



Washington DC Retail Industry

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Company Headquarters
2225 Lawson Lane
Santa Clara, CA 95054
United States
(408) 501-8550






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Retail Operations

The ServiceNow® Retail Core application empowers managers and associates to manage daily retail operations by automating tasks and resolving issues quickly with self-service, freeing up time to serve customers. It enables seamless two-way communication and visibility between stores and HQ, delivering a great customer experience while enhancing staff productivity and reducing costs.

Get started

<p>Explore</p>  <p>Learn more about the benefits of Retail Operations Core and how it's used.</p>	<p>Configure</p>  <p>Install Retail Operations Core and configure your environment.</p>	<p>Request</p>  <p>Create support requests for your retail organization.</p>
<p>Resolve</p>  <p>Resolve and track retail support requests.</p>	<p>Reference</p>  <p>Get details about Retail Operations Core components such as fields, tables, and properties.</p>	

Troubleshoot and get help

- [Ask questions and explore other resources for Retail Operations in the ServiceNow Community](#)
- [Search the Known Error Portal for known error articles](#)
- [Contact Customer Service and Support](#)

Exploring Retail Core

Whether you're starting or expanding your implementation of the Retail Core application, learn more about the features available to optimize your retail organization.

Retail Operations Core overview

The ServiceNow® Retail Core application streamlines operations and optimizes communication within retail organization locations and with headquarters. By building on the existing functionalities of Customer Service Management and Field Service Management, this application optimizes workflows, improves coordination, and supports both frontline and backend operations to run smoothly and efficiently.

Retail Core helps you accomplish the following:

- Enable frontline employees and managers to report issues on behalf of the stores they're associated with.
- Help reduce calls to the call center, reduce or eliminate truck rolls, and enable store-based case management.
- Get better visibility into store performance, which can also drive improvement in Service Level Agreement (SLA) metrics for store support.

Retail Core users

Users

User	Description
Store Associate	Store associates perform store tasks, organize the store, are often the first to notice and report issues, and engage with customers.
Store Manager	Store managers manage the store, address issues, or request help from the central operations team if needed. They step in to contact local vendors if issues aren't resolved in time and manage staff and schedules.
Regional Manager	Regional managers oversee multiple retail locations, staying aware of issues and their resolution status across the area's hierarchy.
Area Manager	Area managers, also called market managers, oversee multiple regions and stay aware of issues and resolution status across their store hierarchy.
Central Operations Support	Central Operations Support addresses store questions and needs, performs issue resolution, and interfaces with company field staff or third-party vendors in coordination with Store Manager. They're responsible for creating tasks and standard operating procedures, acting as the fulfilling agent for cases routed to them, including those related to security, IT Service Management (ITSM), and Central Customer Support.

Retail Core workflow

Retail Core



Retail Core workflow

1. The administrator configures the Retail Core application.
2. The store manager raises a case at a retail location.
3. A retail case is created.
4. The store associate investigates the issue and provides a report, documented within the case.
5. The store manager reviews the investigation report details and then closes the case.

Retail Core benefits

Retail Operations benefits

Benefit	Feature	Users
Digitize retail organization information and streamline the setup experience.	Retail data model	Admin
Automate retail operations by enabling support request creation and fulfillment.	Retail case	Store Associate, Store Manager

What to explore next

To learn more about configuring and using Retail Core, see:

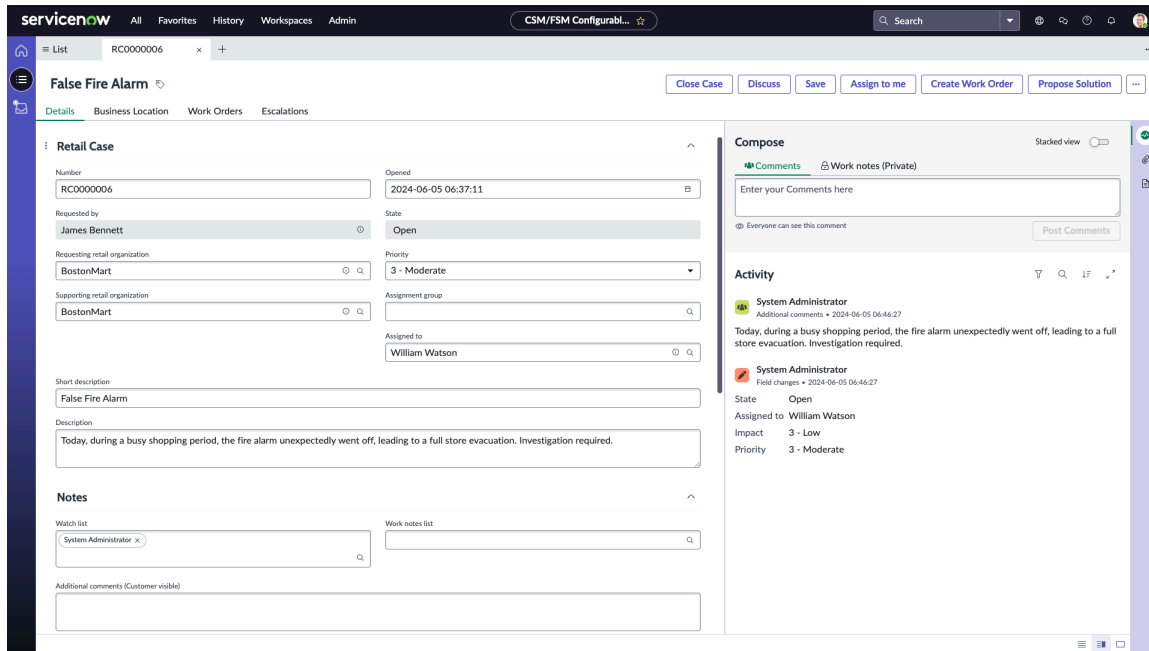
- [Configuring Retail Core](#)
- [Creating support requests for your retail organization](#)
- [Resolving support requests for your retail organization](#)
- [Retail Operations Core reference](#)

Retail case

Retail case creation enables streamlined support by displaying key retail content for retail organization support use cases.

Cases are the central object within Customer Service Management that is used to coordinate services.

The retail case type introduced within Retail Core builds on existing Customer Service Management case functionality to provide users with retail-specific fields.



For information on using retail cases to create and fulfill support requests for your retail organization, see [Creating support requests for your retail organization](#) and [Resolving support requests for your retail organization](#).

For Retail case table attributes, see [Retail Operations data model tables](#).

Configuring Retail Core

Plan and configure your implementation of Retail Core.

Configuration overview

- [Activate Retail Core](#)

Users with the admin role can install the Retail Core application.

- [Assign roles to Retail Core users](#)

Assign specific roles to give retail users visibility into organizations and the hierarchies they manage.

- [Configure related party configurations for retail staff](#)

Configure the responsibilities of your retail staff by linking related party entity responsibilities to responsibility definitions.

- [Create a retail organization](#)

Create a retail organization to enable management of hierarchical stores and franchises that simplifies store associate management.

- [Add members to a retail organization](#)

Add members to your organization to enable them to view and complete tasks within your retail organization.

- [Configure your organizational structure](#)

Configure the structure of your retail organization within Retail Core.

- [Set up your retail support team](#)

Set up your retail support team by creating a group then assigning the `sn_retail.support_agent` role to members of that group.

- [Configure Playbooks for Retail Core](#)

Retail Core

- [Configure Omnichannel communications for Retail Core](#)

Retail Core users can meet customers where they feel most comfortable by providing omnichannel support.

- [Configure Case Management for Retail Core](#)

Retail Core users can create retail cases as needed while utilizing case management from Customer Service Management.

- [Configure Business Location Service Portal for Retail Core](#)

Retail Core users can utilize the Business Location Service Portal to create and close retail case support requests.

- [Configure Work Orders for Retail Core](#)

Retail Core users can create work orders from their retail cases using the CSM/FSM Configurable Workspace.

Activate Retail Core

You can install the Retail Core application if you have the admin role. The application includes demo data for Retail Operations and installs related ServiceNow[®] Store applications and plugins if they aren't already installed.

Before you begin

Confirm that the application and all of its associated ServiceNow[®] Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).

