Lab Guide

CSM Overview:

Delivering Superior Customer Service

Rich Runfola & Jeff Hoffman

Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

Lab Sponsored by Microsoft Azure



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Lab Goal

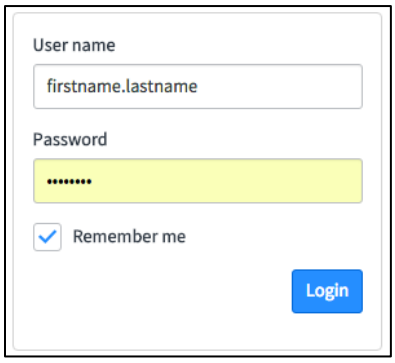
Lab 1.0
The Basics: Roles, Groups and Skills

This lab explains how to set up the Users, Roles, and Skills for your CSM ServiceNow application.

- **Roles** are defined for CSM team members, and define their responsibilities in the Customer Service department
- **Groups** are used to further divide your Customer Service department (e.g., product, region, tier, etc.)
- **Skills** define specialized Customer Service employee knowledge

Log On to Your Training ServiceNow Instance

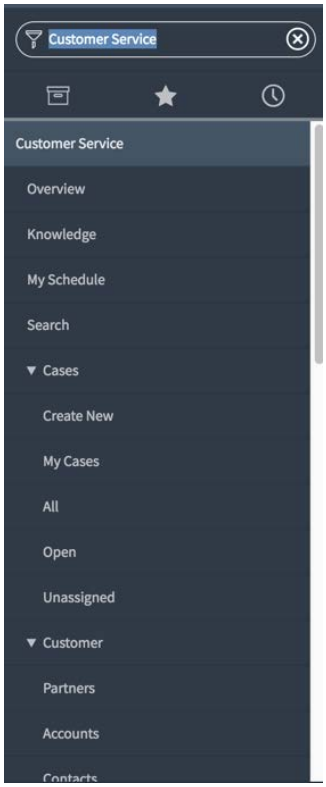
1. Navigate to the unique instance URL provided to you.



2. Log on with the provided credentials.

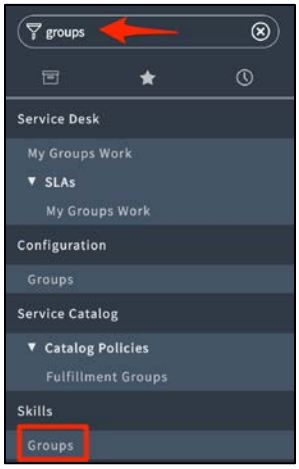
Navigation Tip

When navigating through ServiceNow, use the filter in the left Navigation pane to limit your options. Typing **CSM** into the left navigation pane displays all modules in the Customer Service Management plugin.



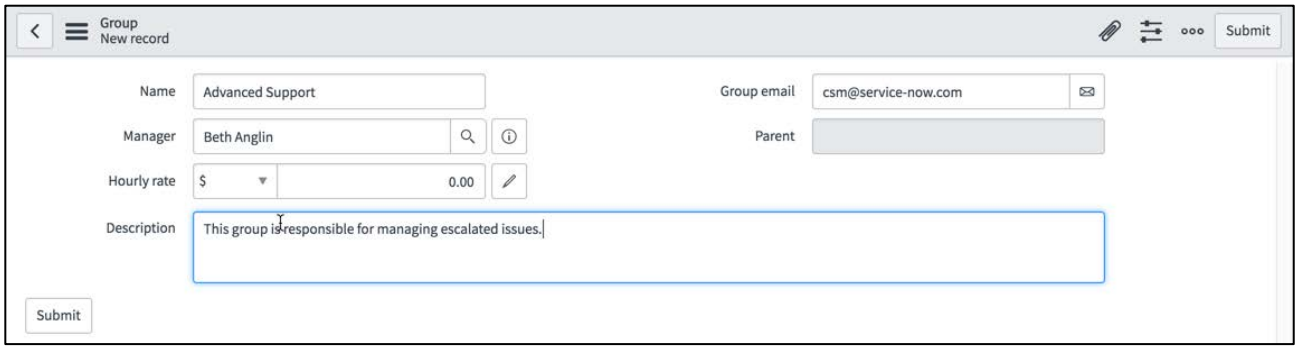
Review and Set Up Groups and Roles

1. Navigate to **Skills** > **Groups**.



2. Create a new group for **Advanced Support**. Click the blue **New** button. When the form opens, enter the following values for each of these fields:

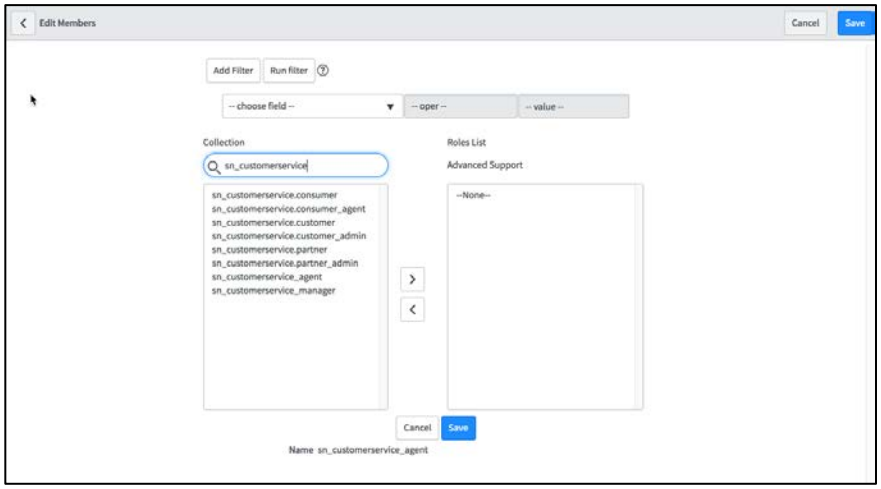
   Name: **Advanced Support**
   Manager: **Beth Anglin**
   Type: **Customer Service**
   Group email: **csm@acme.com**
   Description: **This group is responsible for managing escalated issues.**



3. Right-click on the header and select **Save**.

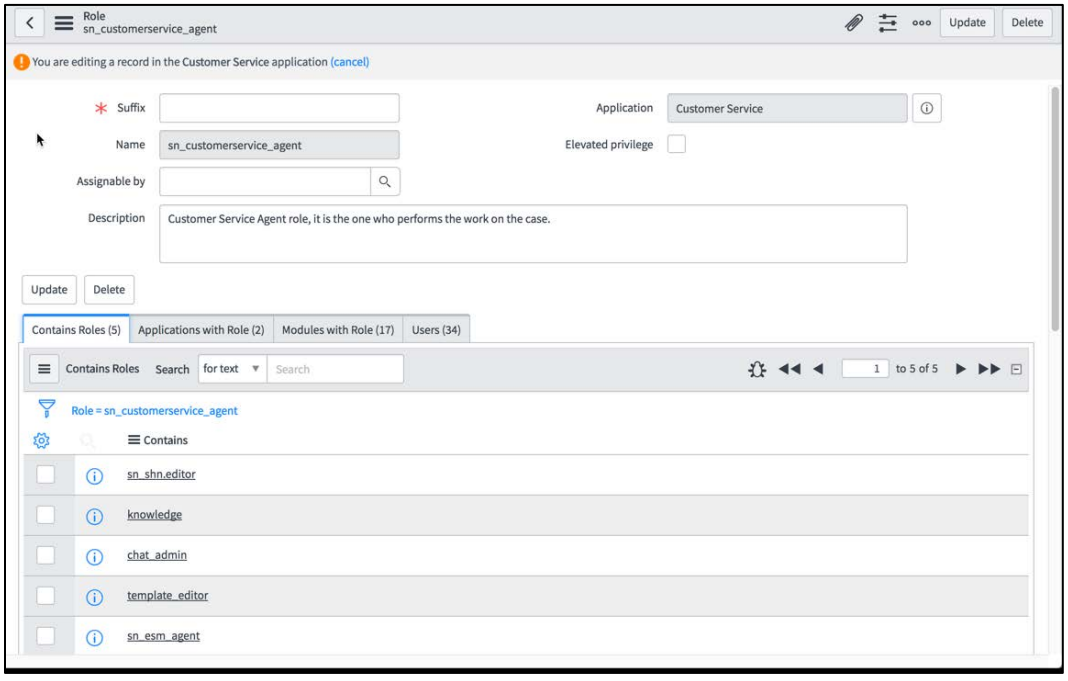
4. Scroll down and click the **Roles** tab. Select **Edit.**

5. In the Collection search box, type **sn_customerservice** to filter the roles specific to CSM.



6. **Select** sn_customerservice_agent, click the **right arrow** to place in the Roles List, and click **Save**.

