Yokohama 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.

Explore Learn how Manufacturing Commercial Operations can help you with its key features and benefits.	Data Model Framework for workflow integration.	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.	

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 Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring 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.

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.

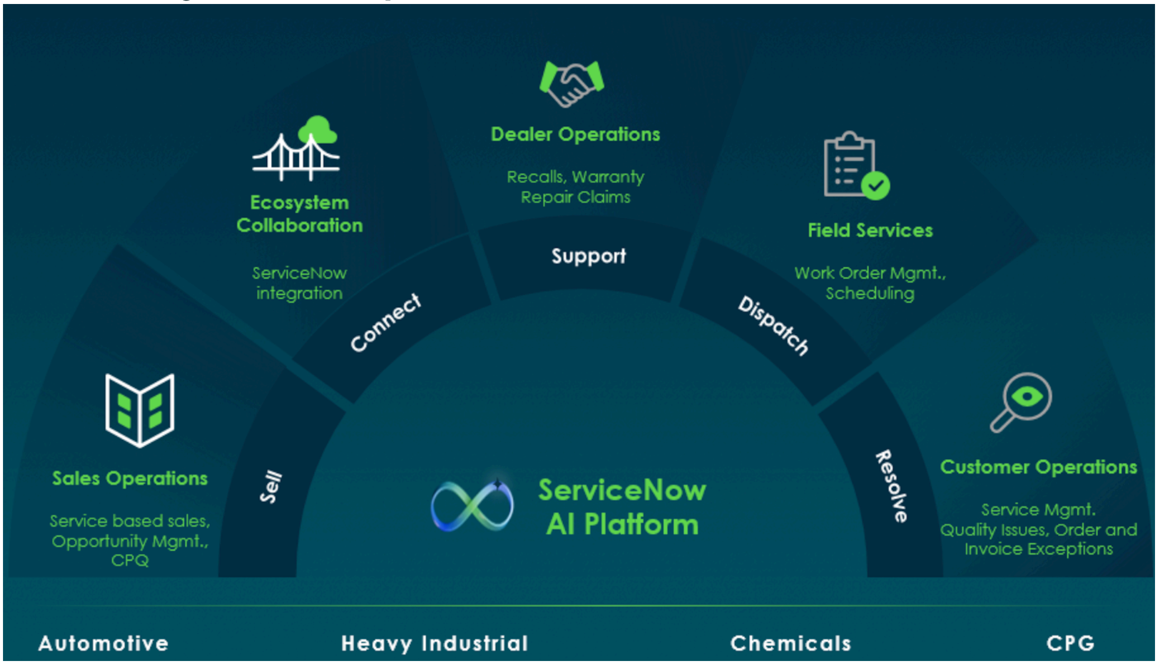
Users (continued)

User	Description
	• 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.
Dealer Service Advisor	Create, view, update, and cancel a repair claim case.

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 Operation workflow



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
Provide dealers a single unified experience to collaborate with New dealer portal. It's a guided experience to submit, edit, and track claims.	Manufacturing Commercial Operations 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

Components (continued)

Benefit	Feature
	See, Additional features
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 Manufacturing Commercial Operations

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.

