui • sn_repair_claim_mgmt.repair_pre_auth_admin

Manufacturing Commercial Operations Core roles (continued)

Role	Contains roles
sn_claim_cmn.claims_agent	• sn_sales_prm_mgmt.sales_promotion_viewer • sn_prm.enterprise_partner_agent • sn_rcl_claim_mgmt.campaign.viewer • sn_customerservice_agent • sn_dealer_mgmt.dealer_viewer • sn_repr_claim_mgmt.navigation_menu • sn_prd_pm.product_catalog_viewer • sn_repr_claim_mgmt.claim_writer • sn_sls_prm_clm_mgt.sales_promotion_claim_writer • sn_mfg_cmn.navigation_menu • sn_repr_claim_mgmt.charge_creator • financial_mgmt_user • sn_repair_claim_mgmt.repair_pre_auth_viewer • sn_repr_claim_mgmt.pre_auth_navigation_menu
sn_dealer_mgmt.dealer_service_advisor	• sn_repr_claim_mgmt.claim_creator • sn_rcl_claim_mgmt.campaign.viewer • sn_customerservice.customer_case_manager • sn_prd_pm.external_product_viewer • sn_dealer_mgmt.dealer_viewer • sn_customerservice.requester • sn_prm.external_partner_associate • sn_repair_claim_mgmt.repair_pre_auth_admin • sn_repr_claim_mgmt.pre_auth_navigation_menu
sn_dealer_mgmt.dealer_sales_agent	• sn_dealer_mgmt.dealer_viewer • sn_prm.external_partner_associate • sn_sls_prm_clm_mgt.bulk_upload_creator • sn_sales_prm_mgmt.sales_promotion_viewer • sn_sls_prm_clm_mgt.sales_promotion_claim_creator • sn_customerservice.case_contributor_creator • sn_customerservice.requester
sn_rcl_claim_mgmt.recall_manager	sn_rcl_claim_mgmt.campaign.creator

Manufacturing Commercial Operations Core roles (continued)

Role	Contains roles
sn_sales_prm_mgmt.sales_promotion_manager	• sn_sales_prm_mgmt.sales_promotion_creator • sn_sls_prm_clm_mgt.sales_promotion_claim_viewer • sn_customerservice.csm_workspace_user • sn_mfg_cmn.navigation_menu
sn_dealer_mgmt.dealer_operations_admin	• sn_prm.external_partner_manager • sn_sls_prm_clm_mgt.bulk_upload_admin • sn_dealer_mgmt.dealer_sales_agent • sn_dealer_mgmt.dealer_service_advisor
sn_rcl_claim_mgmt.recall_phase_owner	sn_rcl_claim_mgmt.campaign_phase.writer
sn_claim_cmn.warranty_specialist	• sn_customerservice_agentsn_dealer_mgmt.dealer_viewer • sn_repr_claim_mgmt.navigation_menu • sn_prd_pm.product_catalog_viewer • sn_mfg_cmn.navigation_menu • financial_mgmt_user • sn_repair_claim_mgmt.repair_pre_auth_writer • sn_repair_claim_mgmt.repair_pre_auth_charge_creator • sn_repair_claim_mgmt.claim_viewer • sn_repr_claim_mgmt.pre_auth_navigation_menu

Related topics

Explore Manufacturing Commercial Operations

Components installed with additional plugins

Several types of components are installed when you activate the Customer Service Management, Cash to lead, and Service Bridge applications.

Components installed

Products	Components installed
Customer Service Management	Components installed with Customer Service Management
Lead-to-Cash Process Management	Components installed with Lead-to-Cash Process Management
Service Exchange for Providers	Components installed with Service Exchange for Providers

Components installed (continued)

Products	Components installed
Service Exchange for Consumers	Components installed with Service Exchange for Consumers

Related topics

Additional features

Data model

Learn about the Manufacturing Commercial Operations application as well as its entitlements and integrations by viewing the data model and integrations architecture diagrams. These diagrams show the relationships between the tables and roles within the application. They provide an overall picture of how the Manufacturing Commercial Operations application operates.

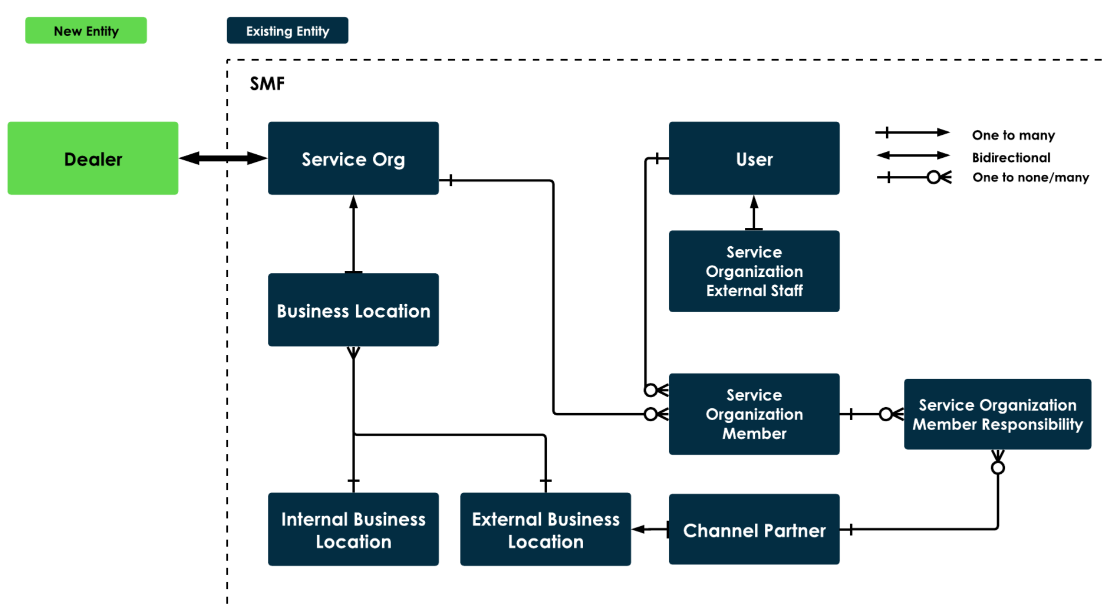
Dealer data model

The dealer framework helps you manage the day-to-day business activities and monitor the real-time data insight.

The dealer portal provides you with a wide range of benefits such as claims management, fostering collaboration between OEM and dealers, service, and support. The Manufacturing Commercial Operations dealer portal enables the dealer sales agent to raise a request for the claim reimbursement for any post sales discounts.

The following diagram shows the entities and their relationships within the Dealer application.

Dealer data model



Dealer tables

This section explains the dealer tables in Manufacturing Commercial Operations.

Dealer plugin

The dealer [sn_dealer_mgmt] feature adds or modifies the existing tables:

- Service Organization [sn_customer_service_organization]
- Business Location [sn_csm_business_location]
- Internal Business Location [sn_csm_business_location_internal]
- External Business Location [sn_cms_business_location_external]
- Service Organization member [sn_cms_service_organization_member]
- Service Organization External Staff [sn_cms_svc_org_member_responsibility]
- Channel Partner [sn_prm_channel_partner]
- Service Organization External Staff [sn_csm_service_organization_external_staff]
- User [sys_user]

The dealer plugin adds the following tables.

Table names for Dealer plugin

Table	Description
Dealer [sn_dealer_mgmt_dealer]	Stores the dealership records.
Service Organization [sn_customer_service_organization]	Stores records for service organizations, including business locations and internal business locations. A service organization provides the base framework that supports the customer value chain. The chain includes the internal and external service organization. For example, automobile manufacturers with multiple dealerships.
Business Location [sn_csm_business_location]	Stores business location records. A business location is a type of service organization.
Internal Business Location [sn_csm_business_location_internal]	Stores the internal business location records that are involved in providing goods and services. For example, stores and branches.
External Business Location [sn_csm_business_location_external]	Stores the external business location records that are involved in providing goods and services. For example, franchises and dealerships.
Channel Partner [sn_prm_channel_partner]	Stores the channel partner information such as name, contact details.

Table names for Dealer plugin (continued)

Table	Description
User [sys_user]	Stores the user records, such as user id and password.
Service Organization member [sn_csm_service_organization_member]	Stores records of the relation between the member and service organization.
Service Organization External Staff [sn_csm_service_organization_external_staff]	Stores records for the users who belong to external service organizations.
Service Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Configure the responsibilities of the staff working at service organizations or its extended entities.

To learn more about the Service Model Foundation, see Configuring Customer Service Management.

Sales promotion campaign data model

A sales promotion is a marketing strategy of implementing new ideas to increase sales, raise brand awareness, and provide discounts to the customers.

