Implementation

Certified Implementation Specialist - Customer Service Management

KNOWLEDGE CHEATSHEET

DELIVER MEASURABLE SERVICE VALUE

Discover Pain points → **Design** Use cases → **Deliver** Core capability → **Measure** Outcomes

01 Implementation and platform foundations

Outcomes, workshops and delivery

- **Start with business pain points**, customer journeys and measurable success criteria. A successful CSM implementation depends on sound service processes as well as configuration.
- **Workshops** establish personas, use cases, requirements and prioritized stories with acceptance criteria. Bring process owners into decisions and explain the operational and cost implications.
- **Now Create** structures delivery through Initiate, Plan, Execute, Deliver and Close, with exit gates. The engagement manager coordinates stakeholders and delivery; technical specialists resolve solution details.
- **Phased releases** deliver core capabilities early for near-term value. Prefer baseline functionality, scalable designs and usable mobile experiences before adding specialized behavior.

Configuration, scope and setup

- **Configuration** adapts supported settings and extension points. **Customization** adds or changes behavior beyond the baseline; assess business value, upgrade impact and maintenance before proceeding.
- **Application scope** contains application artifacts and controls cross-application access. Scope protections complement record security; they do not replace access control rules.
- **Plugins and Store applications** deliver CSM capabilities and dependencies. Activation can install additional components; Guided Setup provides configuration tasks and checklists.
- **Demo data** belongs in learning or evaluation environments. Establish a clean production release path and validate configuration and data separately before deployment.

Foundation data and migration

- **Foundation data** includes accounts, contacts, consumers, products, assets and service coverage. Migrate transactional records such as cases and knowledge only with clear ownership and mappings.
- **Import sets and transform maps** stage and map external data into target tables. Cleanse duplicates, validate reference relationships and check field lengths before loading.
- **Coalesce fields** identify existing target records for updates. Reconcile counts, sample important relationships and test repeat imports; import order matters when records reference each other.
- **Knowledge attachments and embedded images** need an explicit migration plan. Preserve article structure and access controls, then validate search and visibility after migration.

Customer & Product Data

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KNOWLEDGE CHEATSHEET

CONNECT THE CUSTOMER TO SERVICE

- **Identity** — Account or consumer
- **Product** — Model and instance
- **Coverage** — Entitlement and SLA
- **Access** — Responsibility

02 Customer, product and service data

Business models and customer identities

- **B2B** supports organizations through accounts and contacts; **B2C** supports individuals through consumers. B2B2B, B2B2C and B2B2E represent service chains through another business to businesses, consumers or employees.
- **Account** represents an external organization; the Account table extends Company. A **contact** is a person associated with an account, with additional contact relationships supporting multiple accounts.
- **Consumer** stores the individual customer identity. A **consumer user** links that customer to a login; having a consumer record alone does not establish portal authentication.
- **Household** groups consumers who share an address or use services together. Household membership relates consumers to the group; consumer addresses can be classified with address types.

Relationships and account teams

- **Account relationships** connect a source account and target account through a relationship type. An account hierarchy and a defined relationship serve different purposes; model both deliberately.
- **Partners** help sell, deliver or support services for related customers. Distinguish the commercial partner relationship from an outsourced third party performing delegated work.
- **Account teams** assign internal people responsibilities for an account. A unique responsibility limits who can hold that responsibility on the same account, rather than reserving it across every account.
- **Customer Access Management** gives related parties responsibility-based access to cases and products. Configured access to a sold product can extend to its cases; a hierarchy alone is not a blanket data grant.

Personas and record security

- **Customer and consumer users** receive external self-service access. **Customer admins** add delegated contact administration; partner admins administer contacts within their authorized partner and customer relationships.
- **Agents** create and work cases; **managers** oversee service operations. Consumer-support permissions and specialized administration permissions must be assigned for their intended tasks.
- **Proxy contacts and contributor users** let eligible employees request support or create work on behalf of customers. This does not automatically make them case fulfillers.
- **snc_internal** and **snc_external** distinguish mutually exclusive user populations. Combine persona roles, ACLs and **CSM Query Rules** to restrict records; hiding a portal widget is not security.

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Product model, asset and configuration item

- **Product model** describes a product or service type and its shared specifications. **Asset** represents a specific supported instance; CSM uses the platform asset framework with customer-service information.
- **Configuration item (CI)** represents configuration and operational relationships in the CMDB. An asset can have a linked CI, but not every asset needs a CI.
- **Model categories** classify models, associate asset classes with CI classes and govern applicable asset/CI creation. Asset classes distinguish hardware, consumables, software licenses, enterprise software and facilities.
- **Non-configurable attributes** belong with the product model. Reuse an appropriate model class for shared attributes; extend a suitable model table when a product needs a genuinely different schema.