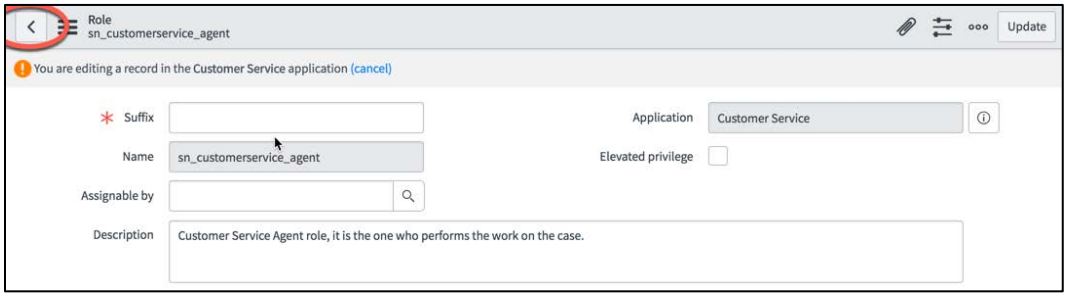
7. Roles are commonly associated with groups. Click the **sn_customerservice_agent** role to see more about it. Roles define the Applications, Modules, and tables that a user can access.



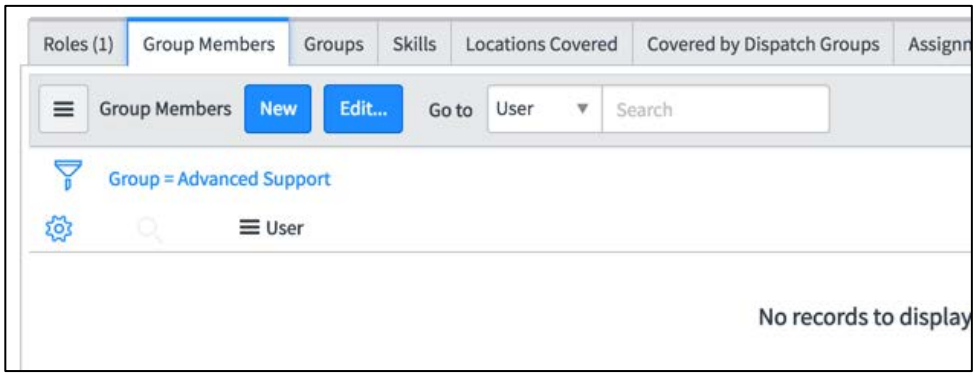
Add Users to the Group

After creating the group and assigning roles, add employees to the group.

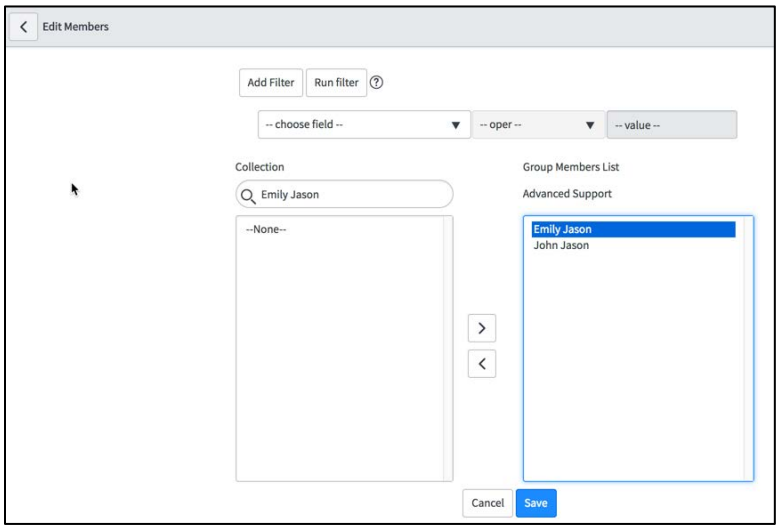
1. Click the **back** arrow to return to the basic groups screen.



2. Click the **Group Members** tab, and select the **Edit** button.



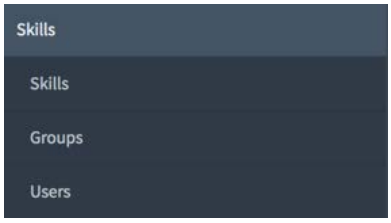
3. Choose **John Jason** and **Emily Jason**. Click **Save**.



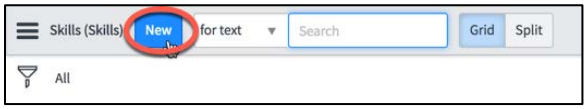
Create a Skill for "Technical Wizard"

Skills define an expertise in a single area and are commonly used to match employees to cases. Agents possess skills and cases require them. This section explains how to add a skill to match the catalog item you are creating.

1. Navigate to the **Skills** module.



2. Click **New** Skill at the top-left part of the page.



3. Define the following values for the skill:
   Skill: **Technical Wizard**



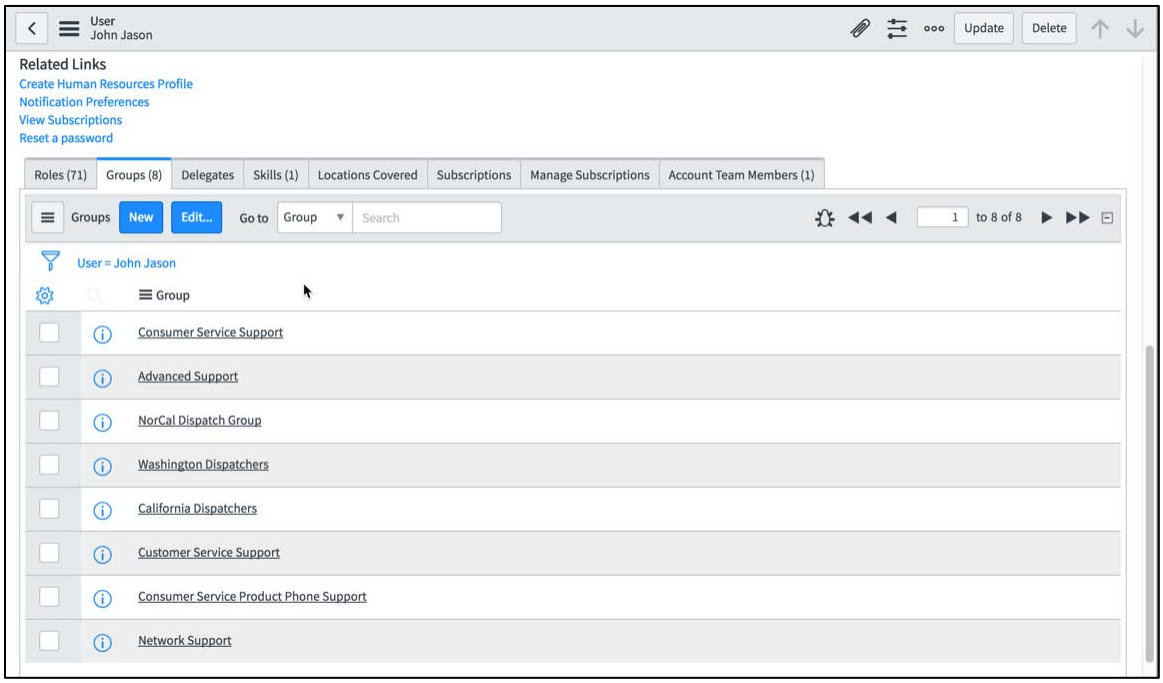
4. Right-click the header and select **Save**.

5. Add an agent to the skill. Click the **Users** tab in the related lists, and then click **Edit Users**.

6. Assign the skill to John Jason: Enter his **first name** into the filter box, then click **Save**.

Lab Success Verification

1. Navigate to **System Security->Users** and search for **John Jason**. The screen should look like the example.



2. Verify the following:

   Technical Wizard skill shows at least one user.
   John Jason's groups include Advanced Support.
   John Jason has the agent Technical Wizard skill.

Lab Goal

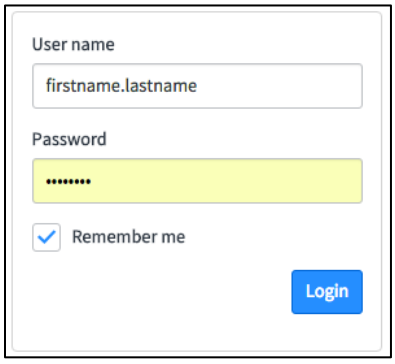
Lab 2.0 Skills-Based Routing

This lab explains how to set up and configure Cases requiring a specific skill or assignment rule to route to the proper Agent. The lab includes the following task:

- Map the assignment group and agent to the newly created skill.

Log On to Your Training ServiceNow Instance

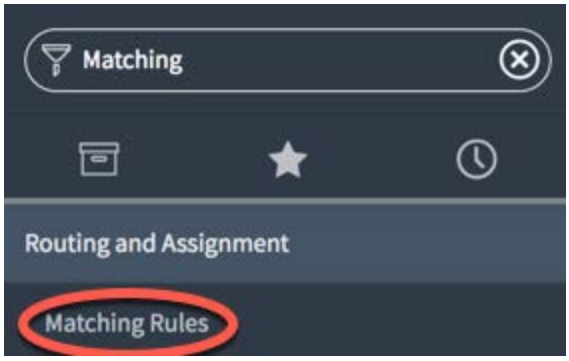
1. Navigate to the unique instance URL provided to you.