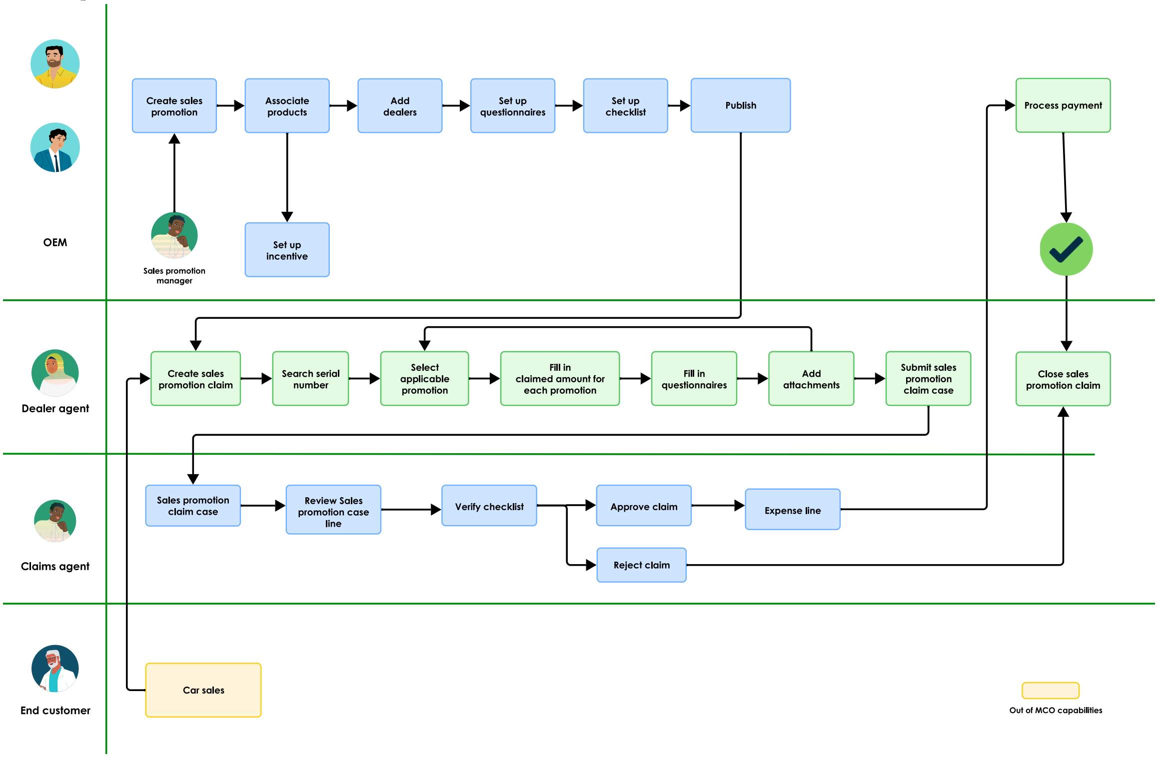
Sales promotion

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



Sales promotion entities

Entity	Description
Create sales promotion	OEM creates the sales promotion campaign.
Associate products	OEM adds the products applicable for the sales promotion campaign.
Set up incentive	Set up the incentive for the dealers.
Add dealers	Add the dealers who are eligible for the sales promotion campaign.
Set up questionnaires	Configure the promotion questionnaires.
Set up checklist	Configure the checklist template.
Publish	OEM publishes the sales promotion campaign for the applicable dealers.
Create sales promotion claim	Dealer agent creates the promotion claim for the applicable customers.
Search serial number	Add the product, which is applicable for sales promotion campaign.
Select applicable promotion	Select the applicable promotion from the list of promotions.
Fill in claimed amount	Update the claimed amount for the selected promotion.
Fill in questionnaires	Update the promotion questionnaires.
Add attachments	Add the attachments, if necessary.

Sales promotion entities (continued)

Entity	Description
Submit claim case	Dealer agent submits the claim to OEM.
Sales promotion claim case	Claims agent can view the list of sales promotion submitted by dealer.
Review sales promotion case line	Claims agent reviews the claims.
Verify checklist	Verifies the checklist.
Approve	Approves the claims if it matches all the required criteria.
Expense line	Expense line is generated for the approved claims.
Process payment	Payment is processed.
Close sales promotion claim	Claim is closed.
Reject claim	Rejects the claims if it doesn't match the required criteria.