Role required: admin

About this task

The following items are installed with Retail Core:

- Roles
- Tables
- Plugins
- ServiceNow[®] Store applications
- Related Party Configurations

For more information, see [Components installed with Retail Core](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Retail 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.

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**.

Assign roles to Retail Core users

Assign specific roles to give retail users visibility into organizations and the hierarchies they manage.

Before you begin

Role required: admin

About this task

Roles control access to features, capabilities, and data in the Retail Core application.

You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:

User roles can be configured during the initial set up process for retail organizations or at any time thereafter as needed.

For the list of roles included with Retail Core, see the Base roles installed with Retail Operations table in [Components installed with Retail Core](#).

For instructions on assigning roles to individual users, see [Assign a role to a group](#).

Procedure

1. Navigate to **All > User Administration > Users** then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Configure related party configurations for retail staff

Configure the responsibilities of your retail staff by linking related party entity responsibilities to responsibility definitions.

Before you begin

Role required: admin


About this task

Area, regional, or store managers can be given any type of responsibility.

Related Party Configurations installed with Retail Operations Core

Name	Default responsibility
Area Manager	Location Manager Contributor
Regional Manager	Location Manager Contributor
Store Associate	Location Contributor
Store Manager	Location Manager Fulfiller

You can add, remove, or change the responsibilities associated with your users. It is recommended, however that you create a new related party configuration instead of modifying existing configurations.

For more information, see the Service Organizations responsibilities table in [Add related party configurations to cases, sold products, install bases, or service organizations](#) .

Procedure

1. Navigate to **All > Customer Service > Administration > Related Party Configuration**.
2. To create a related party configuration, select **New**.
3. On the form, fill in the fields.
4. Select **Submit**.

Create a retail organization

Create a retail organization to enable management of hierarchical stores and franchises that simplifies store associate management.

Before you begin

Role required: admin

About this task

Procedure

1. Navigate to **All > Retail Service Management > Retail Organization**.
2. Select **All Organizations**.
3. Select **New**.
4. Fill in the following fields.

Field	Description
Identification number	Alphanumeric code used for identifying this retail organization. This field is optional.
Name	The name of this retail organization.
Ownership	The ownership type of this retail organization. Options are:

Field	Description
	<ul style="list-style-type: none"> ○ Company owned ○ Franchise
Parent Service Organization	<p>The parent retail organization linked to this retail organization.</p> <p>Defines the hierarchy of the retail organizations that you create.</p>
Type	<p>The type of retail organization. Options are:</p> <ul style="list-style-type: none"> ○ Business Location ○ Business Group <p>If you want to create a region or area, select Business Group. If you want to create a store, select Business Location.</p>
Retail Subtype	<p>The retail subtype. Options are:</p> <ul style="list-style-type: none"> ○ Store ○ Region ○ Division ○ Area ○ District
Manager	<p>The manager associated with this retail organization.</p> <p>The user associated with this value is automatically assigned the Location Manager Contributor responsibility for this location.</p>
Flagship	<p>Indicates whether this retail organization is considered a flagship retail organization location.</p>
Street	<p>The street address at which this organization is located.</p>
City	<p>The city in which this organization is located.</p>
Country	<p>The country in which the organization is located.</p>
Zip/Postal Code	<p>The zip/postal code associated with this organization's location.</p>
Phone	<p>The phone number associated with this retail organization.</p>
Email	<p>The email address associated with this retail organization.</p>

Field	Description
Website	The website associated with this retail organization.

5. Click **Submit**.

Add members to a retail organization

Add members to your organization to enable them to view and complete tasks within your retail organization.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Retail Service Management > Retail Organization**.
2. Choose the retail organization.
3. Select **Add Members** under Related Links.
4. Fill in the following fields.

Field	Description
Retail Organization	The associated retail organization that the member should be added to.
Add Member	Denotes if this user is a new member or an existing member. If this user is an existing member, you can use the Members panel to select the person from the Available panel. Then, use the right arrow to move them into the Selected panel.
First Name	Member's first name.
Last Name	Member's last name or family name.
User ID	The associated user ID of this member.
Email	The email address associated with this member.
Member	This member's role. Options are: <ul style="list-style-type: none"> ○ Area manager ○ Regional manager ○ Store associate ○ Store manager

5. Click **Submit**.

What to do next

Ensure that this member has the appropriate role. For more information, see [Assign roles to Retail Core users](#).