2. Log on with the provided credentials.

Create the Matching Rule Used for Agent Assignment

1. Navigate to **Matching Rules**.



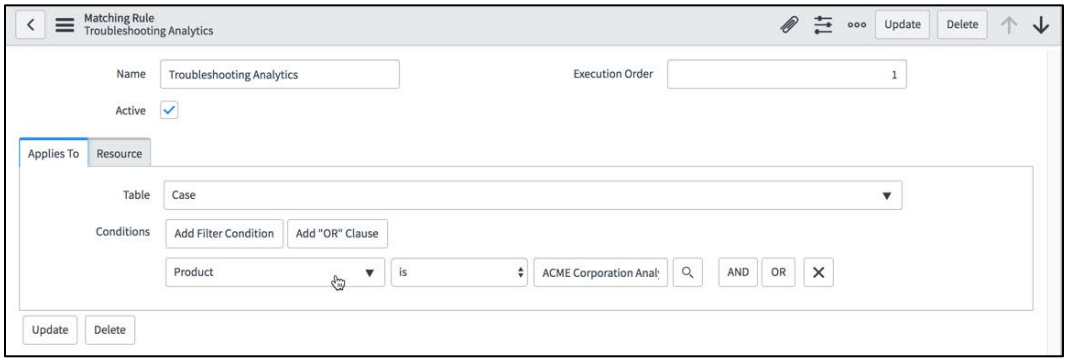
2. Select **New** and create a new Matching Rule with the following information:

   Name: **Troubleshooting Analytics**
   Execution Order: **1**
   Table: **Case**
   Conditions: **Product is ACME Corporation Analytics**

3. Click the Resource tab and enter the following information.

   Matching: **Advanced**
   Skill: is **Technical Wizard**

4. Right-click the header, and choose **Save**

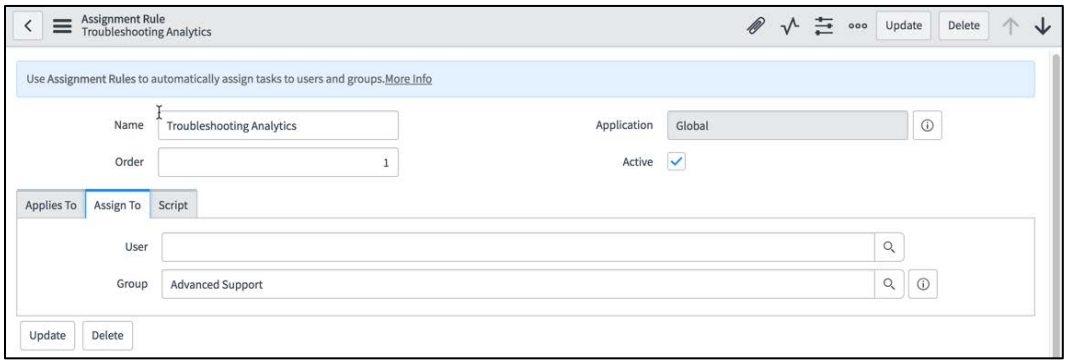


5. Click the **Create Assignment Rule** from the related links.



6. Under the **Assigned To** tab**,** select the Group **Advanced Support**.

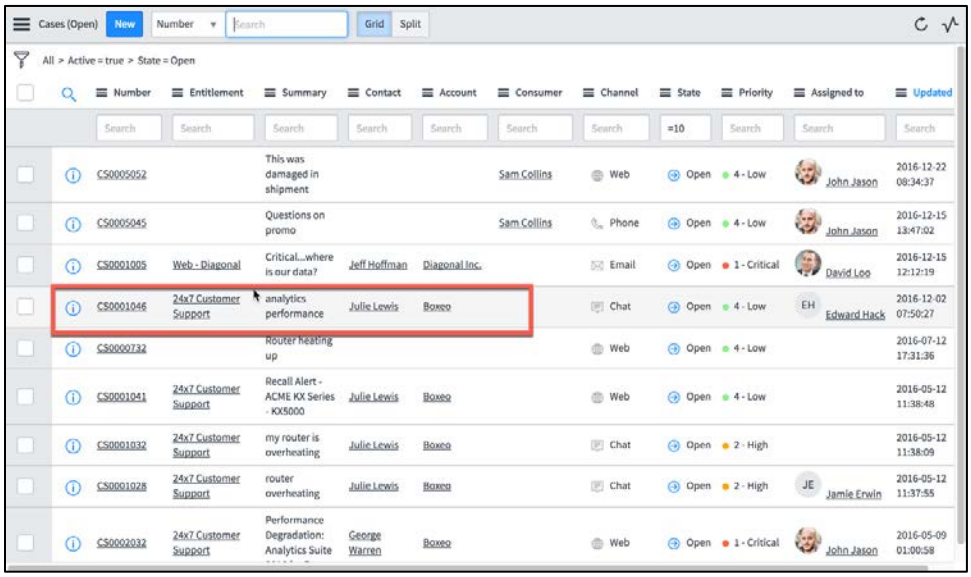
7. Click **Update**.



Lab Success Verification

1. Navigate to **Cases** > **Open**.

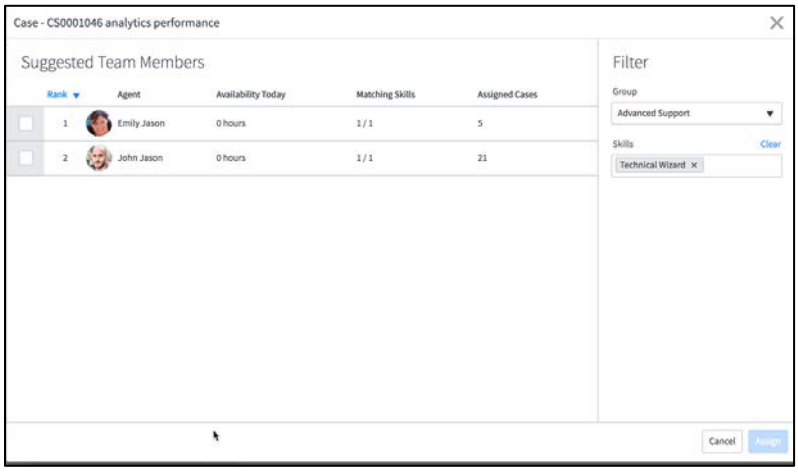
2. Open Case **CS0001046**.



3. Click the **Find Agents** button next to Assigned To. 

4. Apply filters:

   Group: **Advanced Support**
   Skills: **Technical Wizard**



Lab Goal

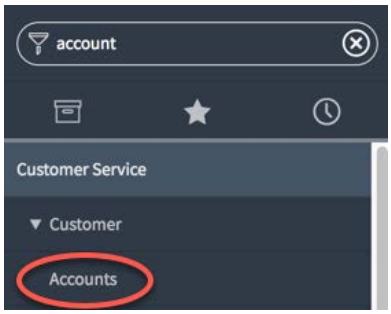
Lab 3.0 Account Setup

This lab explains how to set up and configure an Account. The lab includes the following task:

- Create Contacts, Contract, Entitlement, and Support Team

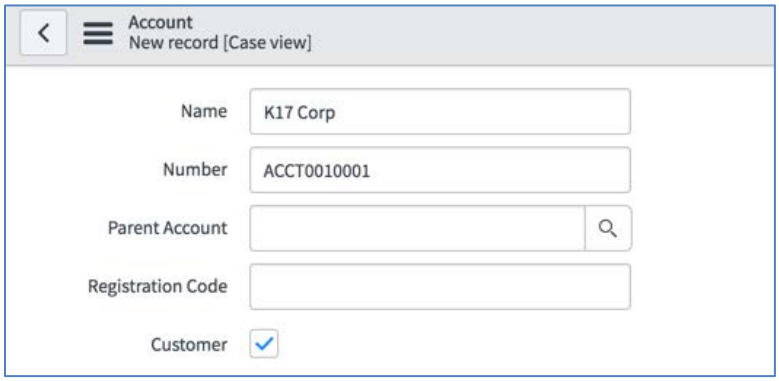
Create a New Account

1. Navigate **Customer Accounts**.



2. Select **New** to create a new Account.

3. Enter Name: **K17 Corp,** right-click the header, and choose **Save**



Create the Primary Contact

1. In the **Contacts** related list, select **New**.

2. Enter the following information:

   First Name: **[firstname]**
   Last Name: **[lastname]**
   Account: **K17 Corp**
   Email: **[firstname*]*@mailinator.com