Introduction to sales promotion campaign claims

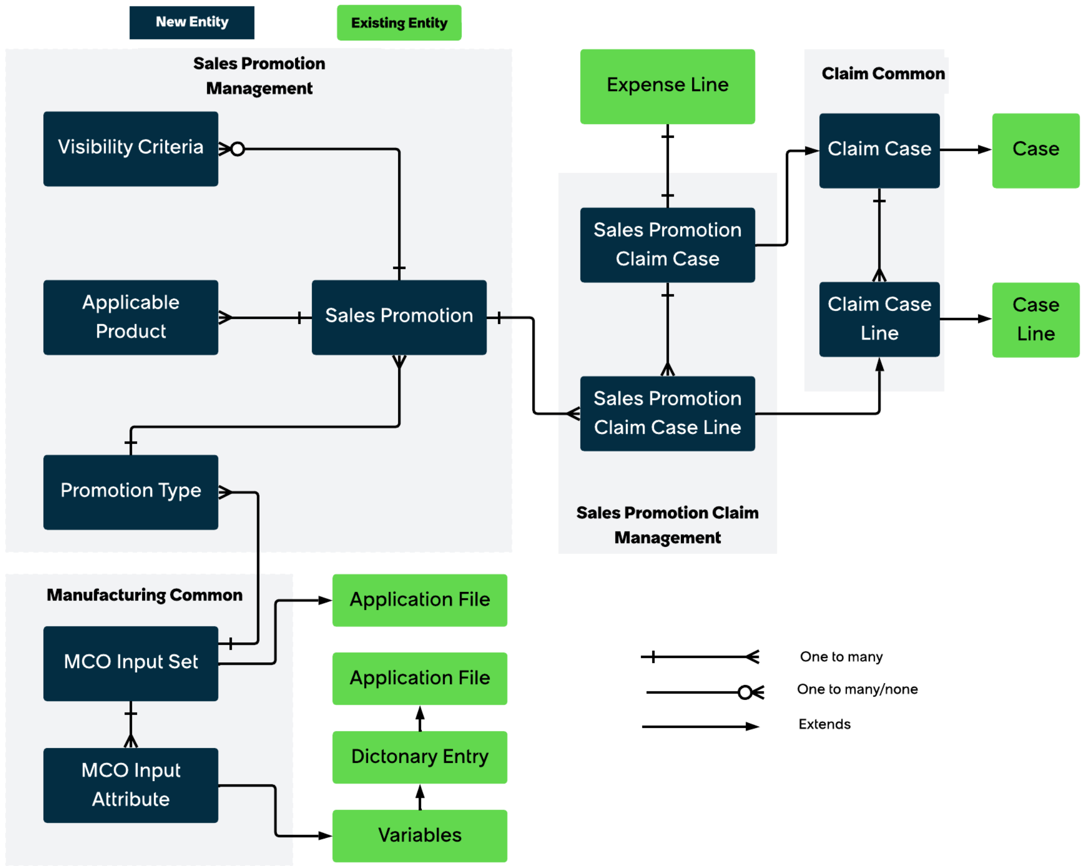
Manufacturers or Original equipment manufacturers (OEMs) announce the sales promotion discounts or offers to the dealers. These promotions are applicable to a set of customers or all the customers based on the OEM marketing strategies. The dealer agents can raise the promotion claims to OEMs for the reimbursement of the discounts or offers provided during the sales process. The sales promotion feature enables the dealer to raise the claims post sales, which can be approved or rejected by the OEM depending on the claim case.

Sales promotion has three main parts:

- Creation of sales promotion by the OEM
- Creation of claim against the promotion by the dealer
- Review and reimbursement of the claim by the OEM

The following diagram shows the entities and their relationships within the Sales promotion campaign claim application.

Sales promotion campaign data model



Bulk Import Sales Promotion claim

The sales promotion supports bulk import functionality, where the dealer sales agents can import a spreadsheet with multiple claims for review and approval. To enable bulk import, you must customize it on the Customer Service Management (CSM) or Business Location Service Portal (BLSP) portals.

To learn more about the Business Location Service Portal, see Using the Business Location Service Portal.

Sales Promotion Campaign Claim tables

This section explains the sales promotion campaign claims tables in Manufacturing Commercial Operations.

Sales Promotion plugin

The sales promotion feature adds or modifies the existing tables:

- Expense Line [fm_expense_line]
- Case [sn_customerservice_case]
- Case Line [sn_case_line]

The sales promotion plugin adds the following tables.

Table names for Sales Promotion plugin

Label	Description
Sales Promotion [sn_sales_prm_mgmt_sales_promotion]	Stores the sales promotion details, which includes promotion name, start and end date of the promotion, incentive type, and incentive percentage. The checklist template provides the details of the documents required during the approval process.
Promotion Type [sn_sales_prm_mgmt_promotion_type]	Stores the promotion type details. Possible types are the following: • trading promotion • senior citizen promotion • veteran promotion .
MCO Input Set [sn_mfg_cmn_mco_input_set]	Stores the grouping information for input attributes.
MCO Input Attribute [sn_mfg_cmn_mco_input_attributes]	Stores the attributes or input variables for an input group.
Applicable Product [sn_sales_prm_mgmt_applicable_product]	Stores the product details which are applicable for the target sales promotion campaign. It can be based on the specific model (manufacturer) or asset (lot or serial number) level.
Claim Case [sn_claim_cmn_case]	Stores the input provided by the dealer to the manufacturer when the claim request is raised. This information is retrieved from the Promotion input table.
Visibility Criteria [sn_sales_prm_mgmt_visibility_criteria]	Stores and displays the dealer name for which the target sales promotion is applicable.
Sales Promotion Claim Case [sn_sls_prm_clm_mgt_case]	Stores the claim case and claim case line progress state information. For example, if the claim case is in the draft, submitted, review, or approved states.
Sales Promotion Claim Case Line [sn_sls_prm_clm_mgt_case_line]	Stores the information about the claim, such as the claim date, amount claimed, status of the claim, and asset.
Expense Line [fm_expense_line]	Automatically populates the short description of expense lines with the work order short description when expense lines are manually created from work orders.
Claim Case Line	Stores the details of the items pertaining to a claim header.

Table names for Sales Promotion plugin (continued)

Label	Description
[sn_claim_cmn_case_line]	
Case [sn_customerservice_case]	Stores the case records created and submitted by the dealer.
Case Line [sn_case_line]	Stores the case line item records.

To learn more about the Case and Case Line, see Case Lines and Workflows.

Repair claims data model

The repair claims framework enables the dealer to raise a reimbursement claim request for the repair of the equipment or product that is under warranty contract.

When a customer approaches the dealer with an equipment or product issue, the dealer diagnoses the issue and fixes it. The dealer can submit the claim to the manufacturers for reimbursement based on the following scenarios.

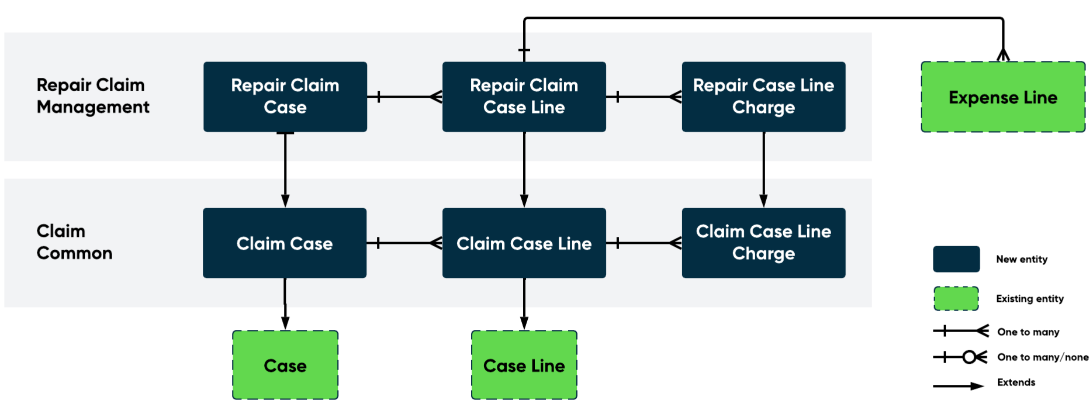
- Repair claim, covered under the warranty
- Recall of the defective products or parts

Note:
Good will and Service contracts can be customized based on the customer requirement.

The repair portal facilitates the dealer to submit the repair claims to the manufacturers or OEM agents. The OEM agents can approve, reject, partially approve, or send back the claim case.

The following diagram shows the entities and their relationships within the repair claims application.

Repair claim data model



Repair claims tables

This section explains the repair claim tables in Manufacturing Commercial Operations.

Repair claim plugin

The repair claim feature adds or modifies the existing tables:

- Expense Line [fm_expense_line]
- Case [sn_customerservice_case]
- Case Line [sn_case_line]

The repair claim plugin adds the following tables.