Related topics

Sales Promotion Campaign claims

Set up sales promotion

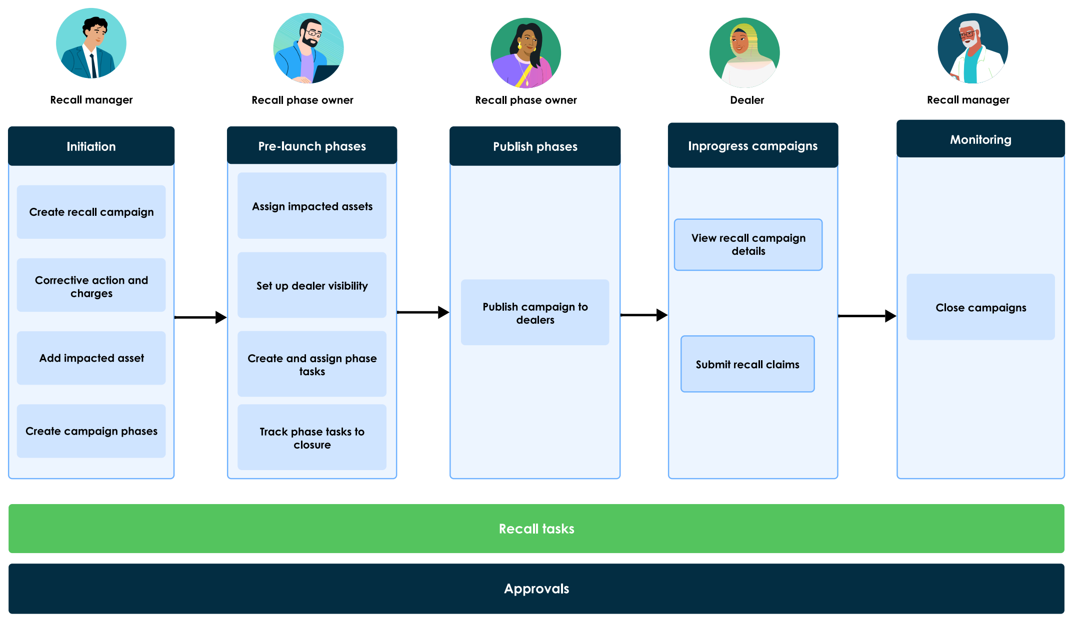
Sales promotion management

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



Recall campaign workflow entities

Entity	Description
Create recall campaign	Recall manager creates the recall campaign.
Corrective action and charges	Dealer enters the parts and software asset details for which the claim is raised.
Add impacted	Recall manager adds the assets that are impacted for the recall campaign.
Create campaign phases	Recall manager creates the campaign phases based on the location or the dealer.
Select dealers included	OEM selects the dealers who are impacted by the recall campaign.
Publish campaign to dealers	Recall phase owners sends the campaigns to the dealers.
View recall campaign details	Dealers can view the recall campaign details created by recall manager.
Submit recall claims	Dealer submits the recall claims.
Close campaigns	Recall manager closes the recall campaigns.

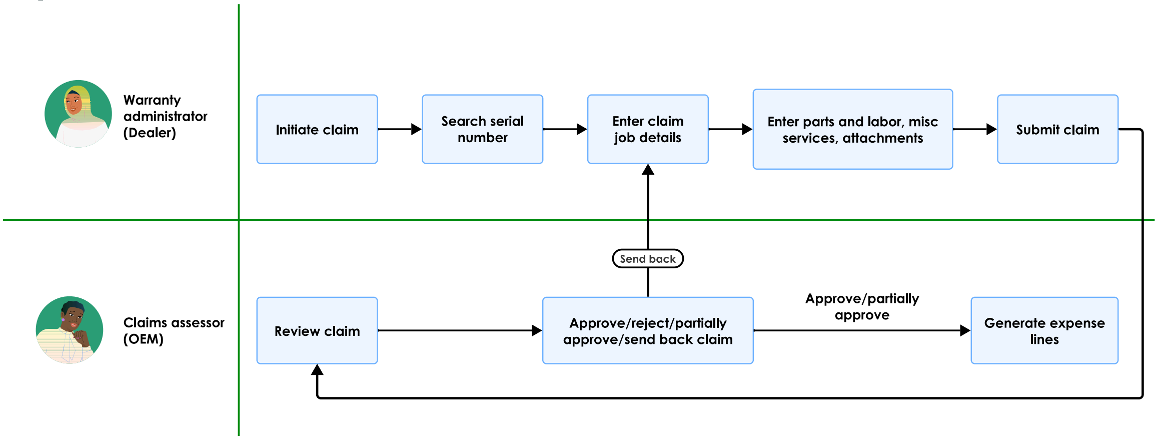
Related topics

Recall campaign data model

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



Repair claim workflow entities

Entity	Description
Initiate claim	Dealer initiates the warranty or recall claim.
Search serial number	Dealer can search the claim details based on the serial number.
Enter claim job details	Dealer enters the job details in the dealer portal.
Enter parts and labor code	Dealer enters the labor code and parts in the dealer portal.
Submit claim	Dealer submits the claims request to the OEM.
Review claim	OEM reviews the claims request submitted by the dealer.
Approve claim	OEM reviews the claims and either approves, rejects, partially approves, or send backs the claim.
Generate expense line	Claims agent process the expense line and is generated only for approved or partially approved claims.

Related topics

- Repair claims
- Repair claim
- Submit a repair claim for warranty
- Submit a repair claim for recall

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 Manufacturing Commercial Operations
- Set up sales promotion
- Agent management

Manufacturing Commercial Operations 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:

Components of the Dealer Portal landing page (continued)

Tabs/Fields	Description
	• 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. **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 portal

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

Additional feature list (continued)

Feature	Description
	With Order to cash operations for Manufacturing Commercial Operations, manufacturers can: • 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

Additional feature list (continued)

Feature	Description
	• 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 other product applications

Configuring Manufacturing Commercial Operations

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 Manufacturing Commercial Operations plugins are automatically installed.

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

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
Installing 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 proactive services to customers.
Install and configure Order Management 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 with Manufacturing Commercial Operations Mandatory	Install the Order Management application from the ServiceNow Store.