Configure your organizational structure

Configure the structure of your retail organization within Retail Core.

Before you begin

Role required: admin

About this task

In the retail organizational structure, physical stores, regions, and countries are organized in a hierarchy. Retailers commonly organize their structures based on these hierarchical levels.

Depending on the size of the retailer, support teams can be organized at various levels within the hierarchy. Support teams can be distributed across regions and areas to provide the following types of support:

- Regional support
- Market support
- Central support helps across the entire retailer

Procedure

1. Navigate to **All > Retail Service Management > Retail Organization**.
2. Select the Retail organization that you want to configure the structure of.
3. Edit the **Parent Service Organization** field as needed.
4. In **Related Links**, you can set up your organizational hierarchy via adding a child organization to the current retail organization by selecting **New** in the Company Owned or Franchise tabs. This sets the current retail organization as the parent organization.
5. Click **Update**.

Set up your retail support team

Set up your retail support team by creating a group then assigning the `sn_retail.support_agent` role to members of that group.

Before you begin

Role required: admin

You can assign a role to a group to grant access to applications and modules to group members.

Before assigning the `sn_retail.support_agent` role to a group of users, you must [Create a user group](#) and then [Add users to a group](#).

When you assign roles to groups rather than to individual users, members of the group inherit the role.

When a user switches groups, the new group role is assigned automatically. For information about the Service Mapping roles, see [Control user access to application services](#).

Procedure

1. Navigate to **All > User Administration > Groups**.
2. Select the group to which you want to assign a role.
3. In the **Roles** related list, select **Edit**.

4. Add the `sn_retail.support_agent` role to the group.

5. Select **Save**.

Configure Playbooks for Retail Core

Retail Core users can use playbooks to complete the tasks and activities that are needed to resolve specific types of cases.

A playbook includes multiple stages and each stage includes one or more activities for an agent to complete. When using a playbook, agents can:

- View the playbook stages and activities.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities necessary to resolve the case.

Playbooks for use with Retail Core are configured just as they are for Customer Service Management.

For information on configuring your Playbooks experience, see [Configure Playbooks for Customer Service Management](#).

Configure Omnichannel communications for Retail Core

Retail Core users can meet customers where they feel most comfortable by providing omnichannel support.

Customers can use chat on the Business Location Service Portal, chat via consumer messaging apps, use email, or place a phone call.

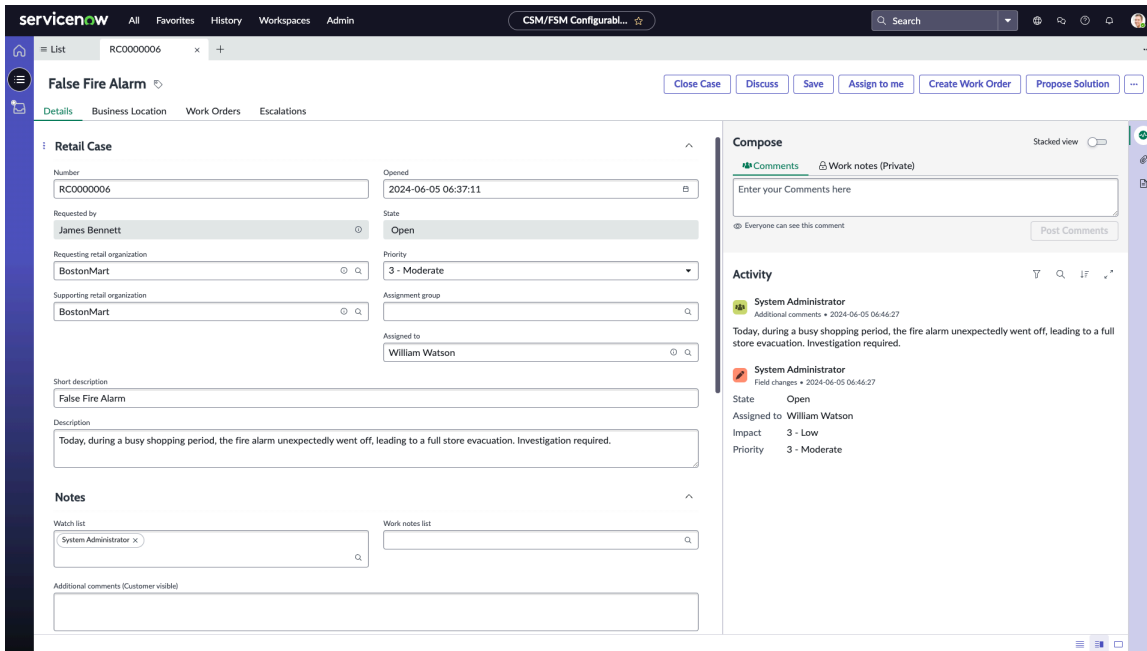
Omnichannel support for Retail Core is configured just as it is for Customer Service Management.