Table names for repair claim plugin

Label	Description
Repair Claim Case [sn_repair_claim_mgmt_case]	Stores the details of the repair claim request submitted for reimbursement.
Repair Claim Case Line [sn_repair_claim_mgmt_case_line]	Stores the repair claim job level details of the customers.
Repair Case Line Charge [sn_repair_claim_mgmt_case_line_charge]	Stores the specific line item that holds the detailed expenses involved for the repair.
Expense Line [fm_expense_line]	Stores the expense information for the approved or partially approved claim jobs.
Claim Case [sn_claim_cmn_case]	Stores the input provided by the dealer to the manufacturer when the claim request is raised. This information is retrieved from the Promotion input table.
Claim Case Line [sn_claim_cmn_case_line]	Stores the job level details for the claim
Case Line [sn_case_line]	Stores the case line item records that are created for parent cases.
Claim Case Line Charge [sn_claim_cmn_case_line_charge]	Stores the charges incurred for each repair job.

To learn more about the Case and Case Line, see Case Lines and Workflows.

Recall campaign data model

The recall campaign framework enables you to initiate the reimbursement claim request from the OEM for the recalled products.

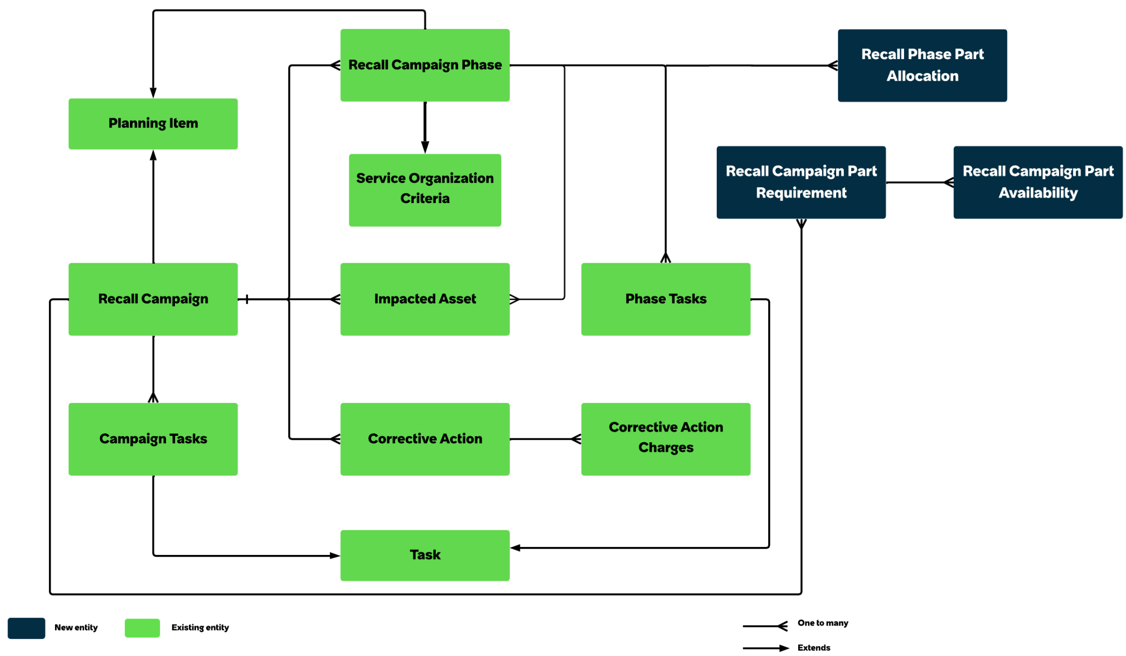
A recall is a measure taken by the manufactures when they identify a safety issue or defect with the product. The recall process launched by the manufacturers or OEM involves the following tasks:

- Identify an issue
- Develop a fix
- Recall planning and preparation (Phase Rollout)
- Recall execution
- Recall claim (Reimbursement for the dealers)

Note:
Only Recall Planning and Preparation and Recall Claim are supported.

A recall is initiated when a particular defect impacts a significant number of products. The following diagram shows the entities and their relationships within the recall claims application.

Recall claim data model



Recall campaign tables

This section explains the recall campaign tables in Manufacturing Commercial Operations.

Recall claim plugin

The recall claim feature adds or modifies the existing tables:

- Planning Item [sn_align_core_planning_item]
- Task [sn_customerservice_task]
- Service Organization Criteria

The recall claim plugin adds the following tables.

Table names for recall claim plugin

Label	Description
Recall Campaign	It's the parent table and stores the Recall campaign initiative information.

Table names for recall claim plugin (continued)

Label	Description
[sn_rcl_claim_mgmt_rcp]	
Recall Campaign Task [sn_rcl_claim_mgmt_campaign_task]	Stores the task information that must be fulfilled to complete the Recall Campaign process.
Recall Campaign Phase [sn_rcl_claim_mgmt_rcp_phase]	Stores the information related to the launch of the recall campaign.
Impacted Finished Goods [sn_rcl_claim_mgmt_finished_good]	Stores the asset information for all the assets impacted by a recall campaign.
Corrective Action [sn_rcl_claim_mgmt_ca]	Stores the remedy procedures to resolve the issues mentioned as part of recall campaign record.
Recall Campaign Phase Task [sn_rcl_claim_mgmt_phase_task]	Stores the tasks related to a recall Campaign phase.
Corrective Action Labor Charges [sn_rcl_claim_mgmt_ca_labor_charges]	Stores the detail of different types of charges to perform the remedy procedures.
Planning Item [sn_align_core_planning_item]	Stores the new item details.

Quality issue management data model

The quality issue management (QIM) framework enables OEMs for documenting non-conformance, evaluating their effects on assets and customers, conducting root cause analysis, and implementing corrective, containment, and other remediation actions.

The QIM brings together quality data, workflows, and stakeholders into a single system of record. This approach boosts transparency, speeds up resolutions, increases accountability, and supports continuous improvement efforts.

The QIM involves the following tasks:

- Issue detection and logging
- Root cause analysis
- Corrective and Preventive Actions (CAPA)
- Outcome monitoring
- Documentation

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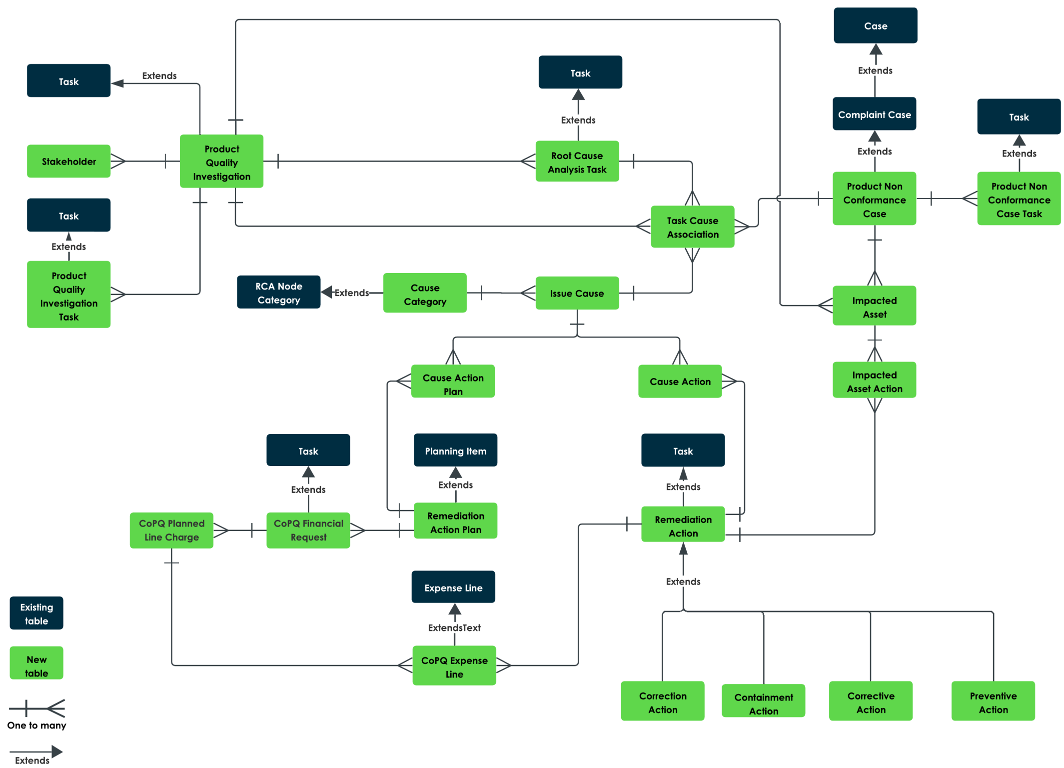
Quality issue management data model



Quality issue management tables

This section explains quality issue management (QIM) tables in Manufacturing Commercial Operations.