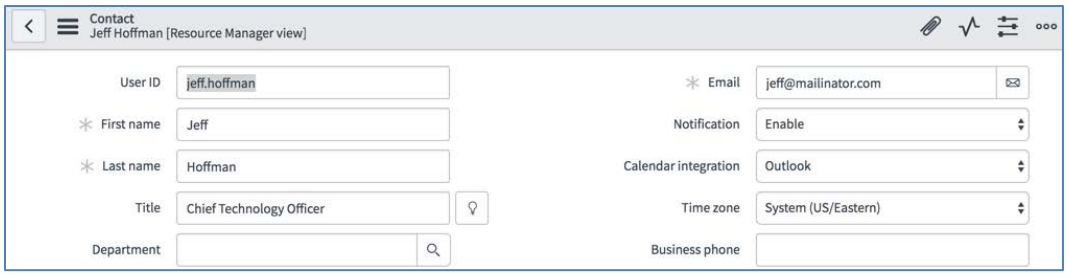


3. Right-click the header and choose **Save**.

4. On the header, click [Case view] and select **Resource Manager**.

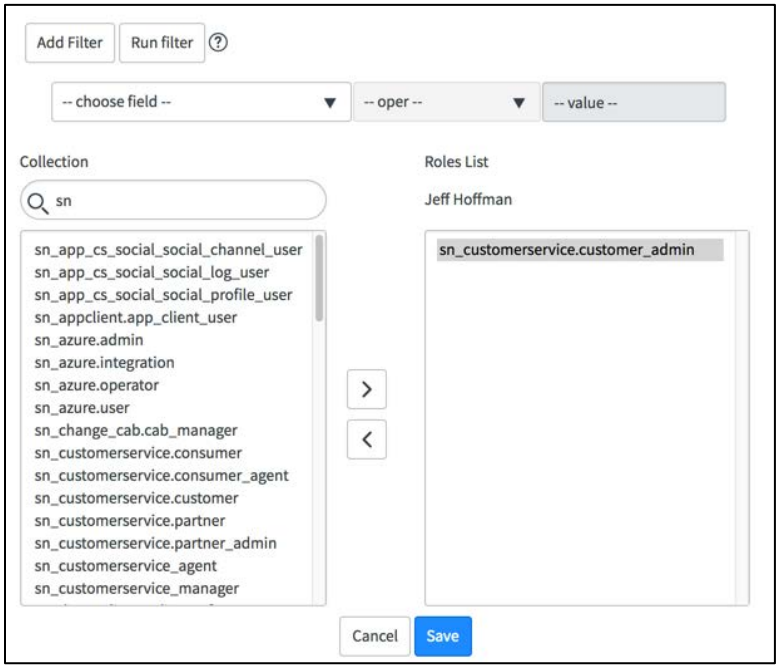


5. Create a **User Name** for the contact.
   User ID**: [firstname].[lastname]**

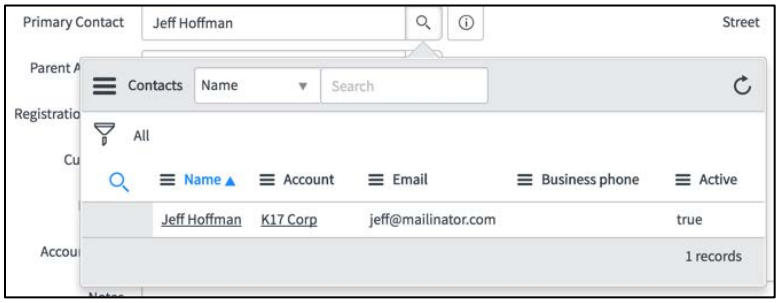


6. Right-click the header and choose **Save**

7. Add the **sn_customerservice.customer_admin** role.
8. Select **Save**.



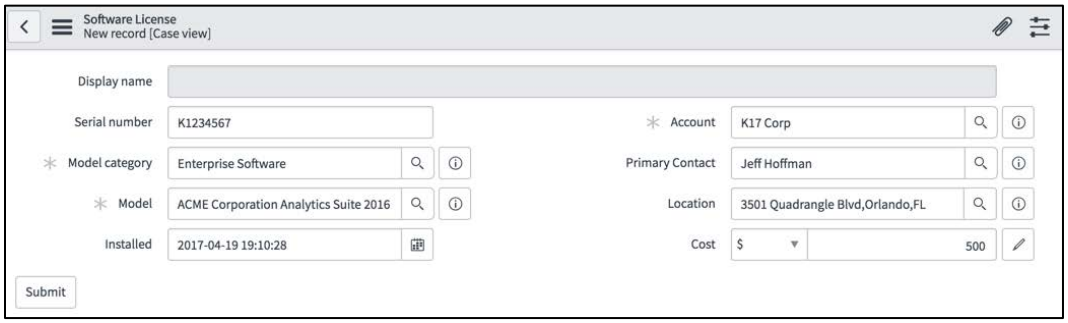
9. Add the **Contact** as the **Primary Contact** for the Account.
10. Right-click the header and chose **Save**.



Create a Software Asset

1. In the **Assets** related list, select the **New** button and enter the following information:

   Type: **Software License**
   Model Category: **Enterprise Software**
   Model: **ACME Corporate Analytics Suite 2016**
   Account: **K17 Corp**

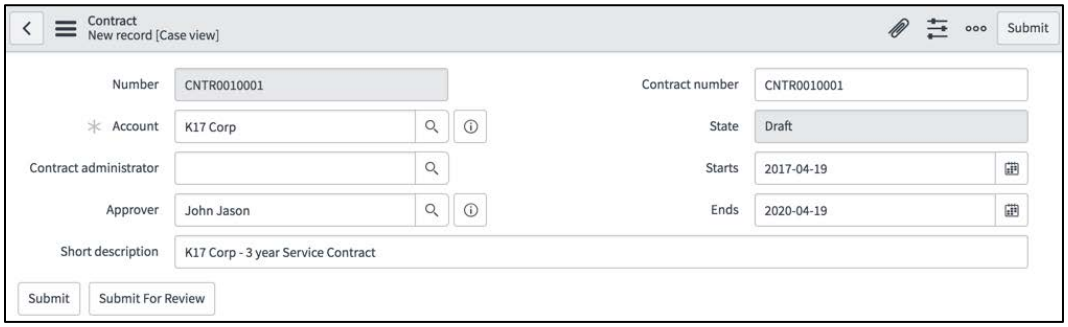


2. Click **Submit**.

Create a Contract

1. In the **Contracts** related list, select the **New** button and enter the following information:

   Account: **K17 Corp**
   Approver: **John Jason**
   Short Description: **K17 Corp – 3 year Service Contract**
   Starts: **Today's date**
   Ends: **Today's date + 3 years**

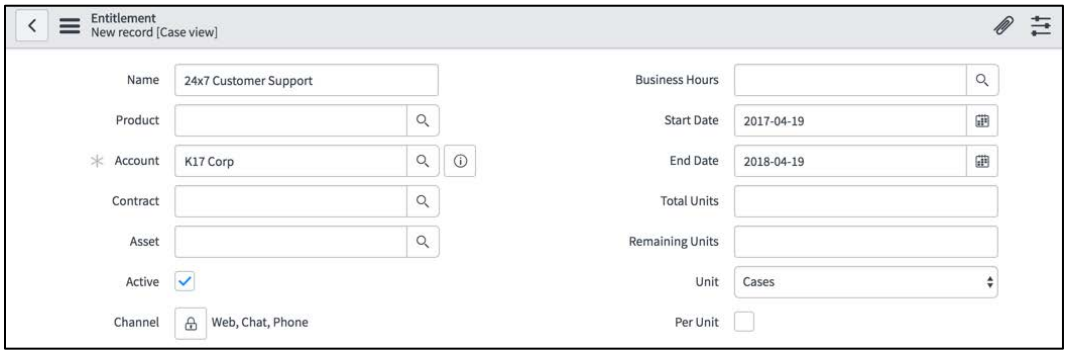


2. Click **Submit.**

Create an Entitlement

1. In the **Entitlements** related list, select the **New** button and enter the following information:

   Name: **24x7 Customer Support**
   Account: **K17 Corp**
   Channel: **Web, Chat, Phone**
   Start Date: **Today's date**
   End Date: **Today's date + 1 year**

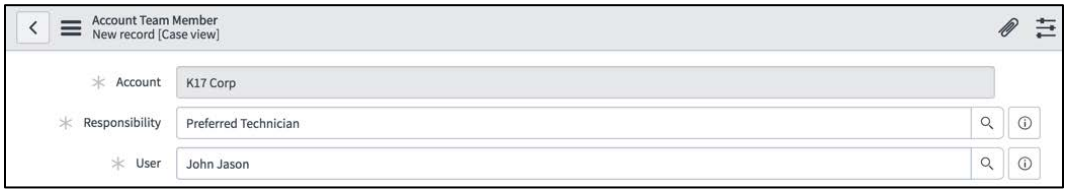


2. Click **Submit**.

Create an Account Team

1. In the **Account Team Members** related list, select the **New** button and enter the following information:

   Responsibility: **Preferred Technician**
   User: **John Jason**



2. Click **Submit**.

Lab Goal

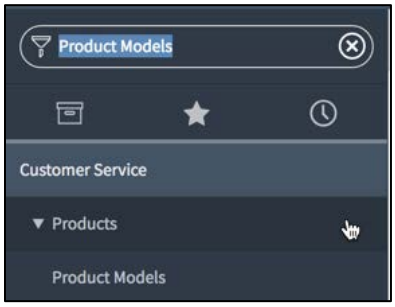
Lab 4.0 Configure Product Registration

This lab explains how to configure the Product Registration process for the Consumer Service Portal. The lab includes the following tasks:

- Add a new Product Model available for registration
- Register a Product to a Consumer

Set Up the Product Model

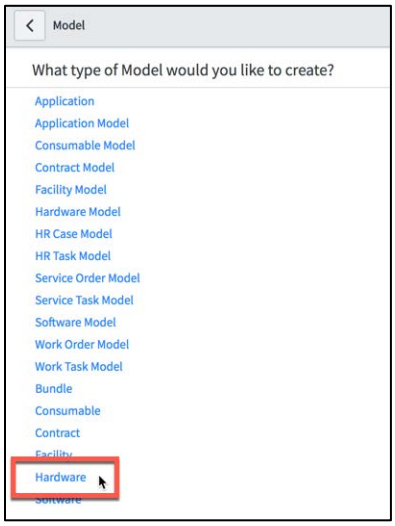
1. Navigate to **Customer Service > Product Model**.