Sold, installed and deployed products

- **Sold product** records what a customer purchased. **Install base item** represents a deployed or provisioned instance; **installed product** associates the sold product with the install base item.
- **Service-aware install base** connects customer-facing products and deployments to operational CIs and services. Agents can identify the affected instance, its configuration and the customers exposed to service issues.
- **Parent install base item** builds deployment hierarchies. Relate a case to the affected item; a single reference identifies one item, while multiple affected items need the appropriate relationships.
- **Model attributes** describe shared properties; **install base attributes or characteristics** capture instance details. Use supported characteristics for informational details before introducing custom fields or tables.

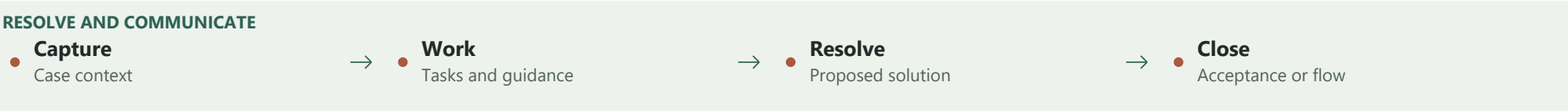
Contracts, entitlements and SLAs

- **Service contract** records the service agreement. **Entitlement** defines eligibility and support allowance for a customer, product, asset or other supported service entity.
- **Entitlement units** can count cases or hours. Usage limits and remaining allowance are separate from the elapsed-time targets measured by an SLA.
- **Service Level Agreement (SLA)** defines service commitments such as response or resolution times. Schedules, start/pause/stop conditions and time zones determine task SLA measurement.
- **Case entitlement evaluation** connects the case to applicable coverage. Validate customer, product or asset and contract applicability rather than treating a knowledge article as the contract record.

Case Management

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KNOWLEDGE CHEATSHEET



03 Case lifecycle and coordinated resolution

Interaction, case and resolution

- **Interaction** records a request for assistance through a channel such as phone, chat or walk-up. A **case** tracks resolving an external customer question or issue beyond that interaction.
- **Case creation** can start in the customer-service application, from customer records, through a portal or through configured channels. Capture the customer, affected product or service, issue and contact context.
- **Typical lifecycle:** New, Open, Awaiting Info, Open, Resolved, Closed. Awaiting Info represents a need for customer input; rejection of a proposed resolution returns the case to Open.
- **Resolved** means a solution has been proposed; **Closed** completes the lifecycle. Record clear resolution notes and satisfy the case type's required resolution information.
- **Auto Close Resolved Cases** is a Flow Designer flow that must be enabled. Its standard timing sends a reminder after five days and closes after ten days without response; administrators can configure timing and exclusions.

Case types and delegated work

- **Case types** specialize the Case table with their own fields, forms and processes. Extend **sn_customerservice_case** for a new case type; the lowest type in a hierarchy is a leaf.
- **Case tasks** assign additional work needed to resolve a case. They remain related to the case while providing separate ownership and task progress.
- **Service definitions and relationships** can drive available case-task choices. Configure the applicable service-to-task relationships when a task selector needs to offer defined options.
- **State transitions** follow configured case-management logic, including baseline business rules. Add automation through supported flows and extension points without bypassing mandatory resolution controls.

Attention, handling notes and contact context

- **Action status** highlights what needs action or is blocking progress, including related tasks, approvals and customer input. It complements the lifecycle state and priority.
- **Needs attention** lets agents flag a case for review. Read the action-status label and underlying dependency rather than interpreting urgency from color alone.

Case Management / Routing & Workspace

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RESOLVE AND COMMUNICATE

Capture Case context → **Work** Tasks and guidance → **Resolve** Proposed solution → **Close** Acceptance or flow

- **Special Handling Notes** surface important instructions associated with customer or service context, such as VIP handling. Expiration and deactivation prevent obsolete instructions from remaining active.
- **Contact Local Time** helps agents choose a suitable time to contact the customer using the contact's time-zone context. Follow-the-sun support requires deliberate schedules, handoffs and routing.

Parent cases and major issues

- **Parent-child synchronization** propagates selected parent updates to eligible child cases. Configure synchronized fields and properties; terminal child states and process rules can restrict updates.
- **Major Issue Management** coordinates a widespread customer issue through a major case and affected customer cases. A proposed major-case candidate follows approval before major-case handling.
- **Customer cases** can become children of the major case, preserving each customer's communication and resolution context while common work is coordinated centrally.
- **Targeted Communications** uses recipient lists and publications to notify affected audiences. Define the impacted products, customers and recipients rather than broadcasting without qualification.