QIM plugin

The QIM feature adds or modifies the existing tables:

- Task [sn_customerservice_task]
- RCA node category [sn_rca_node_category]
- Planning item [sn_align_core_planning_item]
- Expense line [fm_expense_line]
- Case
- Complaint case [sn_complaint_case]

The QIM plugin adds the following tables.

Table names for QIM plugin

Label	Description
Stakeholder [sn_mfg_qm_stakeholder]	Defines stakeholders for an issue with assigned RACI role and responsibility mapping.

Table names for QIM plugin (continued)

Label	Description
Product Quality Investigation Task [sn_mfg_qm_prd_qi_task]	Creates tasks for performing activities related to studying and gather further information on Quality Issue.
Product Quality Investigation [sn_mfg_qm_prd_qi]	Store the manufacturing quality issues that require deeper analysis.
Root Cause Analysis Task [sn_rm_core_rca_task]	Captures and manages the individual tasks created as part of a Root Cause Analysis (RCA) process.
Task Cause Association [sn_rm_core_task_cause_assoc]	Associates tasks and RCA records with identified causes, including type classification.
Cause Category [sn_rm_core_cause_category]	Defines hierarchical categories for classifying issue causes.
Issue Cause [sn_rm_core_issue_cause]	Captures cause identified for an issue, with category and external reference.
Cause Action Plan [sn_rm_core_cause_action_plan]	Links a cause to its defined action plan.
Cause Action [sn_rm_core_cause_action]	Associates a cause with the actions addressing it.
Remediation Action [sn_rm_core_rem_action]	Store the investigation related information.
Correction Action [sn_rm_core_correction_action]	Captures immediate actions taken to correct an identified issue.
Containment Action [sn_rm_core_containment_action]	Tracks short-term measures to contain or limit the impact of an issue.
Corrective Action [sn_rm_core_corrective_action]	Defines long-term actions implemented to eliminate the root cause of an issue.
Preventive Action [sn_rm_core_preventive_action]	Specifies proactive measures to avoid recurrence or future issues.
CoPQ Planned Line Charge [sn_rm_core_copq_planned_line_charge]	Defines planned cost line items for CoPQ financial requests, with unit cost, quantity, and type.

Table names for QIM plugin (continued)

Label	Description
CoPQ Financial Request [sn_rm_core_copq_fin_req]	Manages financial requests for CoPQ, including approvals.
CoPQ Expense Line [sn_rm_core_copq_exp_line]	Captures actual cost entries linked to an action.
Product Non-conformance Case [sn_mfg_qm_prd_ncc]	Stores details of functional deviation/non-conformance of a product.
Product Non-conformance Case Task [sn_mfg_qm_prd_ncc_task]	Creates task for performing activities related to studying and analyzing NC Case.
Impacted Asset [sn_mfg_qm_impacted_asset]	Tracks assets impacted by a reported issue, including their status and linkage to install base records.
Impacted Asset Action [sn_mfg_qm_impacted_asset_action]	Links actions to impacted assets for issue resolution tracking.

Repair form

Includes all the forms related to repair and recall.

Campaign tasks form

Campaign tasks form enables you to add the recall campaign details.

Campaign task form fields

Field	Description
Number	Campaign task number that is automatically generated.
Assigned to	Name of the person to assign the campaign task.
Recall campaign	Recall campaign details that are fetched from Recall campaign form.
Priority	Priority information that is fetched from Recall campaign form.
State	State of the campaign task. Options are: • Pending • Open • Work in Progress • Closed Complete

Campaign task form fields (continued)

Field	Description
	• Closed Incomplete • Closed Skipped
Active	Active or inactive state of the campaign task.
Short description	Short description of the campaign task.
Description	Any information that you want to update for next phases.

Corrective action form

The corrective action form enables the OEM to address the asset issue, either by eliminating or replacing the asset.

Corrective action form fields

Field	Description
Number	Corrective action number that is automatically generated. The number starts with CA.
Name	Name of the corrective action.
Affected part	Choose the affected part. This is the part for which the corrective action is being performed.
State	State of the action.
Recall campaign	Recall campaign details that are fetched from Recall campaign form.
Mandatory	Option to set the corrective action as required. If selected, then the technician has to perform corrective action.
Remedy type	Remedy type specifies the corrective action as to what type of correction is being performed. • If remedy type is repair: only one corrective action charge is required. • If the remedy type is replacement: add the affected part. In the Corrective action charges form, select the **Type** as "Part" and the **Main part**.
Impacted asset applicability	Applying conditions for the impacted assets table on the part of recall campaign.
Details	Brief detail about the corrective actions.

Corrective action charges form

Corrective action charges form include the expenses related to addressing a non-conformance like labor charges.

Corrective action charges form fields

Field	Description
Corrective action	Corrective action number that is automatically generated. The number starts with CA.
Type	Corrective action charges type. Options are: • Labor: **Labor code** is displayed • Part: **Part** and **Main part** is displayed • Miscellaneous • External services
Labor code	Name of the labor code.
Part	Select the part name to be replaced.
Main part	Select the main part to designate the part as main part.
Quantity	Quantity of the item to be replaced or repaired.
Unit of measure	Unit of measure is configurable. Available options are: • Box • Bundle • Carton • Case • Days • Each • Kit • Month • Pack • Year
Unit price	The unit price on the corrective action charges doesn't include taxes and other costs. **Note:** The unit price is used to determine the base cost for the part (unit cost * quantity). Taxes and other charges are mentioned on the claim.
Impacted asset applicability	List of assets that are impacted.

Corrective action charges form fields (continued)

Field	Description
Description	Brief detail about the corrective actions charges.

Related topics

Corrective action charges

Claim details form

The Claim details form enables the dealer to enter the claim details for the repair work performed.

Claim details form fields

Field	Description
Asset	Asset or product on which repair action is performed.
Requested by	User who is raising the repair claim request.
Consumer	Customer information that is auto-populated based on the install base.
Description	Short description on the repair claim.
Dealer	Dealer who is raising the repair claim request.
Reported date	Date on which the claim is being raised.
Work order	Claim work order number that is a string value.

Related topics

Roles and components of Partner Relationship Management

Submit a repair claim for warranty

Submit a repair claim for recall

Phase task form

Phase task form enables you to add the details of the recall phase.

Phase task form fields

Field	Description
Number	Recall campaign phase task number. This field is automatically generated. The number starts with TASK.
Assign to	Name of the person to assign the recall campaign phase task.
Recall campaign phase	Recall campaign phase.
Priority	Priority of the recall phase task. Options are:

Phase task form fields (continued)

Field	Description
	• 1-Critical • 2-High • 3-Moderate • 4-Low • 5-Planning
State	State of the campaign task. Options are: • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped By default, Open is displayed.
Active	Active or inactive state of the phase task.
Short description	Short description of the phase task.
Description	Detailed description of the phase task.

Related topics

Adding a phase task

Recall campaign form

The recall campaign form provides the original equipment manufacturer (OEM) with the required information to initiate a recall campaign.

Recall campaign form fields

Field	Description
Number	Recall campaign unique number. This field is automatically generated. The number starts with RCP.
Campaign name	Name of the campaign.
Planned start date	Start date from which the recall campaign is applicable.
Product issue number	Serial number of the product for which the recall campaign is created.
State	The recall campaign state. The default is draft.
Recall type	Recall issue type. Options are:

Recall campaign form fields (continued)

Field	Description
	• Product defect • Regulatory • Safety • Technical service bulletin • Stop drive recall • Park outside advisory • Miscellaneous
Priority	Priority of the recall. Options are: • 1-Critical • 2-High • 3-Moderate • 4-Low • 5-Planning
Assignment group	Group of the recall manager who is responsible for handling the current campaign.
Assigned to	Recall manager from the assignment group who is responsible for handling the current campaign.
Short description	Short description of the product issue.
Recall issue details	Detailed issues for which the product is recalled.
Work notes	Additional notes, if any.

Related topics

Create a campaign

View All campaigns

Recall campaign phase form

The recall campaign phase form enables you to add the recall campaign phases details.

Recall campaign phase form fields

Field	Description
Number	Recall campaign phase number is the recall campaign record number for which sub-phase is being created. The number starts with RCPPH.