MCO configuration tasks (continued)

Configuration task	Description
Configure 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 and configure 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.
Install and configure Service Exchange 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 with Manufacturing Commercial Operations	Install Manufacturing Commercial Operations.
Set up additional requirements (optional)	Set up additional Manufacturing Commercial Operations requirements.

Getting started with Manufacturing Commercial Operations

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

Activating plugins

Plugin	Description
Install Manufacturing Commercial Operations	As an admin, activate the MCO plugin. This plugin includes demo data and activated related plugins.

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Activating plugins (continued)

Plugin	Description
Plugins installed with Manufacturing Commercial Operations	Refer to the list of related MCO plugins that are activated after you activate the MCO plugin.

Install Manufacturing Commercial Operations

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

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

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 Manufacturing Commercial Operations.

For more information on the components, see Components installed with Manufacturing Commercial Operations Core.

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]

   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 Manufacturing Commercial Operations

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	Manage all the entities and flows related to Repair Claims within MCO.

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Manufacturing Commercial Operations Plugins (continued)

Feature	Plugins	Description
	[sn_repr_claim_mgmt]	
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.

Set up additional requirements (optional)

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

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

Installing 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.
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 in Sales Customer Relationship Management for Manufacturing Commercial Operations

Configure the business portal to allow 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. Uncheck the box next to **Inactive**.

   Note:
   The Business Portal is inactive by default.

5. Select **Update**.

Result
The Business Portal is now active.

Install and configure Order Management

Set up the 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 life cycle, such as order capture and fulfillment, contracts, and entitlements.

To configure Order Management application, see Install and configure Order Management.

Installing and configuring Order Management applications

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

Order Management configuration tasks

Configuration task	Description
Configuring product offerings and catalogs	Create product offerings and the associated product catalogs that can be used by Order Management agents for pre-sales activities, order capture, and post-sales engagement.
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

Order Management configuration tasks (continued)

Configuration task	Description
	offerings. Product pricing is used by your sales and order agents when creating opportunities, quotes, and sales orders in Sales CRM.

Install and configure Service Exchange for Providers and Consumers

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

Note:
Service Exchange 2.x.x that is being released with the Yokohama 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 Yokohama release, you must follow instructions in the Service Bridge for Providers (Legacy) - Migration Utility (KB1499823) to migrate your configuration data.

To configure Service Bridge for Providers, see Installing and configuring Service Exchange for Providers.

To configure Service Bridge for Consumers, see Installing and configuring Service Exchange for Consumers.

Set up Manufacturing Commercial Operations

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.
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.
	Provides the details to create the dealers.

Create a warranty contract

Define the warranty covered for the products sold to the customers.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Warranty Contracts**.
2. Select **New**.
3. On the Contract form Contract form, fill in the fields.
4. Select **Save**.
   The Entitlements, Assets Covered, Terms and Conditions, Contracts, Cases, and Products Covered related lists are displayed.
5. On the Products Covered related list, select **Edit** to associate sold products to the contract.
   The list of sold products displayed is filtered based on the account. Select **Run filter** to see a list of all sold products, but you can only add the sold products that belong to the account selected or to the account hierarchy.
6. Select **Submit**.
   You can also select **Submit For Review** to place the contract in the Draft state and send an email to the approver to review the contract.

Related list for a warranty contract

In the Manufacturing Commercial Operations application, you can use the Warranty contracts related list to track information that is related to the warranty contract hierarchy, cases, entitlements, and other entities.

Related item for warranty contract

Related list	Description
Create an entitlement	List of entities, such as accounts, customers, or products.
Create an asset	List of assets associated with the warranty contract.
Create terms and conditions for a contact	List of terms and conditions associated with the customer or product.
Create a contact	List of contact details.
Create a case	List of cases raised for an account, customer, or product.

Create an entitlement

Create an entitlement for a Manufacturing Commercial Operations entity, such as an account, consumer, or product.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Warranty Contracts** > **Entitlements**.
2. Select **New**.
3. Fill in the fields on the Entitlement form.
4. Select **Submit**.

Related topics

[Associate an entitlement with a Customer Service Management entity]

Create an asset

Create an asset and Associate it with contacts.

Before you begin

Role required: admin

Procedure

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

Asset covered form

Field	Description
Contract	Contract name.
Asset	Asset that is covered under the contract.
Date added	Date when the asset is added to the contract.
Date removed	Date when the asset is removed from the contract.

4. Select **Submit**.

Related topics

[Add an asset to a contract]

Create terms and conditions for a contact

Create a term and conditions record to add to a contract.

Before you begin

Role required: admin

Procedure

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

Terms and Conditions form

Field	Description
Contract	Link to the contract.
Order	Order id.