2. Click **New** on the left side of the panel.

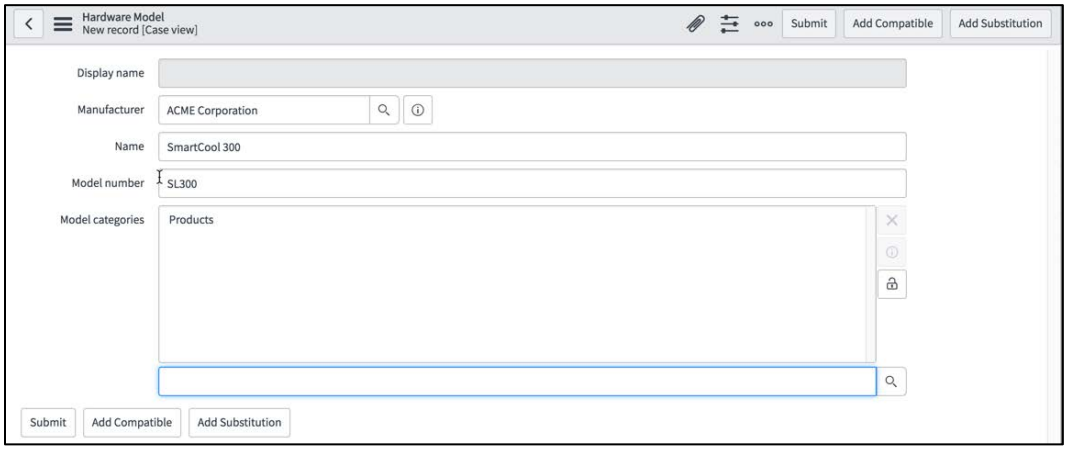


3. Select **Hardware**.



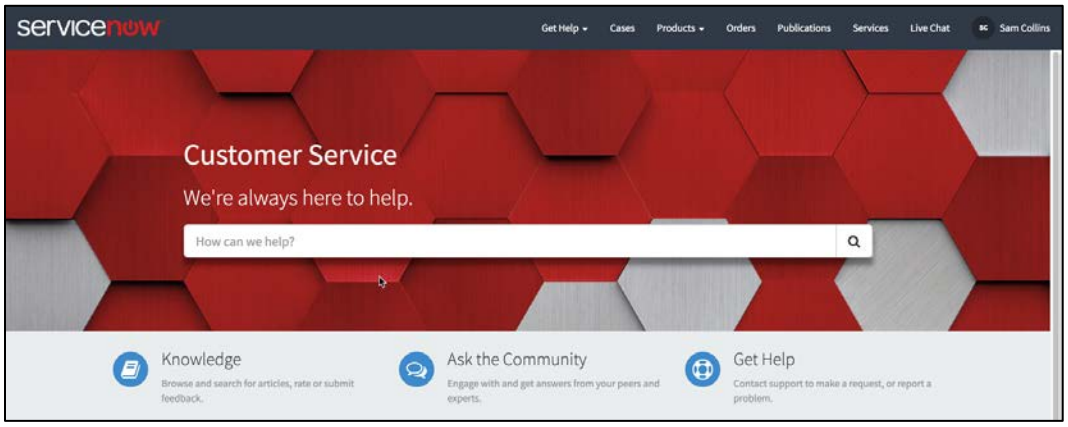
4. Update **Product** to include the **SmartCool 300** details.

   Manufacturer: **ACME Corporation**
   Name: **SmartCool 300**
   Model Number: **SL300**
   Model Categories: **Products**



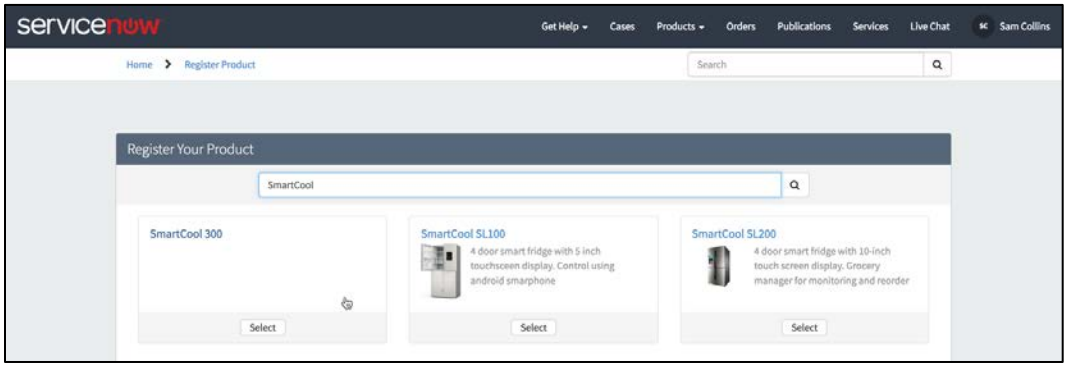
5. Impersonate **Sam Collins**.

6. Navigate to the **/csp** portal.



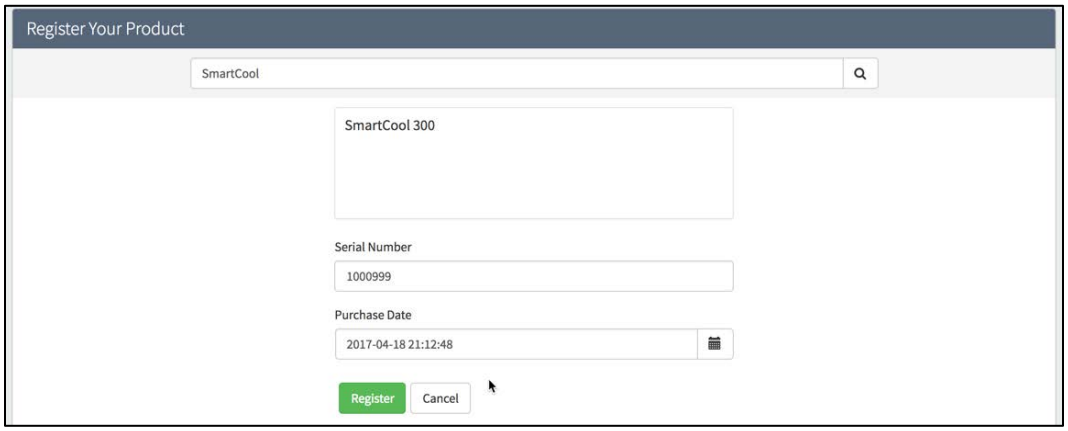
7. Click **Products>Register Product**.

8. Search for **SmartCool**.



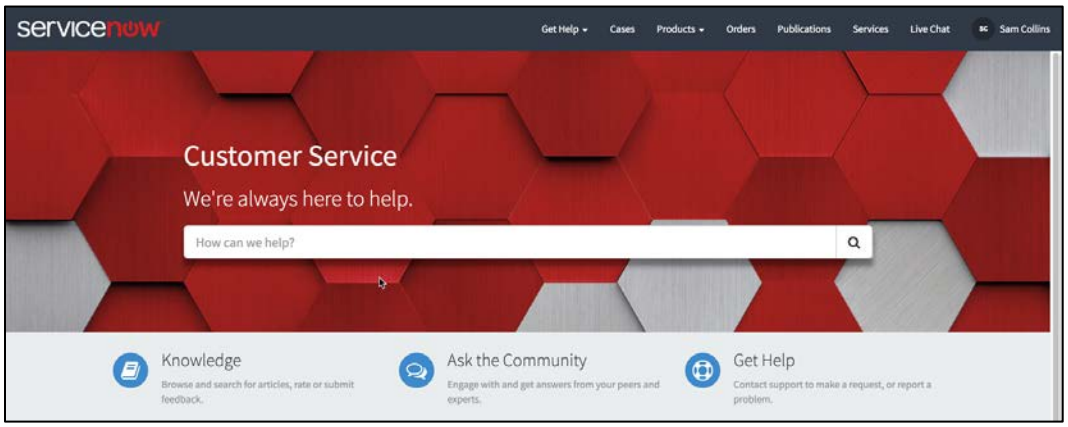
9. Click **Select** under **SmartCool 300**.