Recall campaign phase form fields (continued)

Field	Description
Name	Recall campaign phase name.
Planned start date	Planned start date of the recall campaign. **Note:** For sub-phase, start date cannot be before the parent phase start date.
Planned end date	End date of the recall campaign. **Note:** For sub-phase, end date cannot be later then the parent phase end date.
Parent phase	Parent phase to which sub-phases (child phases) can be associated. To make the current recall phase as parent phase, leave it empty. If you are creating a sub-phases for a specific phase, then that parent phase name will be displayed.
State	State of the recall campaign phase. This field is automatically set to draft.
Assignment group	Assignment group of the phase owner who is responsible for this Phase.
Assigned to	Name of the person to assign the recall campaign phase.
Dealer visibility	Service organization criteria to whom this recall campaign phase are visible. For sub-phase, dealer visibility criteria will be copied from the parent phase, and it can be modified. **Note:** For Dealer visibility setup information, see Create the criteria for a service organization.
Description	Brief description about the recall campaign phase.

Related topics

Create a campaign phase

Create My campaign phases

Repair claim form

The repair claim form enables you to enter the warranty and recall claim details.

Repair claim form fields

Field	Description
Warranty	
Note: Fields under the Warranty section are displayed when you select the Warranty claim option type under Add claim jobs.	
Pre-auth case line	Displays all the repair pre-authorization case lines previously created for the selected repair associated with this claim case. **Note:** If the pre-authorization is selected from the drop-down list, it automatically fetches the casual parts and miscellaneous details.
Casual part	Part number of the product that is repaired.
Repair action	Repair action type. Options are: • Repair • Replacement • Software update
Issue description	Name of the product that has the issue.
Repair details	Short description of the repair details.
Recall	
Note: Fields under the Recall section are displayed when you select the Recall claim option.	
Recall campaign	Recall campaign.
Corrective action	Corrective action that is taken to resolve the issue.
Casual part	Part number. This field is auto-populated from the chosen corrective action.
Remedy type	Remedy procedures to resolve the issues mentioned as part of Recall Campaign Record. This field is auto-populated.
Repair details	Short description of the repair details. This field is auto-populated from the details available on the corrective action but can be modified by the service agent.

Repair claim form fields (continued)

Field	Description
Parts	
Part number	Part number that is repaired, replaced, or upgraded.
Casual part replacement	Casual part replacement is enabled only if you select repair action as replacement or if remedy type contains replacement for recall claim job.
Quantity	Quantity of assets that are repaired. Unit of measure includes: • Case • Pack • Carton • Kit • Each • Bundle • Box
Base amount	Base amount of the part. It is without tax.
Tax rate	Tax rate.
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: `base amount * quantity + tax rate`.
Labor	
Labor code	Labor code.
Duration	Time required to repair or replace the part or product. Unit of measure includes: • Year • Hours • Month • Days
Base amount	Base amount of the labor work performed. It is without tax.
Tax rate	Tax rate.
Claimed amount	Claimed amount.This amount is calculated based on the base amount, quantity, and tax rate.

Repair claim form fields (continued)

Field	Description
	For example: `base amount * quantity + tax rate`.
External services	
Description	Details of the external services taken for the repair or replacement of the part.
Base amount	Base amount of the external service taken. It is without tax.
Tax rate	The tax rate.
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: `base amount * quantity + tax rate`.
Miscellaneous	
Miscellaneous	Details of the miscellaneous services.
Base amount	Base amount for any miscellaneous services.
Tax rate	Tax rate.
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: `base amount * quantity + tax rate`.
Claimed job amount	Total amount claimed for this job. It includes: • Parts claimed amount • Labor claimed amount • External services claimed amount • Miscellaneous claimed amount
Attachments	Attachments that support your claims.

Related topics

Submit a repair claim for warranty

Submit a repair claim for recall

Pre-authorization form

The pre-authorization form enables you to enter the pre-authorization details.

Submit claim case

Field	Description
Asset	Select the asset.
Requested by	Select the person who raised the request.
Consumer	Select the name of the consumer.
Product usage	Enter the number of **Asset** used. It provides insights into how customers use a product.
Description	Brief description about the pre-authorization request.
Dealer	Select the dealer.
Reported date	Select the date on which pre-authorization claim required is submitted.
External repair order number	Entered by the dealer service advisor when initiating a claim for a completed repair.
Unit of measure	Quantity of assets that are raised for pre-authorization claim. Unit of measure is configurable. Available options are: • Box • Bundle • Carton • Case • Days • Each • Kit • Month • Pack • Year

Related topics

Create a pre-authorization request

Pre-authorization job details form

The pre-authorization job form enables you to enter the warranty, labor, and part details.

Pre-authorization job details form

Field	Description
Warranty	

Pre-authorization job details form (continued)

Field	Description
Note: Fields under the Warranty section are displayed when you select the Warranty claim option type under Add claim jobs.	
Casual part	Part number of the product that is repaired.
Repair action	Repair action type. Options are: • Repair • Replacement • Software update
Issue description	Name of the product that has the issue.
Proposed repair details	Short description of the repair details.
Parts	
Part number	Part number that is repaired, replaced, or upgraded. It's fetched from the product model.
Casual part replacement	Casual part replacement is enabled only if you select repair action as replacement or if remedy type contains replacement for recall claim job.
Quantity	Quantity of assets that are repaired. Unit of measure is configurable. Available options are: • Case • Pack • Carton • Kit • Each • Bundle • Box
Base amount	Base amount of the part. It is without tax.
Tax rate	Tax rate.
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: `base amount * quantity + tax rate`.
Labor	

Pre-authorization job details form (continued)

Field	Description
Labor code	Labor code. It's the main data for implementation.
Duration	Time required to repair or replace the part or product. Unit of measure includes: • Year • Hours • Month • Days
Base amount	Base amount of the labor work performed. It is without tax.
Tax rate	Tax rate.
Claimed amount	Claimed amount.This amount is calculated based on the base amount, quantity, and tax rate. For example: `base amount * quantity + tax rate`.
External services	
Description	Details of the external services taken for the repair or replacement of the part.
Base amount	Base amount of the external service taken. It is without tax.
Tax rate	The tax rate.
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: `base amount * quantity + tax rate`.
Miscellaneous	
Description	Details of the miscellaneous services.
Base amount	Base amount for any miscellaneous services.
Tax rate	Tax rate.
Claimed amount	Claimed amount. This amount is calculated based on the base amount, quantity, and tax rate. For example: `base amount * quantity + tax rate`.
Claimed amount	Total amount claimed for this job. It includes:

Pre-authorization job details form (continued)

Field	Description
	• Parts claimed amount • Labor claimed amount • External services claimed amount • Miscellaneous claimed amount
Attachments	Attachments that support your claims.
Pre-approval requested amount	Total amount claimed includes parts, labor, external services, and miscellaneous items.

Related topics

Create a pre-authorization request

Sales promotion form

Includes all the forms related to the sales promotion.

All promotion form

The All promotion form enables the manufacturers to enter the promotion campaign and incentive details.

All promotion form fields

Field	Description
Number	Unique number that is displayed for each new record.
Name	Name of the sales promotion.
Start date	Effective start date of the campaign. It can't be less than the current date.
End date	Effective end date of the campaign.It can't be less than the start date.
Owner	Owner responsible for this sales promotion from the list.
State	Current state of the promotion. This field is automatically set to In draft.
Promotion type	Promotion type. Choose an option from the list. To create promotion type, see Create promotion type.
Checklist template	Predefined checklist template. Choose an option from the list. To create checklist template, Create a checklist template

All promotion form fields (continued)

Field	Description
Description	Short description for the sales promotion.
Applicable Discount	
Incentive type	Incentive type. Options are: • amount • percentage
Min incentive	Lowest possible incentive for the campaign. This field appears only when **amount** is selected from **Incentive type**.
Max incentive	Highest possible incentive for the campaign. This field appears only when **amount** is selected from **Incentive type**.
Min percentage	Lowest discount percentage applicable for the campaign. This field appears only when **percentage** is selected from **Incentive type**.
Max percentage	Highest discount percentage applicable for the campaign. This field appears only when **percentage** is selected from **Incentive type**.

Related topics

View all promotions

My promotions form

The My promotions form enables the manufacturers to enter the promotion campaign and incentive details.

My promotions form fields

Field	Description
Number	Unique number that is displayed for each new record.
Name	Name of the sales promotion.
Start date	Effective start date of the campaign. It can't be less than the current date.
End date	Effective end date of the campaign. It can't be less than the start date.
Owner	Owner who is responsible for this sales promotion.
State	Current state of the promotion. This field is automatically set to In draft.
Promotion type	Promotion type.

My promotions form fields (continued)

Field	Description
	Choose an option from the list. To create promotion type, see Create promotion type.
Checklist template	Predefined checklist template. Choose an option from the list. To create checklist template, see Create a checklist template.
Description	Short description for the sales promotion.
Applicable Discount	
Incentive type	Incentive type. Options are: • amount • percentage
Min incentive	Lowest possible incentive for the campaign. This field appears only when **amount** is selected from **Incentive type**.
Max incentive	Highest possible incentive for the campaign. This field appears only when **amount** is selected from **Incentive type**.
Min percentage	Lowest discount percentage applicable for the campaign. This field appears only when **percentage** is selected from **Incentive type**.
Max percentage	Highest discount percentage applicable for the campaign. This field appears only when **percentage** is selected from **Incentive type**.