Field	Description
Terms and Conditions	One or more terms and conditions associated with the contact. Options include: ◦ Standard NDA ◦ Government Law

4. Select **Submit**.

Related topics

Terms and conditions

Create a contact

Create a contact, and enter the contact number for that contact.

Before you begin
Role required: admin

Procedure

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

Contract form

Field	Description
Contract	Contract number list.
Contact	Contact number

4. Select **Save**.

Create a case

The Case form enables you to view the detailed information about a customer issue or problem. It includes phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

Before you begin
Role required: admin

About this task
As an agent, create a case to identify a customer's question or issue and to track the activities related to resolving the issue. Use a case to track communication to and from the customer, including the communication channels being used.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **MCO Setup** > **Warranty Contracts** > **New Case**.
2. Select **New**.

3. On the Case form, fill in the fields. .
   For a description of the field values, see Case form.
4. Select **Save**.

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

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
	List of child install based items.
	List of sold products associated with the install base items.

Related list	Description
Create an entitlement	List of entities, such as accounts, customers, or products
Create a case	List of cases raised for an account, customer, or product.
	List of sold products.

Set up dealer

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

Configure Partner Relationship Management

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 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.
	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.

Field	Description
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

Exploring 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 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. Fill in the fields on the MCO input attributesform, as appropriate.
4. Select **Save**.

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

Managing case types in Manufacturing Commercial Operations

Manage the settings and the configuration for a case type from the Case Type form.

After using the Manufacturing Commercial Operations Guided Setup to create and configure a case type, you can view and manage the settings and configuration for the case type from the Case Type form. To access a Case Type form, navigate to **Customer Service > Case Types > Manage Case Types** and select a case type from the list.

Case Type form related lists

The Case Type form related lists display items configured for the case type table. Use the related lists to create additional configurations.

- Record Producers
- State Flows
- Special Handling Notes
- SLAs
- Email Templates
- Quick Messages
- Reports
- Case Type Selections

Case Type form related links

Related link	Description
View Case Type Configuration	Displays the current configuration for this case type, including: • Business rules • Client scripts • Dictionary entries and overrides • Notifications • UI actions • Access controls • UI policies • Data policies • Styles • View rules • Flows
Launch Guided Setup for Case Types	Goes to the Case Types setup tasks in Manufacturing Commercial Operations Guided Setup.

Using Manufacturing Commercial Operations

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

Using Service Exchange with Manufacturing Commercial Operations enables manufacturers to connect with B2B customers, suppliers, channel partners, or third party logistics partners (3PLs), and within the company across multiple divisions.

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**.

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

Submit a sales promotion single 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. Fill in the required fields.
6. Select **Submit**.

Result

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

Upload a bulk sales promotion claim request

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. Fill in the Sales promotion bulk upload form fields in the downloaded template.
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 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 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** > **Lists** > **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 repair claim.

2. From **Activities**, select **Review & approve**.
3. From the drop-down 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 repair claim.

2. 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 repair claim.

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

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

4. Process the claim.

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 repair claim.

2. Select **Review & approve** from **Activities**.
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
My campaigns	Displays all the recall claims that are assigned to the person logged in to the workspace.
All campaigns	Displays all the recall claims that are assigned to the OEM.
My campaign phases	Displays all the recall campaign phases that are assigned to the person logged in to the workspace.
All campaign phases	Displays all the recall campaign phases that are assigned to the OEM.

My campaigns

My campaigns display the claims assigned to the person who has logged in to the workspace.

Before you begin
Role required: admin

Procedure

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

Related lists for my campaigns

In the Manufacturing Commercial Operations workspace, you can use 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.
Identify 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.

Campaign tasks

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

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaigns** > **Campaign Tasks**.
2. Select **New**.
3. Fill in the required Campaign tasks form form fields.
4. Select **Save**.

Corrective actions

Identify the asset. Address the asset issue, either by eliminating or replacing the asset.

Before you begin

Role required: admin

Procedure

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

Correct action form

Fields	Description
Number	Corrective action number that is automatically generated. The number starts with CA.
Name	Name of the corrective action.
Affected part	Details of 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.
Remedy type	Remedy type specifies the corrective action as to what type of correction is being performed.
Impacted asset applicability	List of assets that are impacted.
Details	Brief detail about the corrective actions.

4. Select **Save**.

Identify an impacted asset

Identify an impacted asset that needs to be replaced or recalled.

Before you begin

Role required: admin

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.

Fields	Description
Install base	Install base item.

4. Select **Save**.

Recall a campaign phase

Agents workspace enables the manufacturers to create a recall campaigns for a specific geography or a dealership.