10. Click **Register** to complete.



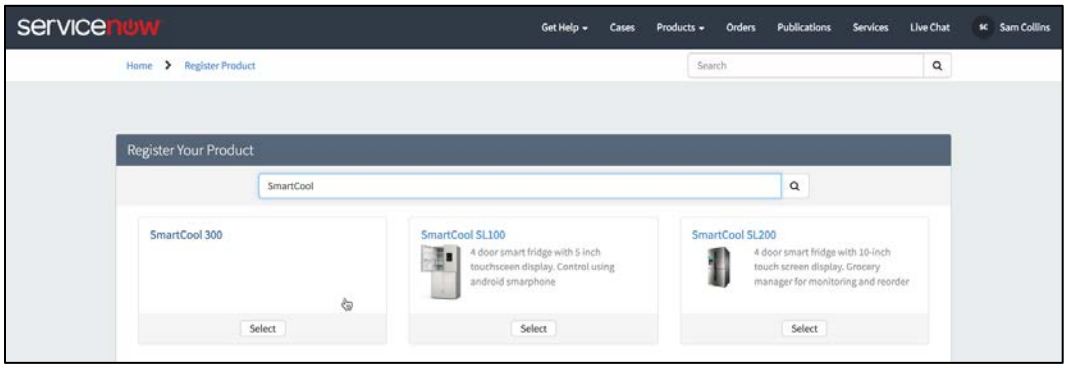
Lab Success Verification

1. Impersonate **Sam Collins**.
2. Navigate to the **/csp** portal



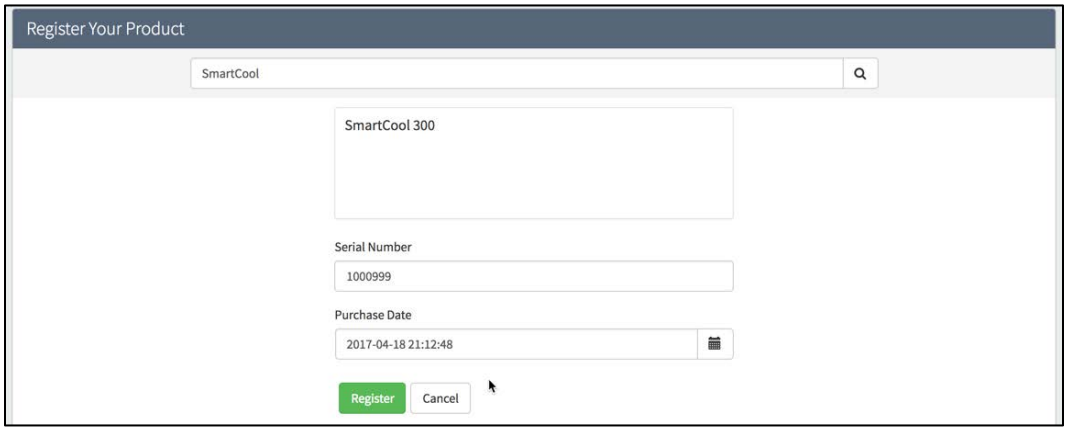
3. Click **Products>Register Product**.

4. Search for **SmartCool**.



5. Click **Select** under **SmartCool 300**.

6. Complete the **Register Your Product** fields.



7. Click **Register** to complete.



Lab Goal

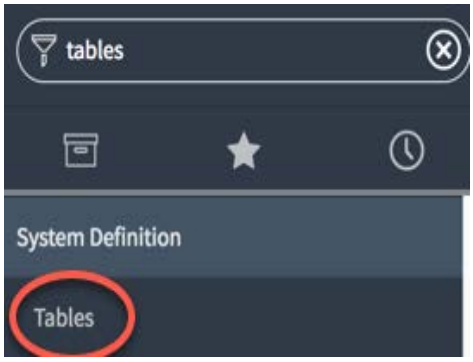
Lab 5.0 Record Producer

This lab explains how to configure the existing **Create Case** Record Producer. The lab includes the following tasks:

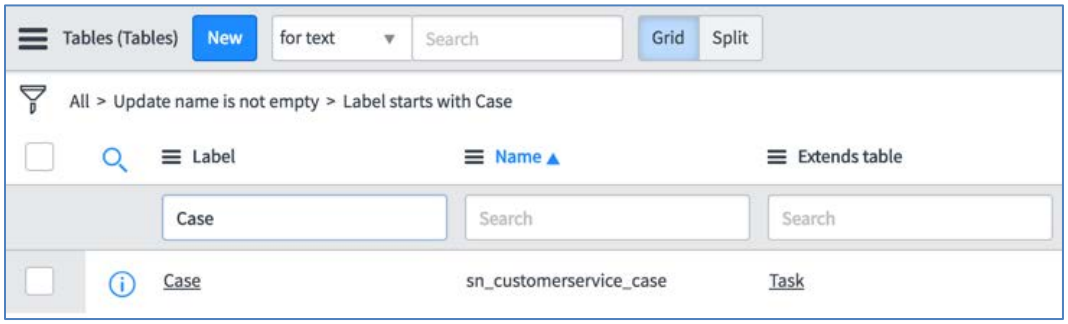
- Add Categories and Subcategories to the Case object
- Modify the Case record producer

Add Category Choices

1. Navigate to **Tables**.



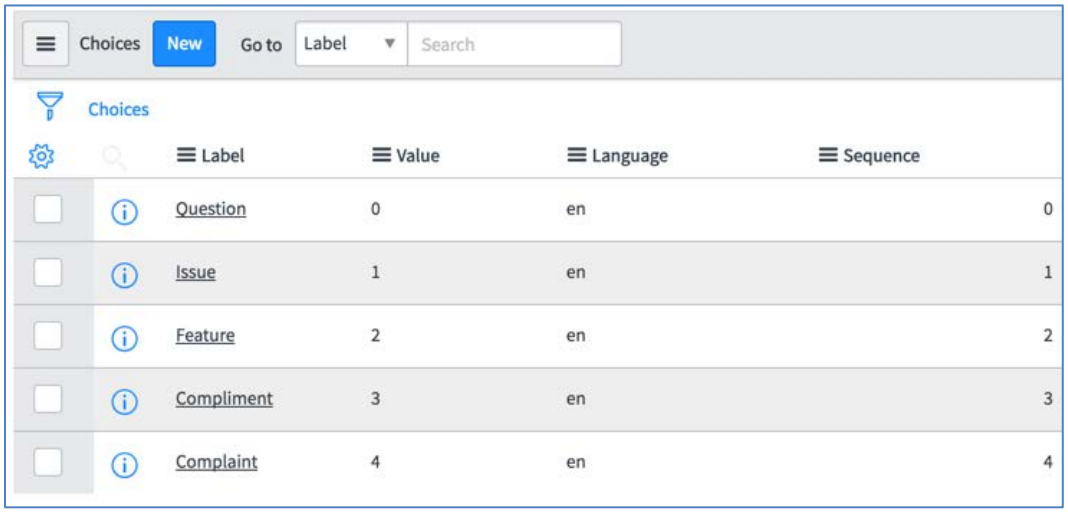
2. In the **Name** column filter, type **Case** and press **Enter**.



3. Select the **Category** from the **Column** tab.

4. Add the **following** to the **Choices** list:

   Label: **Compliment** | Value: **3** | Sequence: **3**
   Label: **Complaint** | Value: **4** | Sequence: **4**

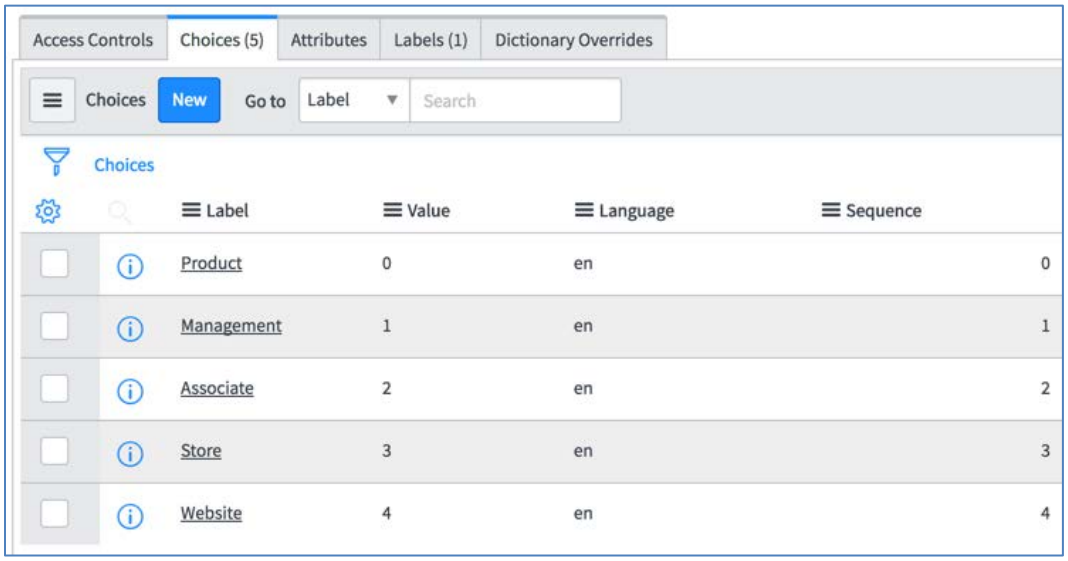


Add Subcategory Choices

1. Navigate to **Tables**.
2. In the **Name** column filter, type **Case** and press **Enter**.
3. Select the **Subcategory** from the **Column** tab.