Related topics

Create a promotion

Sales promotion bulk upload form

Bulk sales promotion upload form.

Bulk upload form fields

Field	Description
Sales promotion number	Sales promotion campaign number.
External id	ID of sales promotion in third-party system.
Sold product cost	Price of the product sold.
Promotion percentage applied	Percentage discount applied for the promotion.
Currency	Currency type.

Bulk upload form fields (continued)

Field	Description
Promotion value	Discount given for a promotion.
Sold product serial number	Serial number of the sold product.

Channel partner form

Use the fields on the channel partner form to manage and store information related to channel partners.

Channel partner form fields

Field	Description
Number	Automatically generated number of the channel partner. **Note:** By default, channel partner numbers start with the prefix CHPRTNR.
Name	Name of the channel partner.
Enterprise partner manager	Manager from the enterprise who is associated with the channel partner.
External partner manager	Manager from the channel partner that supervises partner member activities.
Status	Status of the channel partner. Options are: • Suspended • Terminated.
Parent channel partner	Parent entity of the channel partner.
Company	Company that is associated with the channel partner.
Created	Date when the channel partner is created.
Active	Option to activate the channel partner. By default, this field is active.
Description	Short description.
Revenue according to year	Channel partner annual revenue.
Number of employees	Number of employees working for the channel partner.
Industry	Industry to which the channel partner belongs.
Website	Channel partner website details.
Email	Channel partner email address.
Phone	Channel partner phone number.

Channel partner form fields (continued)

Field	Description
Company Address	Channel partner company address.
Activity	Updates and information related to the channel partner.

Related topics

Create a channel partner

Internal business location form

Internal Business Location (IBL) form to store information about an internal business location. This information includes the staff members assigned to that location, cases, sold products, and install base items created for customers.

Internal business location form

Field	Definition
Number	Automatically generated number of the internal business location. By default, the location numbers start with the prefix IBL.
Name	Name of the internal business location.
Type	Type of organization. Select any one of the following: • Business location: Physical location of a business where a business operates • Business group: An organization that may also consist of a collection of parent and child companies operating as a single entity.
Business function	Type of functions offered at a business location. Select the following business function: • Service: Select this type if a business location provides service-related functions, such as providing support, or resolving cases for accounts, consumers, or other business locations. • Sales: Select this type if a business location provides sales-related activities, such as creating or managing orders, generating quotes, handling opportunities or leads, managing pricing, offering product recommendations, or supporting account-based selling for accounts, consumers, or other business locations. • Service and Sales: Select both service and sales if the business location is providing both service-related and sales-related activities. **Note:** You can create and manage orders and cases by selecting both types of business functions.
Manager	Manager of the internal business location. **Note:** Only internal users can be added as managers for the internal business locations.

Internal business location form (continued)

Field	Definition
Parent Internal Business Location	Parent of the business location. Use this field to create a parent-child hierarchy.
Street	Street address of the internal business location.
City	City where the internal business location is located.
State/ Province	State or province where the internal business location is located.
ZIP/Postal code	ZIP code or postal code for the internal business location.
Customers served	Type of customers who are served at a business location. The customers served can be defined with two options: • **All Customers**: Enables service organization staff to create and resolve issues for all the customers. • **Criteria-based**: Enables service organization staff to create and resolve issues only for customers associated with the service organization using certain criteria.
Website	Web address for the internal business location.
Email	Email ID used by the internal business location.
Phone	Phone number for the internal business location.
Open date	Date on which the business location becomes operational and available for customers.
Close date	Date on which the business location becomes non-operational and unavailable for customers. **Note:** The closed date must not be earlier than the open date.
Status	Current status of the business location whether In progress, Operational, non-operational, or closed.
Description	Description of the business location.

Install based item form

An install base item refers to an application service configuration item. Each install base item references the configuration item record for the customer. If issues arise with a configuration item, customer service agents can trace which install base items that the case is affecting.

Install Base Item form fields

Field	Description
Number	Unique ID of the install base item. This field is automatically filled in, but you can change it.
Name	Name of the install base item.
Configuration Item	Configuration item that is associated with the install base item. The sn_customerservice_manager role must also have the app_service_user role to create the install base items for the Application Service configuration item class. For more information, see Application services. Service models have a model category called the Application Service, which links a service model to the Application Service CI class. For more information, see Models and Model categories.
Consumer	Consumer that is associated with the install base item. **Note:** The Account field is hidden if the **Consumer** field is entered first.
Owned by	Business manager of the install base item. If the business manager is entered in the configuration item, this field is automatically filled in with the information from the configuration item.
Supported by	If the CI contains this information, this field is automatically filled in with the information from the configuration item.
Product	Product model that is associated with an install base and is used to identify the services that are associated with any product model. **Note:** A product model must have a single specification. The specification that is associated with the product model appears only on the install base form.
Location	Location that is associated with the product.
Status	Option that determines whether the product is original or a replacement.
Life cycle stage	CSDM life cycle stage of an install base item.
Life cycle stage status	CSDM life cycle stage status of an install base item.
Active	Option that represents whether the install base is active or inactive. If the state is active, related cases for a product can be created. **Note:** A synchronization between the active state, install date, and uninstall date is present. On the install base form, if the **State** is **In Use**, it means that the **Active** option is selected. If the **Active** option remains unselected then the **State** is set to **Inactive**.
Install date	Date on which the install base becomes active.

Install Base Item form fields (continued)

Field	Description
Uninstall date	Date on which the install base becomes inactive.
Asset	Asset that is associated with an install base.
Specification	Specification that is associated with an install base item. Option that helps in fulfilling orders to create an install base item and its hierarchy. **Note:** The **Specification** field appears only to CSM agents, managers, and contributor persona.

Related topics

Create an install base item

MCO input attributes form

MCO input attributes form.

MCO input attributes form fields

Field	Definition
Label	Label that is used for the input fields for a promotion questionnaire.
Column name	Field name of the column.
Type	Type of attribute. To learn more about the types, see ServiceNow AI Platform® field administration.
Model	Model of the product.
Max length	Logical limit for the size of string fields. The length determines how the system displays the string fields in the user interface and how to map them to physical database data types.
Default value	Default value of the field for any new record.
Order	Number of orders. This field defines the order in which the input fields appear in the UI.
Reference	Reference field that stores a reference to a field on another table.
Choice	Option to enable users to see a list of values.
Application	Name of the application.
Active	Option to set the attribute as active.
Read only	Option to specify whether you can change the field value in the user interface.

MCO input attributes form fields (continued)

Field	Definition
Mandatory	Option to specify whether this field must contain a value to save a record.
Display	Option to indicate that this field is the display value for reference fields
Text index	Option to determine whether searches index the text in a table.
Audit	Option to enable auditing for a table.

Quality issue management form

Includes all the forms related to quality issue management.

Product non-conformance case form

Product non-conformance form enables you to add the case details.

Product non-conformance case form fields

Field	Description
Number	Product non-conformance case task number is automatically generated. The number starts with PNCC and incremented for every new report.
Issue severity	Choose the severity of the non-conformance case from the options: • Critical • Major • Moderate • Minor
Priority	Choose the priority of the non-conformance case.
Install Base	Select the install base item that has the issue.
Asset	Select the impacted asset.
State	Choose the state of the non-conformance case. • Draft • New • In progress • Closed complete

Product non-conformance case form fields (continued)

Field	Description
	• Closed canceled • Closed incomplete
Complaint type	Choose the complaint type. • Product • Location • Service • Delivery • Warranty • Installation
Issue type	Choose the category of the non-conformance case, which helps classify the nature of the issue for accurate tracking and resolution. • Design • Process • Supplier • Material • Logistics • Documentation
Total estimated cost	Enter the total estimated cost of the non-conformance case.
Total actual cost	Enter the total actual cost of the non-conformance case.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues.
Assigned to	User to whom the non-conformance case has been assigned.
Required product quality investigation	If you select this option, **Product quality investigation** is displayed.
Product quality investigation	Select the product quality investigation.
Short description	Enter a short description on the non-conformance case.
Complaint details	Enter the complaint details, if any.
Issue definition	
What	Description of the problem or incident in clear, concise terms.
Where	Location of the issue.

Product non-conformance case form fields (continued)

Field	Description
Who	Individuals or teams involved in the issue or affected by it.
When	Timeline of the issue: When it was first detected, when it occurred, and the duration of its impact.
Why	Underlying causes of the issue.
How	Details of how the issue occurred and how it was resolved.
How much	Details of how many cases are there and what is the scale of impact.