Before you begin
Role required: admin

Procedure

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

All campaigns

All campaigns form enables OEM agents to create or view all the recall campaigns.

Before you begin
Role required: admin

Procedure

1. **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **All Campaigns**
2. Select **New**, to create recall campaign.

   To create recall campaigns, see My campaigns.

My campaign phases

Recall campaign phase displays the claims assigned to the person who has logged in to the workspace.

Before you begin
Role required: admin

Procedure

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

Phase task

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

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** > **Lists** > **Recall Management** > **My Campaign phases** > **Phase task**.
2. Select **New**.
3. Fill on the required phase task Phase task form fields.
4. Select **Submit**.

All campaign phases

Agent workspace enables OEMs to create or view all the recall campaign phase claims assigned to 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 recall campaign phase by referring to.My campaign phases

Sales promotion management

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

Tasks	Description
My promotions	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.

My promotions

Agents workspace enables OEM to create the sales promotions campaigns. 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.
7. 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

Related list for my promotions

To be done.

Related list	Description
Create an applicable product	
Create a visibility criteria	
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 will be applied.
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

Agents workspaces enables the manufacturers to create the visibility criteria. 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

To be updated.

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

To be updated

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	
Requested by	
Consumer	
Dealer	
Sales price	

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 claims	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. Select **Review & approve** from **Activities**.
3. Select ✓
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 claims

Reject a claims 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. Select **Review & approve** from **Activities**.
3. Reject the claims by selecting ✕ .
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. Select **Review & approve** from **Activities**.
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**.

Additional workflows

Additional workflows installed with the Manufacturing Commercial Operations.

Customer Service Management for MCO

Agents and managers can use 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.

Sales Customer Relationship Management for Manufacturing Commercial Operations

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

Use Sales Customer Relationship 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 Sales Customer Relationship Management order table.

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, allowing them to configure products and place orders independently via a self-service portal. The portals provides ready to use features that require minimal setup. These include:

- Header and footer with links for different customer activities.
- Home page provides a summary of essential items to the logged-in user.
- Hierarchical menu to systematically navigate to 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 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 Bridge 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 Bridge to submit requests from the service catalog, all from your ServiceNow® instance.

Manufacturing Commercial Operations reference

Reference topics provide additional information about Manufacturing Commercial Operations.

Customer Service Management reference	Order Management Reference	Service Bridge reference
Reference topics provide additional information about the Customer Service Management for Manufacturing Commercial Operations application.	Reference topics provide additional information about the Order Management for Manufacturing Commercial Operations application.	Reference topics provide additional information about the Service Bridge for Manufacturing Commercial Operations data model and configurations.

Components installed with Manufacturing Commercial Operations Core

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

Manufacturing Commercial Operations Core roles (continued)

Role	Contains roles
	• 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_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_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_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

Manufacturing Commercial Operations Core roles (continued)

Role	Contains roles
	• sn_sls_prm_clm_mgt.sales_promotion_claim_creator • sn_customerservice.customer_case_manager
sn_rcl_claim_mgmt.recall_manager	• sn_rcl_claim_mgmt.campaign.creator • sn_mfg_cmn.navigation_menu
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_mfg_cmn.navigation_menu • sn_rcl_claim_mgmt.campaign_phase.writer

Related topics

Exploring Manufacturing Commercial Operations

Data model of Manufacturing Commercial Operations

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 portal

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 sales dealer agent 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. 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

Table names for Dealer plugin (continued)

Table	Description
	services. For example, franchises and dealerships.
Channel Partner [sn_prm_channel_partner]	Stores the channel partner information such as name, contact details.
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 claims

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 Claims 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 OEM during the claim request. 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.

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

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.

Table names for repair claim plugin (continued)

Label	Description
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

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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
- Service Organization Criteria

The recall claim plugin adds the following tables.

Table names for recall claim plugin

Recall Campaign [sn_rcl_claim_mgmt_rcp]	It is the parent table and stores the Recall campaign initiative information.
Recall Campaign Task [sn_rcl_claim_mgmt_campaign_task]	Stores the task information that must be fulfilled in order 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.

Table names for recall claim plugin (continued)

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.

Contract form

Warranty contract covered for the products sold to the customers

Contract form

Field	Definition
Number	Contract number that is automatically created.
Account	Name of the account associated with this contract.
Consumer	Name of the consumer associated with this contract.
Contract administrator	Individual who is responsible for managing the contract.
Approver	User who approves or rejects the contract.
Contract number	Number assigned to the contract by the customer.
State	Current state of the contract.
Substate	Progression of records through different stages of a workflow.
Start date	Date when the contract starts.
End date	Date when the contract ends.
Name	Name of the contract.