4. Add the following to the **Choices** list:

   Label: **Product** |Value: **0** | Sequence: **0**
   Label: **Management** | Value: **1** |Sequence: **1**
   Label: **Associate** | Value: **2** |Sequence: **2**
   Label: **Store** | Value: **3** |Sequence: **3**
   Label: **Website** | Value: **4** |Sequence: **4**

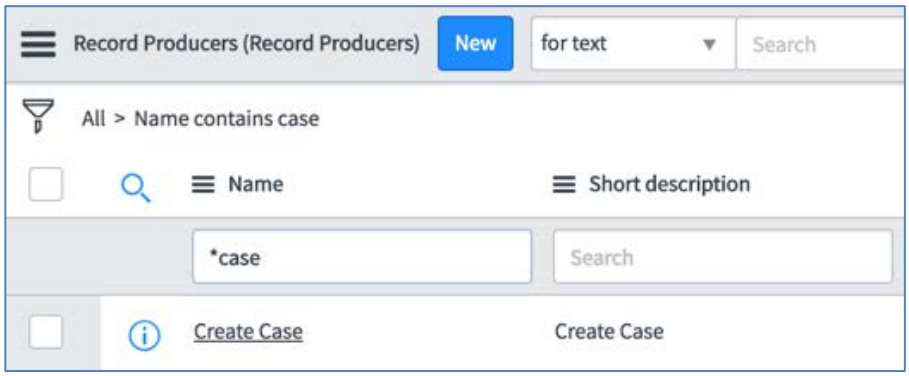


Modify the Create Case Record Producer

1. Navigate to **Record Producers**.

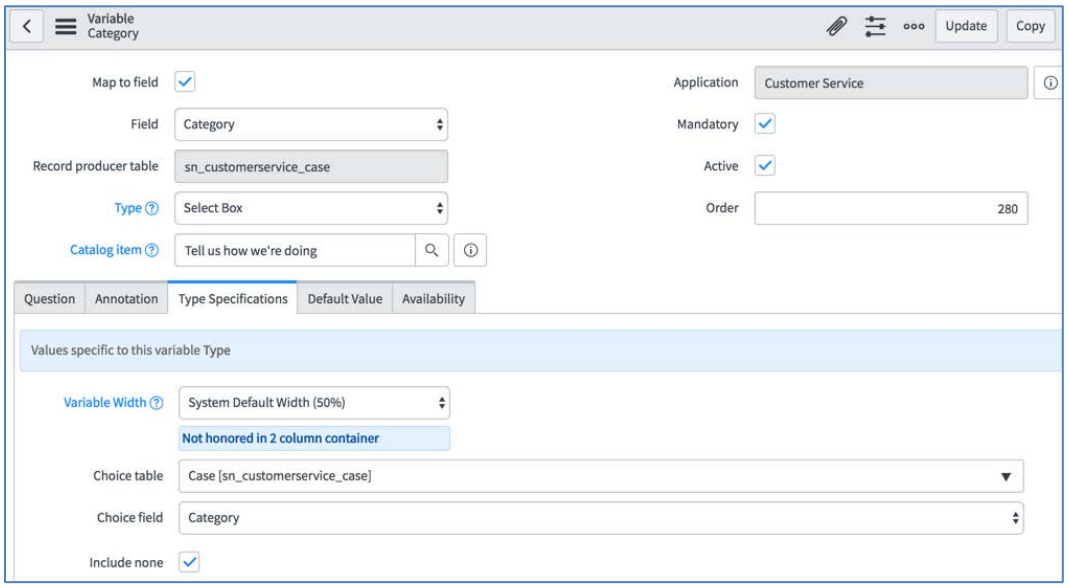


2. In the **Name** column filter, type ***case** and press **Enter**.
   *If two records return, be sure to select the one where table is **sn_customerservice_case**.*

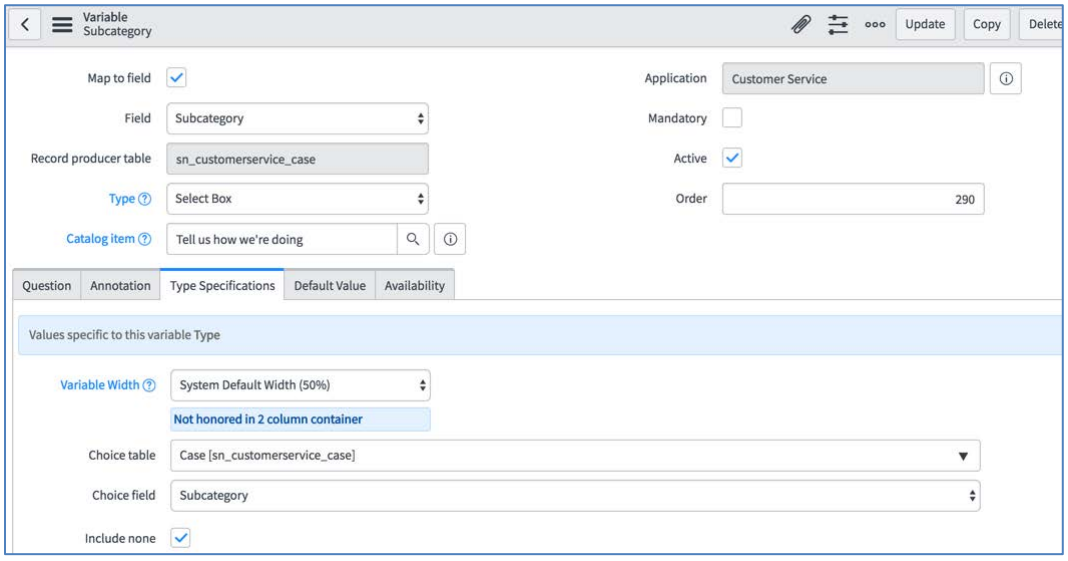


3. Open the **Create Case** record and change the **Name** to **Tell us how we're doing**.
4. Right-click the header and chose **Insert and Stay**.
5. In the Variables related list add the **Category** and **Subcategory** fields.

6. **Category**
   Map to field: **checked**
   Field: **Category**
   Type: **Select Box**
   Order: **280**
   Question: **Category**
   Type Specification -> Choice table: **Case**
   Type Specification -> Choice field: **Category**
   Type Specification -> Include none: **checked**



7. **Subcategory**
   Map to field: **checked**
   Field: **Subcategory**
   Type: **Select Box**
   Order: **290**
   Question: **Subcategory**
   Type Specification -> Choice table: **Case**
   Type Specification -> Choice field: **Subcategory**



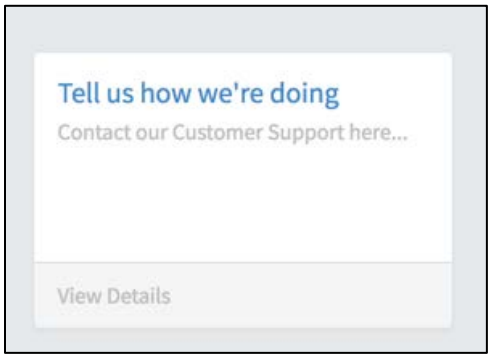
8. Select **Submit** when finished.

Test the Catalog Item

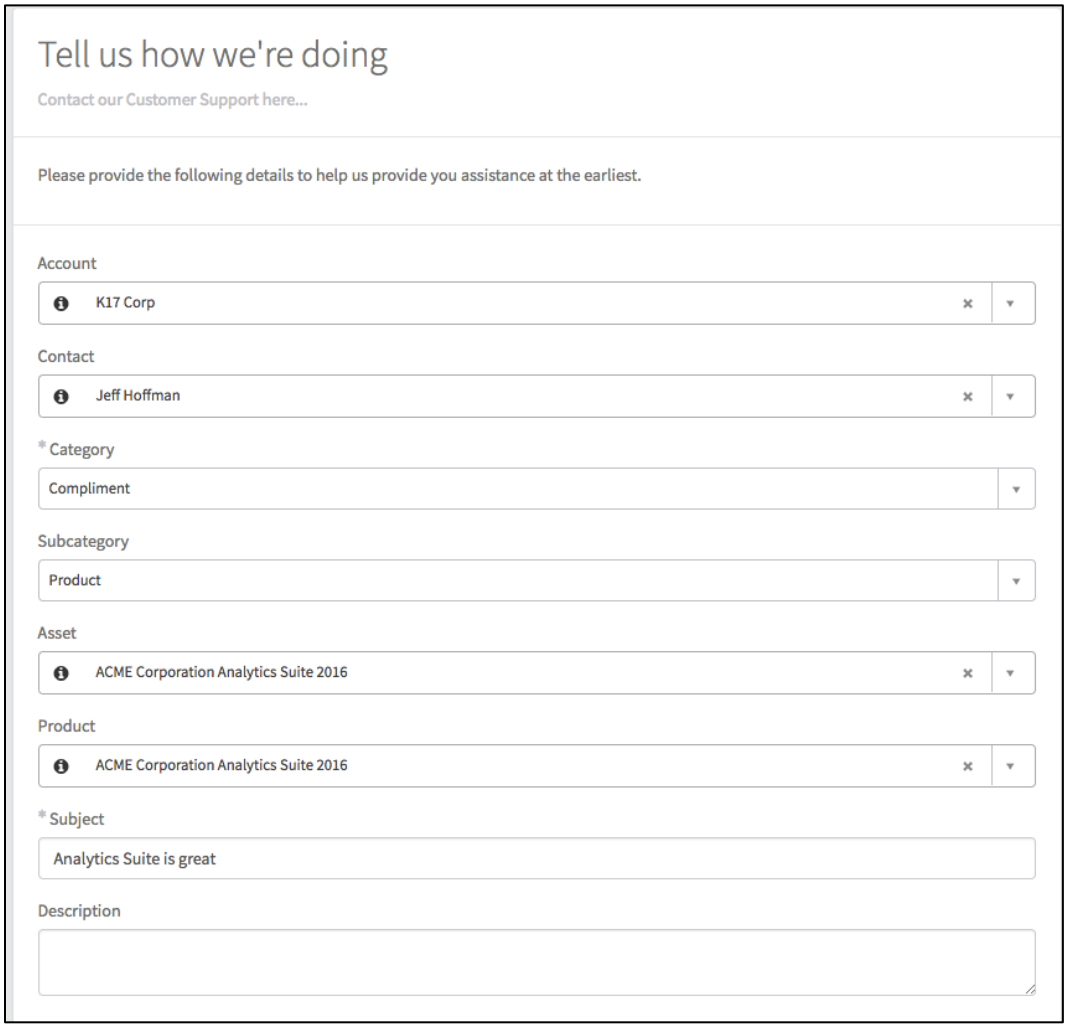
Now that the catalog item is created and configured, log in as **Primary Contact** and test it.