Related topics

Create a Product non-conformance

Product non-conformance case task form

Product non-conformance case task form enables you to add the case task details.

Product non-conformance case task form fields

Field	Description
Number	Product non-conformance case task number is automatically generated. The number starts with PNCCT and incremented for every new report.
Parent	Select the parent. It is used to build the hierarchical categories (parent>child).
Account	Select the account.
Consumer	Select the consumer name.
State	Choose the state of the non-conformance case task. • Pending • Open • Work in progress • Closed complete • Closed skipped • Closed incomplete
Priority	Choose the severity of the non-conformance case task from the options: • Critical • Major

Product non-conformance case task form fields (continued)

Field	Description
	• Moderate • Minor
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the non-conformance case task has been assigned.
Visible to customer	Select this option to make the information visible to the customer.
Subject	Enter the primary area of focus.
Description	Enter a short description.

Root cause analysis task form

Root cause analysis task form enables you to enter the root cause of the product non-conformance.

Root cause analysis task form

Fields	Description
Number	Root cause analysis task number is automatically generated. The number starts with RCA and incremented for every new report.
Table	Select the table name for which RCA must be performed.
Target id	Select the record for which RCA must be performed.
Parent	Select the parent. It is used to build the hierarchical categories (parent>child).
Short description	Enter a short note.
Description	Enter a detailed explanation of the issue.
State	Choose the state of the RCA expense line: • New • On hold • In progress • Closed complete • Closed cancelled • Closed incomplete

Root cause analysis task form (continued)

Fields	Description
Priority	Choose the severity of the RCA task from the options: • Critical • Major • Moderate • Minor
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the RCA has been assigned.

Correction actions form

Correction action form enables you to enter the correction action details for the issue.

Correction actions form

Field	Description
Number	Correction actions number is automatically generated. The number starts with CORR and incremented for every new report.
Remediation action plan	Select the remediation action plan from the list.
Issue	Select the record for which Correction action must be performed.
Total actual cost	Enter the actual cost of the correction action.
Implementation date	Select the date when the correction action must be implemented.
Validated date	Select the date when the actions were validated.
Priority	Choose the severity of the correction action from the options: • Critical • Major • Moderate • Minor
State	Choose the state of the correction action: • New • On hold

Correction actions form (continued)

Field	Description
	• In progress • Closed complete • Closed canceled • Closed incomplete
Table	Select the table name for which correction action must be performed.
Remediation item	Select the remediation item record associated with the action.
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the correction action has been assigned.
Short description	Enter a short note.
Description	Enter the detailed description of the correction action.

Containment action form

The containment action form lets you record details of products with quality issues and helps prevent their sale to new customers.

Containment action form

Field	Description
Number	Containment action number is automatically generated. The number starts with CONT and incremented for every new report.
Remediation action plan	Defines how to address issues such as non-compliance, process gaps, or contamination with clear steps.
Issue	Select the record for which containment action must be performed.
Total actual cost	Enter the total cost.
Implementation date	Select the date when the correction action must be implemented.
Validated date	Select the date when the actions were validated.
Priority	Choose the severity of the containment action from the options:

Containment action form (continued)

Field	Description
	• Critical • High • Moderate • Low • Planning
State	Choose the state of the containment action: • New • In review • In progress • Closed complete • Closed canceled • Closed incomplete
Table	Select the table name for which containment action must be performed.
Remediation item	Select the remediation item record associated with the action.
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the containment action has been assigned.
Short description	Enter a short note.
Description	Enter the detailed description of the containment action.

CoPQ expense line form

The CoPQ expense line form enables you to enter the expense line details for product non-conformance..

Field	Description
Number	CoPQ expense line number is automatically generated. The number starts with COPQEXP and incremented for every new report.
Parent	Select the parent. It's used to build the hierarchical categories (parent>child).
Source table	Select the source table (correction action) for which the CoPQ expense line is generated.

Field	Description
Source ID	Select the record number for which the CoPQ expense line is generated.
Issue	Select the product non-conformance or product quality investigation issue type.
Short description	Enter a short note on the expense line.
State	Choose the state of the CoPQ expense line: • Pending • Approved • Rejected • Processed
CoPQ type	Choose the CoPQ type: • Part • Labor • Service • Material • Rework
Summary type	Choose the summary type: • Grow business: Expanding revenue and market reach. • Run business: Streamlining and automating daily sales, support, and service operations for efficiency. • Transform business: Digitally reinventing processes and integrating ecosystems to deliver innovative, agile, and customer-centric manufacturing solutions.
Planned line charge	Defines planned cost line items for CoPQ financial requests, with unit cost, quantity, and type.
Amount	Enter the amount.
Source	
Asset	The identification number of the asset associated with the expense line, if any.
Fixed asset	Fixed asset that contains the asset in this expense line. A fixed asset is a container that holds one or more individual assets, including hardware or software assets. The system auto-populates this field with the appropriate fixed asset if the named Asset is contained within that fixed asset.

Field	Description
Contract	The identification number (not the contract number) of the contract associated with the Asset, if any.
User	The name of the user associated with the Asset, if any.
Configuration item	The name of the configuration item associated with the expense line, if any.
Task	The identification number of the task associated with the expense line, if any.
Cost center	The cost center financially responsible for the item identified in Source ID, if any.

Product quality investigation form

The PQI form enables you to add the investigation details.

Product quality investigation form

Field	Description
Number	Product quality investigation case task number is automatically generated. The number starts with PQI and incremented for every new report.
Issue severity	Choose the severity of the product quality investigation from the options: • Critical • Major • Moderate • Minor
Issue type	Choose the category of the product quality investigation, which helps classify the nature of the issue for accurate tracking and resolution. • Design • Process • Supplier • Material • Logistics • Documentation
Owner	Select the user responsible for the product quality investigation.
Product model	Select the product model.

Product quality investigation form (continued)

Field	Description
Problem solving methodology	Select the type of methodology to solve the problem: • 8D: A comprehensive, team-based approach for complex issues (plan, team, describe, contain, root cause, correct, prevent, recognize) • 4D: A phased a phased approach for solving issues (Describe, contain, correct, close) • Other
State	Choose the state of the PQI. • Draft • New • In progress • Closed complete • Closed canceled • Closed incomplete
Priority	Choose the priority of the PQI.
Assignment group	Organizational units or teams responsible for handling specific tasks, cases, or issues.
Assigned to	User to whom the non-conformance case has been assigned.
Total estimated cost	Enter the total estimated cost of the PQI case.
Total actual cost	Enter the total actual cost of the PQI case.
Short description	Enter a short description on the PQI case.
Description	Enter the detailed description of the PQI.
Escape point	Identify the escape point, which is the nearest stage in the process where the root cause could have been detected but was overlooked.
Report summary	Enter the summary of the PQI report.

Related topics

Create Product quality investigation

Product quality investigation task form

Product quality investigation task form enables you to add the investigation case task details.

Field	Description
Number	Product quality investigation case task number is automatically generated. The number starts with PQIT and incremented for every new report.
Parent	Select the parent. It's used to build the hierarchical categories (parent>child).
Priority	Choose the severity of the non-conformance case task from the options: • Critical • Major • Moderate • Minor
Due date	Select the end date for quality investigation case task.
Short description	Enter a short note.
Description	Enter a detailed description of the product quality investigation.
State	Choose the state of the non-conformance case task. • Pending • Open • Work in progress • Closed complete • Closed skipped • Closed incomplete
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the non-conformance case task has been assigned.

Related topics

Notes form

Stakeholder form

The stakeholders form enables you to add the stakeholder details involved in the issue.

Stakeholders form

Field	Description
Issue	Product quality investigation number for which the stakeholder is associated.
Stakeholder	Select the user involved in solving the issue.
Responsibility	Select the responsibility of the stakeholder.
RACI	Select the role of the stakeholder involved in the issue. • None • Responsible • Accountable • Consulted • Informed

Corrective action form for PQI

The corrective action form enables you to add the details for PQI.

Corrective action form

Field	Description
Number	Corrective actions number is automatically generated. The number starts with CRTV and incremented for every new report.
Remediation action plan	Select the remediation action plan from the list.
Issue	Select the record for which corrective action must be performed.
Total actual cost	Enter the actual cost of the corrective action.
Implementation date	Select the date when the corrective action must be implemented.
Validated date	Select the date when the actions were validated.
Priority	Choose the severity of the corrective action from the options: • Critical • Major • Moderate • Minor
State	Choose the state of the corrective action:

Corrective action form (continued)

Field	Description
	• New • On hold • In progress • Closed complete • Closed canceled • Closed incomplete
Table	Select the table name for which corrective action must be performed.
Remediation item	Select the remediation item record associated with the action.
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the corrective action has been assigned.
Short description	Enter a short note.
Description	Enter the detailed description of the corrective action.