For information on configuring omnichannel communications channels, see [Enable communication channels](#).

Configure Case Management for Retail Core

Retail Core users can create retail cases as needed while utilizing case management from Customer Service Management.

Retail Core leverages existing Customer Service Management case management functionality to extend these case types to fit their needs and workflows.

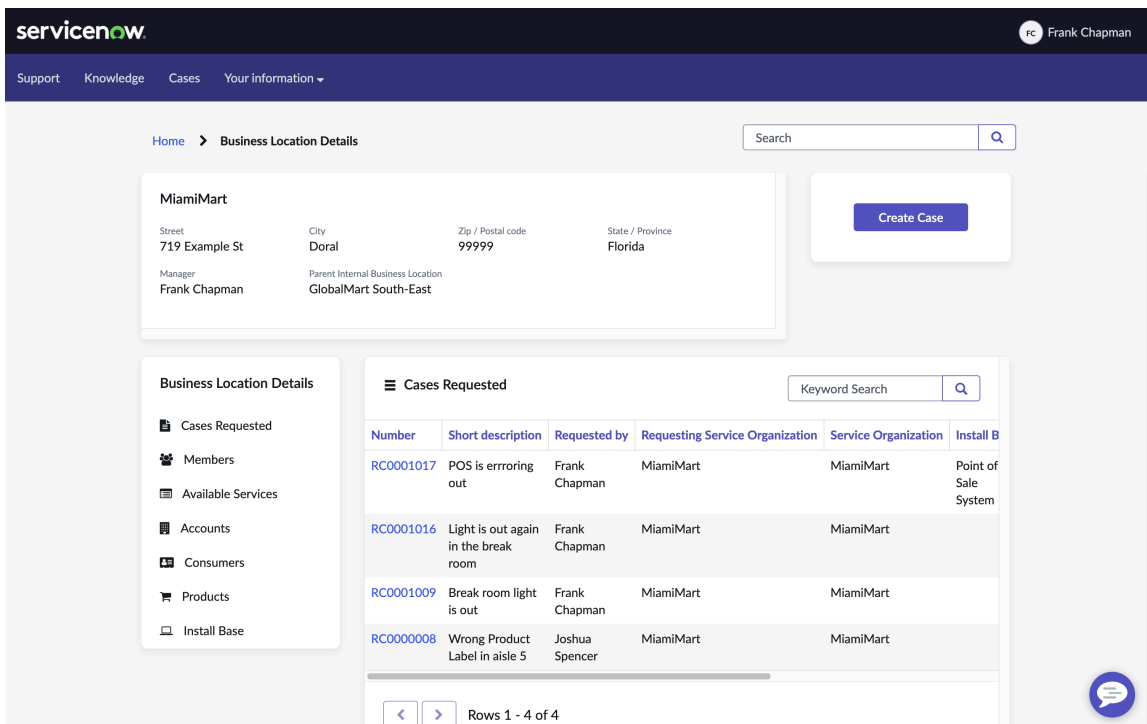


For information on how you can further configure case management, see [Configure case management](#).