1. Open a new Incognito Window.
2. Enter **https://[LabInstanceName].service-now.com/csm**.
3. Navigate to **Catalog** > **Support**.

4. Scroll to **Browse Service Catalog**. Click **Tell us how we're doing**.



5. Fill out the form.



6. Click **Submit**.

7. The case can now be viewed on the UI ticket page. Note that the case was assigned to **John Jason** because he was in the assignment group and possessed the proper skill.

Lab Goal

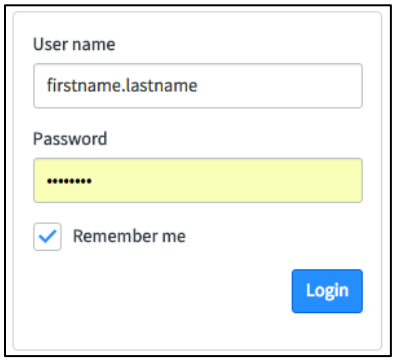
Lab 6.0
CSM System Properties

This lab explains how to set up and configure the CSM Properties in the property administration page. Although this is not necessary to make the application work, doing it properly prevents hard-to-find issues. The lab includes the following tasks:

- Special Handling Notes
- Account Relationship Types

Log On to Your Training ServiceNow Instance

1. Navigate to the unique instance URL provided to you.

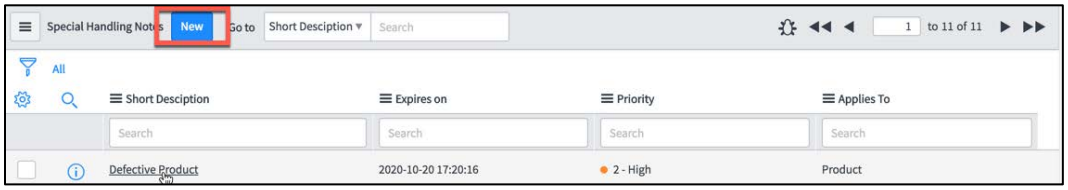


2. Log on with the provided HR Admin credentials.

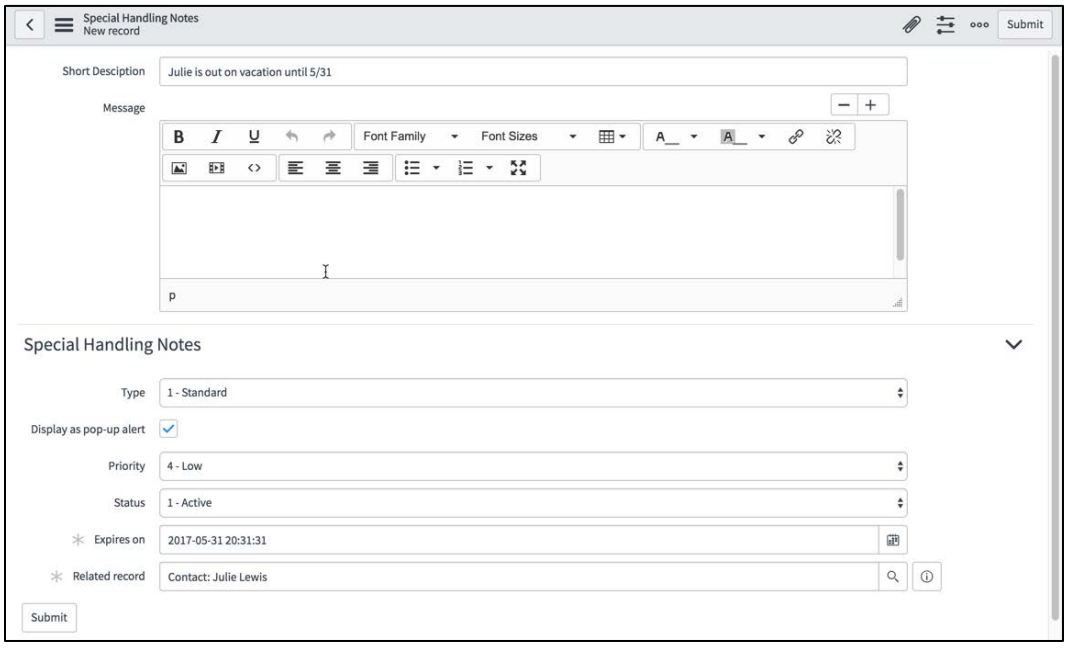
Configure Special Handling Notes

The options within **Customer Service Management** allow for the configuration of special instructions or alerts that can proactively alert an agent or manager of critical information pertaining to an account, contact, case, or asset.

1. Navigate to **Customer Service>Contacts** and open **Julie Lewis.**
2. Go to **Configure>Form Layout**.
3. Add **Special Handling Notes pop-up** to the Contact form.
4. Click **Save**.
5. Navigate to **Special Handling Notes** and select **New**.



6. Set the **Special Handling notes** to notify the user that a contact is on vacation until 5/31.

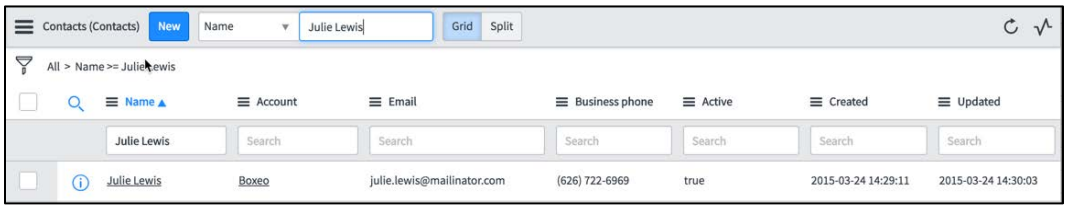


7. Select Related Record Table Name: **Contact** Document: **Julie Lewis**.

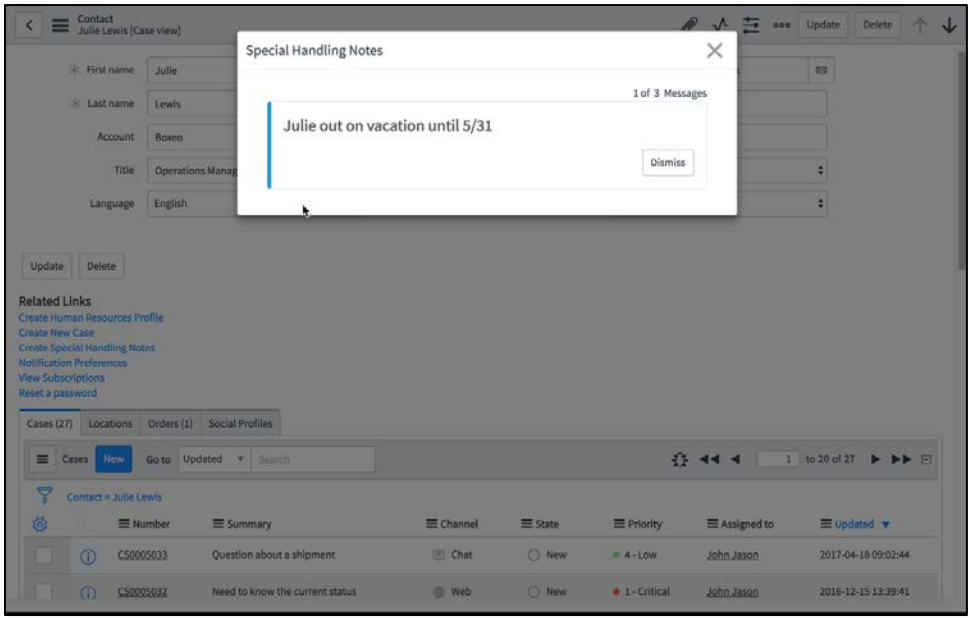


8. Click **Submit**.

9. Navigate to the Contacts and search for Julie Lewis.



10. Click on Julie Lewis and see the alert popup.



Create an Account Relationship Type

1. Navigate to **Customer Service > Administration > Account Relationship Types**.
2. Open **Partner Account**.



3. Review the fields on the **Account Relationship Type** form.
4. Navigate to **Customer Service > Accounts > Boxeo**.
5. Review the records on the **Account Relationship Types** list.