Entitlement form

Entitlement form enables you to add the details to create account, consumer, or product.

Entitlements form

Field	Definition
Name	The nName of the entitlement.
Product	The p<roduct model that is associated with this entitlement.
Account	The nName of the account that is associated with this entitlement.
Consumer	NThe name of the consumer that is associated with this entitlement.
Contract	The cContract number that is associated with this entitlement.
Asset	The aAsset tag number or the serial number of the asset that is associated with this entitlement.
Active	Check this boxOption to enable the entitlement. Active entitlements are available for selection when creating a case.
Channel	One or more communication channels associated with this entitlement. Options include: • Alert • Community • ebonding • In person • Phone • Email • Web • Virtual Agent • Chat
Business hours	The sSchedule associated with this entitlement.
Start date	The sStart date for this entitlement.
End date	The eEnd date for this entitlement.
Total Units	TThe total number of units designated for this entitlement. This field is active if the **Per unit** check boxfield is enabled.
Remaining Units	The nNumber of available units that are remaining for this entitlement. This field is active if the **Per unit** check boxoption is enabled. This field is updated using business rules. • To use cases as the unit type, the **Update case entitlement on Close** business rule updates this field when a case for a product, asset, company, or contract that has an associated entitlement is closed. • To use hours as the unit type, customers must create a separate business rule. For example, create a rule that is applied to the amount of time an agent spends on a case. When a case is resolved, deduct the hours spent from the total service hours available in the entitlement.
Unit	The tType of unit being measured for this entitlement. Options are: **Cases** or **Hours**.

Entitlements form (continued)

Field	Definition
Per unit	Select this check boxOption to enable unit counters. If enabled, the **Total Units** and **Remaining Units** fields are activated.
Install Base Item	The install base item associated with the entitlement. **Note:** Configure the form layout to add the **Install Base Item** field.
Sold Product	The sold product associated with the entitlement. **Note:** Configure the form layout to add the **Sold Product** field.

Case form

The Case form enables an agent to associate and store the related information, such as the customer's name, phone number, and company; account information; product and asset information; service contract and entitlement details.

Agent view

The agent view of the Case form includes the following components:

- A timeline that provides a visual display of case activities.
- Referenced entities for the case, including account and contact information, product and asset information, service contract and service entitlement details.

Agents and managers can view a Case form by navigating to **Customer Support** > **Cases** and selecting one of the following menu options:

- **My Cases**
- **All**
- **Open**
- **Unassigned**
- **Escalated**

From the Case list, select a case number to display the Case form.

Case form (agent view)

Field	Description
Number	Automatically assigned case number.
Channel	Method by which the customer-initiated contact and the case were opened. • Web (default) • Phone • Email • Chat

Case form (agent view) (continued)

Field	Description
	• Social • Community • Alert • Virtual Agent
Account	Name of the contact's company. This field is automatically filled if the information is available in the contact record.
Contact	Name of the customer contact for this case.
Service Organization	Name of business location.
Requesting Service Organization	Service organization for which this case is being requested.
Product	Product model of the asset. A model is a specific version or configuration of an asset. For example, Apple Mac Book Pro. If you select an asset in the **Asset** field and the asset has an associated product, the **Product** field is automatically updated. A product can be associated with multiple assets.
Asset	Asset tag number or the serial number of the asset involved in this case.
Install base	The Install base field helps you track of: • which products and services have been purchased by a customer • how they've been installed or provisioned • detailed configuration for each installed item.
Partner Contact	Name of the partner contact for this case.
Short description	Brief description of the issue or problem.
Opened	Date and time when the case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assignment group	Assigned customer service agent group.
Assigned to	Assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.

Case form (agent view) (continued)

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Contract</td><td>Contract number associated with this case.</td></tr>
<tr><td>Entitlement</td><td>Entitlement associated with this case. The entitlements available for selection in the reference list channel matches the case creation channel. The available entitlements are filtered by the settings in the Account, Contract, Product, Asset fields.

If only one entitlement is available for this case, it’s automatically added to the Entitlement field.</td></tr>
<tr><td>Partner</td><td>Name of the partner company.</td></tr>
<tr><td colspan="2">Notes</td></tr>
<tr><td>Watch list</td><td>Users who receive notifications about this case when additional comments are added or if the state of a case is changed to Resolved or Closed.</td></tr>
<tr><td>Work notes list</td><td>Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list.