Configure Business Location Service Portal for Retail Core

Retail Core users can utilize the Business Location Service Portal to create and close retail case support requests.

Retail Core enables users to leverage the Business Location Service Portal (BLSP) available with the Customer Service Management application to manage their retail case support requests.



For more information on the Business Location Service Portal, see [Using the Business Location Service Portal](#).


Configure Work Orders for Retail Core

Retail Core users can create work orders from their retail cases using the CSM/FSM Configurable Workspace.

Users with the appropriate roles initiate work orders and supply the required details for the tasks involved. Other users then assess these work orders and set up the tasks needed to complete them.

In Retail Core, both work orders and work order tasks must be created and completed within the same retail organization.

Work orders used in Retail Core are configured just as they are for Field Service Management.

For information on configuring work orders, see [Configuring work orders](#) .

Creating support requests for your retail organization

Retail Core user can create support requests using the retail case type.

Retail Core users can create retail case support requests via the following methods:

- Business Location Service Portal
- ServiceNow® Platform
- CSM/FSM Configurable Workspace

Note:

Users can only create cases for retail organizations of which they're a member.

- [Creating a retail case](#)

Create a retail case to request support for issues in your retail organization.

- [Reporting an issue using the Business Location Service Portal](#)

Use the Report an Issue catalog item in the Business Location Service Portal to submit a retail case support request for issues that can be resolved within your retail organization.

- [Creating a retail case support request in CSM/FSM Configurable Workspace](#)

Use the CSM/FSM Configurable Workspace to create a retail case.

Creating a retail case

Create a retail case to request support for issues in your retail organization.

Before you begin

Role required: sn_retail.associate, sn_retail.support_agent, or sn_retail.manager

Procedure

1. Navigate to **All > Retail Service Management > Retail Cases > Create New**.
2. Fill in the following fields.
3. Click **Submit**.

Reporting an issue using the Business Location Service Portal

Use the Report an Issue catalog item in the Business Location Service Portal to submit a retail case support request for issues that can be resolved within your retail organization.

Before you begin

Role required: sn_retail.associate, sn_retail.support_agent, or sn_retail.manager

Procedure

1. Navigate to the **Business Location Service Portal**.
2. Select the **Report an issue** catalog item.
3. Fill in the following fields.
4. Click **Submit**.

Creating a retail case support request in CSM/FSM Configurable Workspace

Use the CSM/FSM Configurable Workspace to create a retail case.

Before you begin

Role required: sn_retail.associate, sn_retail.support_agent, or sn_retail.manager.

Procedure

1. In the CSM/FSM Configurable Workspace, navigate to **Lists > Retail Cases > My Cases**.
2. Click **New**.
3. Fill in the fields as needed.
4. Click **Save**.

Resolving support requests for your retail organization

Use Retail Core to fulfill retail case support requests created for your retail organization.

Retail Core user can resolve retail case support requests via the following methods:

- Business Location Service Portal
- ServiceNow® Platform
- CSM/FSM Configurable Workspace

i Note:

Only users with the fulfiller role can close out retail cases. For information on assigning this role to users, see [Assign roles to Retail Core users](#).

• [Closing a retail case](#)

You can close a retail case once it has been resolved within your retail organization.

• [Viewing and closing a retail case in the Business Location Service Portal](#)

You can track and manage pending retail cases from directly within the Business Location Service Portal.

- [Resolve a retail case in CSM/FSM Configurable Workspace](#)

You can manage and close retail cases using CSM/FSM Configurable Workspace.

Closing a retail case

Once a retail case has been resolved within your retail organization, close the case.

Before you begin

Role required: n_retail.support_agent or sn_retail.manager

Procedure

1. Navigate to **All > Retail Service Management > Retail Cases > All**.
2. Select the case that you want to close.
3. Fill in **Resolution Information** as needed.
4. Click **Close Case**.

Viewing and closing a retail case in the Business Location Service Portal

You can track and manage pending retail cases from directly within the Business Location Service Portal.

My Lists

In **My Lists**, users with the sn_retail.associate role can select cases for their assigned organizations in the **My Cases** tab.

Users with the sn_retail.manager role can see all cases for their assigned organizations and within their hierarchy.