Preventive action form

The preventive action form enables you to add the details for QI.

Preventive action form

Field	Description
Number	Preventive action number is automatically generated. The number starts with PREV and incremented for every new report.
Remediation action plan	Select the remediation action plan from the list.
Issue	Select the record for which preventive action must be performed.
Total actual cost	Enter the actual cost of the preventive action.
Implementation date	Select the date when the preventive action must be implemented.
Validated date	Select the date when the actions were validated.
Priority	Choose the severity of the preventive action from the options:

Preventive action form (continued)

Field	Description
	• Critical • Major • Moderate • Minor
State	Choose the state of the preventive action: • New • On hold • In progress • Closed complete • Closed canceled • Closed incomplete
Table	Select the table name for which preventive action must be performed.
Remediation item	Select the remediation item record associated with the action.
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the preventive action has been assigned.
Short description	Enter a short note.
Description	Enter the detailed description of the preventive action.

Remediation action plan form

Remediation action plan enables you to add the remediation details.

Remediation action form

Field	Description
Number	Remediation action plan number is automatically generated. The number starts with RAP and incremented for every new report.
Name	Enter the name of the remediation action.
Type	Select the remediation action type.
Issue	Select the issue record for which remediation action plan is created.

Remediation action form (continued)

Field	Description
Planned start date	Select the remediation action start date.
Planned end date	Select the remediation action end date.
State	Choose the state of the RAP. • Draft • Pending review • Approved • Rejected • In progress • Closed complete • Closed canceled • Closed incomplete
Priority	Choose the priority of the RAP.
Actual start date	Select the actual start date.
Actual end date	Select the actual end date.
Total estimated cost	Enter the total estimated cost of the RAP case.
Total actual cost	Enter the total actual cost of the RAP case.
Description	Enter the detailed description of the RAP.

CoPQ financial requests form

CoPQ financial form enables you to enter the financial requests raised for the remediation plan.

CoPQ financial request form

Field	Description
Number	CoPQ number is automatically generated. The number starts with COPQFR and incremented for every new report.
Remediation action plan	Select the remediation action plan from the list.
Issue	Select the record for which CoPQ action must be performed.
Total actual amount	Enter the actual cost of the CoPQ financial request action.
Total planned amount	Enter the planned cost allocated to address the issue through the request.
State	Choose the state of the preventive action: • Draft • Pending review

CoPQ financial request form (continued)

Field	Description
	• Partially approved • Approved • Rejected • Closed complete • Closed canceled • Closed incomplete
Parent	Select the parent record.
Priority	Choose the priority of the CoPQ financial requests.
Assignment group	Select the organizational units or teams responsible for handling specific tasks, cases, or issues
Assigned to	Select the user to whom the preventive action has been assigned.
Short description	Enter a short note.
Description	Enter the detailed description of the CoPQ financial requests.

CoPQ planned line charge form

The CoPQ planned line form enables you to add the required details.

CoPQ planned line charge form

Field	Description
Number	CoPQ planned line charge number is automatically generated. The number starts with PLC and incremented for every new report.
State	Choose the state of the preventive action: • New • On hold • In progress • Closed complete • Closed canceled • Closed incomplete
Financial request	Select the financial request that inks planned line charge to the parent CoPQ financial request.

CoPQ planned line charge form (continued)

Field	Description
CoPQ type	Select the CoPQ type, it categorizes the cost as material/part-related or labor-related.
Product model	Select the model type.
Quantity	Enter the quantity of the item/service planned.
Unit of measure	Enter the number of product quantities.
Unit cost	Enter the cost of each product.
Planned cost	Enter the planned cost allocated to address the issue through the request.
Actual cost	Enter the actual cost incurred for the CoPQ request.

Cause action plan form

Cause action plan form enable you to add the cause action details for remediation plan.

Cause action plan form

Field	Description
Number	Cause action plan number is automatically generated. The number starts with IC and incremented for every new report.
External id	Select the external id which is used for mapping with external systems or imported data.
Short description	Enter a brief description of the issue cause.
Description	Enter a detailed description of the issue cause.

General form

General forms used in MCO.

Notes form

Notes form enables you to add the watch list details.

Field	
Watch list	Add names of users who receive notifications and can view the case task.
Watch notes list	Add names of users who receive notifications and can view the work notes of the case task.
Work notes (Private)	Enter the work notes.
Additional comments (Customer visible)	Enter additional comments for customer, if any.

Resolution information form

To be done.

Field	Description
Closed by	Select the user who closed the report.
Closed	Select the date on which the report is closed.
Close notes	Enter note, if necessary.

Effectiveness form

To be done.

Field	Description
Effectiveness result	Outcome of effectiveness review.
Effectiveness review date	Date on which the action plan's effectiveness is formally reviewed.
Effectiveness reason code	Reason why the plan was not fully effective (if applicable).
Effectiveness notes	Additional notes on review result, failures, or supporting evidence.

Discuss form

The Start a Sidebar discussion form enables you to start a discussion.

Discuss form

Field	Description
Record number	Enter the record number on which you want to initiate the discussion.
Subject	Enter the primary area of discussion.
Add participants	Add user who should be part of the discussion.
Include a brief message for participants	Enter a brief note.
Private discussion	Select this option to make the discussion private. **Start private discussion** option is enabled.

Domain separation for MCO

Domain separation is supported for Manufacturing Commercial Operations. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including the users who can see and access data.

Support level: Standard

- Includes all aspects of **Basic** level support.
- Application properties are domain-aware as needed.
- Business logic: The service provider (SP) creates or modifies processes according to customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must configure the minimum viable product (MVP) business logic and data parameters according to the tenant as expected for the specific application.

Sample use case: An admin must be able to comment when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

Domain separated tables

Note:
All Manufacturing Commercial Operations tables support domain separation.

Now Assist for Manufacturing Commercial Operations

Use the ServiceNow® Now Assist for Manufacturing Commercial Operations application to create the corrective actions and charges information for the dealers.

Troubleshoot and get help

- ServiceNow Community on AI and 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.

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

Using agentic workflows in Now Assist for Manufacturing Commercial Operations (MCO)

Use the MCO AI agents within an agentic workflow to extract relevant data from repair documents, enabling the generation of corrective actions and associated charges.

Available agentic workflow for Manufacturing Commercial Operations agent collection

Agentic workflow name	Description	Available AI agents
Execute recall campaigns faster	This workflow enhances the efficiency of recall execution by automatically creating corrective action records and corresponding charge line items using repair documents. The elimination of manual data entry and validation processes reduces cycle time, minimizes errors, and promotes consistency throughout recall operations.	Create recall corrective actions AI agent

Enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. For more information, see Implement access control in Now Assist AI agents

Important:
By default, all agent workflow 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. The triggers for each agentic workflow must be unique. If you prefer to invoke it manually, activating the trigger isn't necessary.

Related topics

Explore Now Assist AI agents

Execute recall campaigns faster Agentic Workflow

Large language models on the ServiceNow AI Platform®

Execute recall campaigns faster Agentic Workflow

Use MCO AI agents agentic workflow to generate the corrective actions and charges for the required repair documents quickly and efficiently.

Before you begin

Role required: sn_rcl_claim_mgmt.recall_manager

About this task

The Execute recall campaigns faster workflow uses the Create Recall Corrective Actions AI agent to streamline recalls by automatically extracting information from uploaded repair documents. This agent systematically identifies and gathers all relevant data from the repair instructions, reducing the need for manual input. As a result, corrective actions are created efficiently, and related charges are calculated accurately. This automation speeds up the process and helps minimize human error.

The recall manager can initiate a recall campaign and associate repair instruction documents with the campaign record. When prompted to add documents, the AI agent requests you to select from the available attachments. You can select the relevant documents. Also, you can upload the additional documentation necessary for implementing corrective actions.

The asset applicability criteria specify which corrective actions apply to a specific subset of the affected asset.

Procedure

1. Navigate to **AllWorkspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management**.
2. Create a recall campaign record.
3. Select the Now Assist icon ✦ to launch the Now Assist panel.
4. Submit a request to initiate a corrective action.
   The orchestrator activates the Create Recall Corrective Actions AI Agent, prompting you to proceed with the creation of the corrective action.
5. The agent prompts the user to upload the repair documents required for generating the corrective actions.
6. The agent reviews the uploaded documents.

   Note:
   If information is missing, the agent displays an error message and provides clear instructions for resolution.

   This process is repeated until all the required information is provided.
7. The agent generates the corrective action and associated charges.
   All the corrective actions are generated along with the different charges (labor, part, miscellaneous, and external services).

Related topics

- Create a campaign
- Activate an agentic workflow template
- Duplicate an agentic workflow
- Modify an agentic workflow