To enable notifications for users in the Work notes list field, do the following:
1. Navigate to the Notifications (sys_notification) table.
2. Select Case Action Status.
3. In the Who will receive tab, do one of the following:
◦ Add a user in the Users field.
◦ In the Recipients listed in fields field, add the Work notes list field.
4. Select Update.</td></tr>
<tr><td>Contributor Users</td><td>When a user with the case task agent role is assigned to a case task, the user is added to the Contributor Users field.

If this user is removed from the Assigned to field on the Case Task form, and they aren’t assigned to any other tasks for the case, then they’re also removed from the Contributor Users field.</td></tr>
<tr><td>Contributor Groups</td><td>When a user with the case task agent role is assigned to a case task, the user's assignment group is added to the Contributor Groups field.

If this user is removed from the Assigned to field on the Case Task form, and no other member of their assignment group is assigned to any task for the case, then the assignment group is removed from the Contributor Groups field.

If a group is removed from the Assignment group field on the Case Task form, and the group isn’t assigned to any other tasks for the case, then the assignment group is removed from the Contributor Groups field.</td></tr>
<tr><td>Additional comments</td><td>Customer-viewable comments. Each comment is inserted into the Activity field when the user selects the Post button.</td></tr>
<tr><td>Work notes (Private)</td><td>Information about how to resolve the case, or steps taken to resolve it, if applicable.</td></tr>
</table>

Case form (agent view) (continued)

Field	Description
	Internal users who have been added to the Work notes list receive the Case work notes added notification containing the work notes when added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Resolution Information	
Closed by	Name of the user who closed the case.
Resolution Code	List indicating the resolution states for the case. This field is required when an agent proposes a solution for a case.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is required if a customer service agent or agent manager closes a case. If a customer closes a case, it isn't required.
Add resolution notes to comments	Option to determine if the resolution notes are added to customer-viewable comments when the case is resolved. If selected, the resolution notes are added to the **Additional comments** (customer-visible) field.
Closed	Date and time that the case was closed.

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

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.

Install Base Item form (continued)

Field	Description
	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.
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]

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.
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.

Internal business location form (continued)

Field	Definition
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.

MCO input attributes

MCO input attributes form.

MCO Input Attributes form

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.

MCO Input Attributes form (continued)

Field	Definition
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.
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.

My promotions form

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

My promotions form

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. Choose an option from the list. To create promotion type, see Create promotion type.

My promotions form (continued)

Field	Description
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

My promotions

All promotion form

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

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.

Field	Description
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
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

Claim details form

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

Fields	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.

Fields	Description
Reported date	Date on which the claim is being raised.
Work order	String value.

Related topics

- Roles and components of Partner Relationship Management
- Submit a repair claim for warranty
- Submit a repair claim for recall

Repair claim form

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

Fields	Description
Warranty	
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.
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 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

Fields	Description
	available on the corrective action but can be modified by the service agent.
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.

Fields	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

Channel partner form

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

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

Related topics

Create a channel partner

Sales promotion bulk upload form

Bulk sales promotion upload form.

Bulk upload form

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

Recall campaign form

The recall campaign form enables the OEM to create a recall campaign.

Fields	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	Product state. This field is automatically fetched based on the product number.
Recall type	Recall issue type. Options are: • 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

Fields	Description
	• 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

My campaigns

All campaigns

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	Description
Number	Corrective action number that is automatically generated. The number starts with CA.
Name	Name of the corrective action.
Affected part	Details of 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.
Remedy type	Remedy type specifies the corrective action as to what type of correction is being performed.
Impacted asset applicability	List of assets that are impacted.
Details	Brief detail about the corrective actions.

Campaign tasks form

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

Campaign task form

Fields	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 • 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.
Work notes	Additional information, if any.

Recall campaign phases form

Recall claims form enables you to add the recall campaign phases details.

Fields	Description
Number	Recall campaign phase number that is automatically generated. The number starts with RCPPH.
Name	Recall campaign phase name.
Planned start date	Planned start date of the recall campaign.
Planned end date	End date of the recall campaign.
Recall campaign	Recall campaign name.
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.

Fields	Description
Assigned to	Name of the person to assign the recall campaign phase.
Impacted asset eligibility	List of assets that are impacted.
Dealer visibility	Service organization criteria to whom this recall campaign phase is visible.
Description	Brief description about the recall campaign phase.

Related topics

All campaign phases

My campaign phases

Phase task form

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

Phase task form

Fields	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: • 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.

Phase task form (continued)

Fields	Description
Short description	Short description of the phase task.
Description	Detailed description of the phase task.
Work notes	Additional notes, if required.

Domain separation for Manufacturing Commercial Operations

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 which users 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 make comments required 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.

Components installed with other product applications

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