Business Locations Details page

In the Business Locations Details page, all members can see cases for the retail organizations they select.

Closing a retail case

Users with the sn_retail.manager or sn_retail.associate role can close retail cases directly from within the Business Location Service Portal.

After accessing a case from the Cases tab of My Lists or Business Location Details, these users can add comments and attachments to a case then select **Close Case** from the Actions drop down to close the case.

Resolve a retail case in CSM/FSM Configurable Workspace

Manage and close retail cases using CSM/FSM Configurable Workspace.

Before you begin

Role required: sn_retail.support_agent or sn_retail.manager

Procedure

1. In CSM/FSM Configurable Workspace, navigate to **Lists > Retail Cases > My Cases**.
2. Select the case that you want to close.
3. Fill in **Resolution Information** as needed.
4. Click **Close Case**.

Retail Operations Core reference

Reference topics provide additional information about Retail Core components.

Components installed with Retail Core

Several types of components such as tables, user roles, and business rule are installed when you activate the Retail Core plugin.

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](#).

Tables installed with Retail Core

Table name	Description
Retail Organization [sn_retail_organization]	Stores information about your retail organizations, including locations and organizational hierarchies.
Retail Case [sn_retail_case]	Stores information about your retail case types and provides the basis for retail case creation. Note: This table is an extension of the Case [sn_customerservice_case] table.

Base roles installed with Retail Core

For information on configuring these roles for retail, see [Assign roles to Retail Core users](#).

Role	Description	Contains roles
sn_retail.associate	Create, review, comment on, update, and resolve retail cases where the agent acts as a contributor or fulfiller at their location.	<ul style="list-style-type: none"> • sn_customerservice.svc_location_agent • sn_customerservice.service_organization_co • sn_retail.fulfiller • sn_retail.contributor • sn_retail.org_viewer

Role	Description	Contains roles
sn_retail.support_agent	Creates, updates, resolves, and tracks retail cases across service organizations at the system level.	<ul style="list-style-type: none"> • sn_customerservice_agent • sn_retail.fulfiller • sn_retail.contributor • sn_retail.org_viewer
sn_retail.manager	Manages members and responsibilities, and oversees all retail cases for the location and its hierarchy, acting as either a contributor manager and a fulfilling manager.	<ul style="list-style-type: none"> • sn_customerservice.svc_location_manager • sn_customerservice.svc_location_manager_c • sn_retail.fulfiller • sn_retail.contributor • sn_retail.org_viewer • sn_retail.report_viewer

Related Party Configurations installed with Retail Core

Name	Default responsibility
Area Manager	Location Manager Contributor
Regional Manager	Location Manager Contributor
Store Associate	Location Contributor
Store Manager	Location Manager Fulfiller

Plugins installed with Retail Core

Name	Description
Business Location [com.snc.business_location]	<p>This plugin supports the Service Model Foundation, where the corporation does business with customers through physical channels such as stores and branches.</p> <p>For more information, see Configure Service Model Foundation.</p>
Customer Service [com.sn_customerservice]	<p>The Customer Service Management application enables you to provide service and support for your external customers using several communication channels, such as email, web, and telephone. A case is created to track the issue reported or service requested and assigned to groups or agents. Customer service agents in your organization work on the cases and resolve issues.</p>

Name	Description
	For more information, see Customer Service Management .
Customer Service with Field Service Management [com.snc.csm_fsm_integration]	Enables Account, Contact, Partner, Partner Contact, Consumer information from Customer Service to Field Service Management.

Business rules installed with Retail Core

Business rule	Table	Rule criteria	Description
Add manager member for retail org	sn_customer_service_organization	After update or insert	Assigns the sn_retail.manager role to the user added as a manager in a retail organization.