Escalation and case communication

- **Case escalation** addresses a particular issue; **account escalation** coordinates broader customer risk. Escalation templates define processing, approvals and response behavior.
- **Escalation access** depends on the requester's permissions and configured process. Check existing open escalations and approval setup when an escalation action is unavailable.
- **Case action summary** communicates work completed, next steps and status while a case is active. **Post case review** captures the issue, root cause, resolution and preventive actions after the work.
- **Case Digests** supplies structured communications and document templates. Keep customer-visible content appropriate for its audience and separate it from internal analysis.

04 Routing, workspaces and agent assistance

Matching rules and assignment workbench

- **Matching rules** pair case conditions with suitable agent resources. **Assignment rules** perform allocation; the two are independent records, so changes must be coordinated.
- **Resource matching methods:** Simple selects a resource; Advanced filters by conditions; Scripted applies custom resource logic; Selection Criteria supports workbench matching.

Routing & Workspace

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KNOWLEDGE CHEATSHEET

ROUTE WORK TO QUALIFIED AGENTS

Channel — What to route → **Queue** — Where to route → **Assignment** — Who receives it → **Workspace** — Agent action

- **Assignment Workbench** ranks agents with configurable criteria such as skills, assigned cases, availability and last assignment. Criterion types include Simple Match, Aggregate and Scripted.
- **Ranking configuration** controls whether a criterion is displayed, used for ranking or both. Choose more-is-better or less-is-better and appropriate thresholds; a high score is not a substitute for mandatory eligibility.

Advanced Work Assignment

- **Service channels** define what work AWA routes. **Queues** define where work waits; routing conditions select the queue and eligible assignment groups.
- **Assignment rules** define how work is offered to an appropriate agent. Consider presence or availability, capacity, skills and applicable schedules after selecting the group.
- **Capacity** limits concurrent workload; item sizes can reflect different effort across channels. An agent being present does not necessarily mean capacity remains.
- **Agent affinity** can favor continuity through historical work, related tasks or account-team responsibility. **Overflow** provides configured alternative assignment when normal handling cannot accept the work.
- **Agent experience** governs inbox presentation and acceptance. Support-desk design should align skills, languages, staffing, geography and support tools with the routing model.

Workspace context and collaboration

- **CSM Configurable Workspace** brings cases, customer context and tools together. Configure forms, headers, lists and contextual panels for the persona's work.
- **Dynamic Related Records** presents related record details in the contextual side panel. **Lookup and verify** helps confirm customer identity before sensitive service actions.
- **Sidebar** supports real-time collaboration with agents and subject matter experts. **Conversation History** preserves prior exchanges so customers need not repeat their issue.
- **Response Templates** insert consistent reusable text; chat quick actions can invoke them. **Agent Whisper** supports a private agent-supervisor exchange during a customer chat.

Guidance, search and prediction

- **Agent Assist and contextual search** surface relevant knowledge and configured record sources using the case or interaction context. Search-source configuration determines what can appear.
- **Guided Decisions** executes branching decision trees of questions, answers and guidance. **Playbooks** organize a case process into guided activities; common scenarios include onboarding, product support and complaints.

Routing & Workspace / Self-Service

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SUPPORT SELF-SERVICE JOURNEYS

- **Knowledge** — Find answers
- **Catalog** — Request service
- **Community** — Share expertise
- **Portal** — Follow cases

- **Predictive Intelligence** learns from historical records to support classification and triage. Validate training quality and prediction confidence before automatically populating case fields.
- **Trending Topics** clusters similar cases to reveal emerging volume drivers. **Case Spotlight** prioritizes attention using multiple weighted dimensions rather than a single priority field.
- **Auto-Responder** can send relevant knowledge suggestions when a case is created. Suggested content supports self-service; verify that the material is relevant and accessible to its recipients.

05 Portals, knowledge, catalog and communities

Customer portals and registration

- **Customer and consumer portals** offer self-service search, knowledge, cases and configured assistance channels. The Consumer Service Portal uses **/csp**; available functions depend on the portal and enabled capabilities.
- **Widgets** present portal data and interactions. Configure portal records, catalog associations, search and navigation for the audience; locale selection supports localized experiences.
- **B2B self-registration** associates a requested contact with an account through a registration code and approval process. Authorized account or service administrators review requests before granting access.
- **Consumer registration** establishes the consumer identity and related consumer user for login. Portal users can create and follow their authorized cases after registration.
- **Customer admins** can maintain authorized contacts; ordinary customer users manage permitted service records. Verify account, partner and company-hierarchy visibility with representative external users.