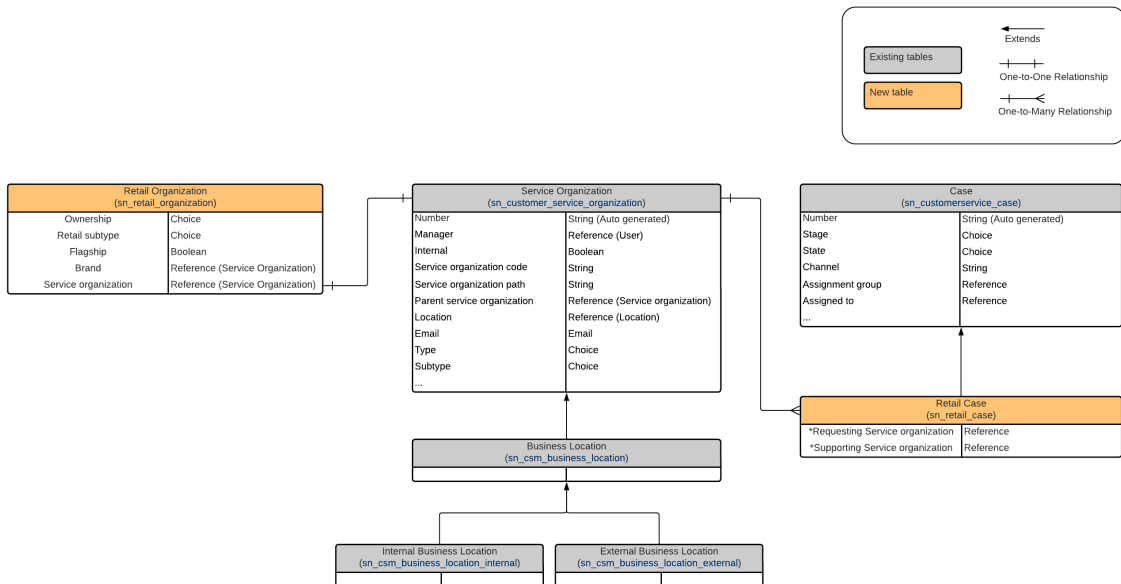
Retail data model

Learn about the Retail Core application by viewing the data model and role relationship diagrams. These diagrams show the relationships between the tables and roles within the application and provide an overall picture of how the Retail Core application operates.

Data model

Retail Core provides you with a flexible data model that you can extend and leverage to fit your needs.

The following diagram shows the tables and their relationships within the Retail Core application.



Retail Operations data model tables

Tables configured within the Retail Operations application enable you to determine the data model, tasks, and product offerings for your Retail Operations workflows.

Retail Organization table

The Retail organization [sn_retail_organization] table stores information about your retail organizations.

This has a one-to-one relationship with the Service Organization [sn_customer_service_organization] table.

Retail-specific attributes should be maintained in this table.

Field	Description
Ownership	The ownership type of this retail organization. Options are: <ul style="list-style-type: none"> • Company owned • Franchise
Brand	The associated brand of this retail organization.
Service Organization	The associated service organization.
Retail Subtype	The retail subtype. Options are: <ul style="list-style-type: none"> • Store • Region • Division • Area • District
Flagship	Indicates whether this is considered a flagship retail organization location.

Retail case table

The Retail case [sn_retail_case] table stores information about your retail case types and provides the basis for retail case creation.

This table extends the Customer Service Management case table. All functionality utilized through the Customer Service Management case remains intact.

This table can be extended to further expand the flow and logic for retail use cases.

Field	Description
Number	Numerical code indicating the case number for this request.
Requested by	Internal user associated with this request.


Field	Description
Requesting Retail Organization	Retail organization this request is being created for.
Supporting Retail Organization	Retail organization responsible for fulfilling this request.
Short description	A short description of this request's purpose.
Description	A detailed description of this request's purpose.
Opened	Date and time at which this request was opened.
Priority	Sequence in which this case must be resolved, based on impact and urgency.
Assignment Group	The associated assignment group responsible for working on this request.
Assigned to	Person primarily responsible for working on this request.

Domain Separation in Retail Core

Domain separation is supported for Retail Core. 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: Basic

- Business logic: Ensure that data goes into the proper domain for the application’s service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer’s message, the customer must be able to see the SP’s response. For more information on support levels, see [Application support for domain separation](#) .

Retail use case

- For retail case, the domain column is inherited from the customer service case.
- For retail organization, the 'domain_master' attribute receives information from Service Organization.