Knowledge structure and access

- **Knowledge articles** document known issues, product information and answers to common questions. **Knowledge bases** contain articles; their categories provide hierarchical organization within a base.
- **User criteria** control Can Read/Cannot Read and Can Contribute/Cannot Contribute at supported knowledge-base and article levels. Read access and authoring access are separate decisions.
- **Knowledge Product Entitlements** restrict relevant knowledge using customer products or assets and configured product access. Combine product eligibility with appropriate knowledge access criteria.
- **Article versioning** tracks updates through publication and revision. **KCS** embeds capturing, reusing and improving knowledge into service work; report a knowledge gap when relevant content is missing.
- **External knowledge integration** depends on the supported connector and content source. Plan category mapping, attachments, indexing and permissions rather than assuming every external repository behaves alike.

Self-Service / Integration & Analytics

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SUPPORT SELF-SERVICE JOURNEYS

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Catalog items and record producers

- **Catalog item** offers a requestable product or service. **Variables** collect structured answers; variable sets reuse related inputs across items.
- **Record producer** is a catalog interface that creates a target task record, such as a case. It differs from ordering a standard request item and its fulfillment process.
- **Customer Service and Consumer Service catalogs** support their respective audiences. Associate additional catalogs with the portal and apply relevant item visibility rules.
- **Flows and workflows** define fulfillment, tasks and conditional approvals. Approval is a business requirement for selected processes, not a mandatory step for every catalog workflow.
- **Product-model/catalog-item relationships** make relevant catalog actions available in product context. Test variables, record mappings and access from the customer's portal experience.

Communities and conversational self-service

- **Communities** support peer answers, customer engagement and product feedback. Forums distinguish public, registered and moderator participation with configured access.
- **Moderation** controls reported content through configured policies and thresholds. Authorized personnel can turn useful community content into knowledge or escalate a discussion into a case.
- **Virtual Agent** provides guided conversations such as checking case status or getting help. Enabled topics, integrations and permissions determine the actions a customer can perform.
- **Natural Language Understanding (NLU)** maps utterances to intents and extracts entities. Select a provider and enable NLU for the conversation experience; train and test language models with realistic phrasing.

06 Channels, integrations and service measurement

Email, telephony and social channels

- **Channel** identifies how the customer contacted support. Email automation distinguishes creating a new case from updating an existing case with a reply; preserve correlation and sender identity.
- **OpenFrame** embeds supported third-party telephony or communication tools. Configuration, group applicability and the provider integration control the experience; validate screen-pop and call-to-record behavior.
- **Social profile** represents the customer's social identity; **social logs** hold related conversation details. Channel support and automatic case creation depend on the installed integration.
- **Microsoft Outlook add-in** lets authorized users work with contacts and cases using email context. **Integration Hub** supplies reusable integration actions for connected CRM, ERP and other systems.

Integration & Analytics

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CONNECT OPERATIONS AND IMPROVEMENT

Detect Service impact → **Coordinate** Operational work → **Communicate** Customer updates → **Improve** Indicators and tasks

IT service and field service integration

- **ITSM integration** relates a customer case to incident, problem and change work. The case owns customer communication while operational teams handle the underlying service issue.
- **Related-task updates** can drive case action status and follow-up. Customer visibility and approvals for related records require the appropriate integration, roles and portal configuration.
- **Request Management integration** is a separate capability to configure alongside other service-management integrations. Access to a case does not automatically authorize every ITSM operation.
- **Field Service Management** creates work orders and dispatches work for on-site resolution. Customers can track permitted related work; initial field copying does not imply continuous bidirectional synchronization.
- **Mobile field work** can support offline task execution and selected work-order or asset actions when configured for offline use. **Walk-Up Experience** supports location-based service and appointment check-in.

Proactive customer service operations

- **Proactive Customer Service Operations** combines service-aware install base, service monitoring and proactive case handling to address customer impact before inbound reports accumulate.
- **Event Management** detects operational events and alerts. Link affected services and CIs through the install base to determine which customer deployments are impacted.
- **Proactive cases and notifications** coordinate remediation and communication for affected customers. Targeted outreach can reduce repeat contacts and time to resolution; outcomes depend on process and data quality.

Integration & Analytics

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Dashboards, indicators and improvement

- **Reports** summarize records; **Performance Analytics** collects indicator scores over time. Breakdowns segment scores by dimensions such as group, channel or product.
- **Dashboard tabs** organize reports and widgets. **In-form Analytics** places contextual breakdown information near a record so agents can examine performance without leaving their work.
- **Historical data collection** establishes past indicator scores where source history supports it. **Daily collection** maintains subsequent scores; a content pack alone does not populate every historical metric.
- **Leading indicators** look ahead and are often actionable, such as aging unresolved work. **Lagging indicators** measure achieved outcomes, such as completed-case resolution time or satisfaction.
- **Continual Improvement Management** turns performance gaps into initiatives, phases and tasks. Define baselines and targets, track progress and evaluate whether service outcomes improve.