Connected Servicing v1 PDF

A new version of Appian is available! Update now to take advantage of the latest features in Appian 22.2.

This content applies solely to Connected Servicing, which must be purchased separately from the Appian base platform. This content was written for Appian 21.1 and may not reflect the interfaces or functionality of other Appian versions.

Connected Servicing Overview

Introduction

Appian's Connected Servicing solution is a flexible, easy-to-deploy, and fully customizable application for your organization's unique customer life cycle management processes. Whatever your process has been, Appian Connected Servicing will help you keep track of all the tasks that go into keeping your customers happy.

This page provides a quick overview of all the ways Appian Connected Servicing can help your organization. If you would like a more comprehensive overview of the application, check out What is Appian Connected Servicing?

Simplify and accelerate your customer lifecycle management

Customers' needs change and grow throughout their time with your organization. It is vital to respond quickly and accurately to any requests that your customer might have in order to keep them happy. Ensuring that the littlest details don't slip through the crack is a great way to build trust and grow your business.

Lack of coordination, poor visibility, or an inability to quickly adapt to your customers' changing needs can cause strain. Commercial-off-the-shelf products and manual processes that rely on spreadsheets and emails are too rigid and slow to respond to this dynamic environment.

Built on the Appian low-code platform, Connected Servicing offers adaptability, extensibility, and speed-to-market. You can fast-track customer requests with an application that can be configured to your own unique and complex processes.

What does Appian Connected Servicing provide?

Customizable process templates

You can create templates that will automatically assign tasks based on the types of customer requests that you field. Notice a task that is always being reassigned or marked not needed? Update the template so end users don't have to manually update it each time.

Automated efficiency

With Connected Servicing, you'll receive:

- Connectors to many of the industry's leading data providers.
- Document classification using Appian's Intelligent Document Management (IDP).
- Framework for using Appian's Robotic Process Automation (RPA) to complete tasks in other systems.

Full transparency for a single view of the customer

Ensure everyone in your organization is on the same page. Combine disparate data from legacy processes, systems, and checklists into a single platform. Break down barriers and clarify the status of customer requests through a single view for each of your customers.

Document management for fewer errors

Connected Servicing allows you to upload, manage, and track the status of documents. Appian's Intelligent Document Processing (IDP) will automatically classify your documents in order to ensure that the correct documents are being reviewed.

Up-to-date security through organizational changes

Organizational change is a fact of life. Quickly respond to changes in your organization with the ability to update security group membership from an easy-to-use interface. Whether it's employees changing teams or leaving the organization, Connected Servicing is flexible enough to allow you to update access quickly.

Secure, fast, and integrated processes

De-risk your deployment with the security, scalability, and reliability your customers demand. Rapidly respond with a flexible configuration that adapts to your organization's style and processes. Fast-track customer requests with integrations that fit your unique workflows and environment.

Get started now

Ready to get started? Check out the topic browser on the left to see all of the content covered in the Connected Servicing documentation.

What is Appian Connected Servicing?

Introduction

The Appian Connected Servicing solution is a customizable, expertly-developed application built on Appian's low-code platform. This solution allows financial services professionals to complete customer requests, such as a strategy update or an ad-hoc reporting request.

The application consists of a few main sites that will vary depending your role:

- The Connected Servicing site allows users to:
  - **Create servicing requests**: Enter in all the data needed to create a service request for a customer so that all of the information for an onboarding is in one location.
  - **Create, configure, and complete service request tasks**: Each service request process is completely configurable. Customizable processes automatically assign tasks based on the type of service request. You can then add, edit, and rearrange those tasks as needed.
  - **Maintain visibility into the state of service requests**: View all of the data for requests in one location. Break down barriers and clarify the status of requests through customer summaries, visibility of tasks, and milestone progress.
- From the front end of the application, the Connected FS Settings site allows business users to:
  - **Manage service requests processes**: You can create a library of tasks, categories, and templates that make it easy to manage your processes. Your processes can be as flexible as you need them to be. Realizing that users are always marking a task as not needed? Remove the task. Have a new task that needs to be done for a specific service request type? Add a task.
  - **Configure key values**: Making changes to processes quick and easy is what we are all about. Adding a product to your business offerings? This can be completely handled by the business users who know this process best.
  - **Update group membership**: If someone changes departments or leaves their role, updating their access is just a click away.
- The Customer Portal site allows your customers to:
  - **Upload Documents**
  - **Complete Tasks**
  - **Connect with your Client Services team**

Check out Create New Service Requests, Viewing Service Requests, Updating Service Requests, and Managing Customers for more information on creating and managing service requests and customers.

Service request example

Let's take a look at an example scenario:

Acme Banking Corp receives a request from their customer, MRG Limited, to change their investment strategy. A client service representative enters all of the details for the requested changes and creates a service request. Depending on certain the type of request, the Connected Servicing application selects which service request template to be used for this particular situation.

This service request template determines what tasks are sent to which groups. For example, the legal team may get tasks to upload certain documents, while the middle office team may get tasks to update the investment systems.

Everyone who has received a task will be able to view, update, reassign, and complete tasks from one cohesive record view. Certain business users can even modify the underlying templates and add additional tasks. For example, if users find that they are always adding a task to certain request types, an authorized business user can update the template so that all future service requests of that type will include that task.

Connected servicing site

Home page

When you log in to the Connected Servicing site, the **HOME** page displays. This page contains several features that help business users get a quick view of information that is pertinent to them:

1. **New Service Request button**: shortcut to create a new service request.
2. **Service Requests By Count:** a breakdown showing the number of service requests open and the number that are at risk.
3. **Service Requests By Type:** a chart showing the number of service requests segmented by type.
4. **Scheduled Requests:** a chart showing the upcoming scheduled service requests.
5. **Owners:** which users are primary service request owners and how many requests are assigned to them.
6. **Customers:** which customers have service requests and how many requests are open.
7. **Open Request List:** ability to view and filter service request data.

Note that managers and general users will have a slightly different home page view. We want general users to be able to focus on their tasks, so they will only see their tasks that are assigned to them or their team. They also won't see the bar charts.

Additionally, the top of the page contains links to the **SERVICE REQUESTS** and **CUSTOMERS** records lists as well as the **TRENDS** tab.

Record lists

Clicking any tab on the top of the page takes you to the associated record list. From the record list page, you can:

1. Create a **NEW SERVICE REQUEST** or a **NEW CUSTOMER**.
2. Search and filter the record list.
3. View a short summary of information about the records.
4. Click a name to open the associated record summary view.
5. Export the record list to Excel, clear filters, and refresh the record.

Connected FS Settings site

Connected FS Settings is a separate site in the Connected Servicing application.

It allows business users to:

1. Manage servicing request processes, including managing task categories, tasks, and templates.
2. Add and remove members from groups.
3. Configure default values including: account types, customer types, document types, and product types.

Only business users with the appropriate group membership are able to access this site. This ensures that only a select few have access to sensitive processes and information. See Accessing the Connected Settings Site for instructions and prerequisites for accessing the site.

Using Connected Servicing Documentation

Introduction

Appian Connected Servicing is an expertly-developed application that is meant to be customizable to the needs of different organizations. The Connected Servicing documentation helps guide Appian developers through this customization.

This page outlines who the Connected Servicing documentation is meant for, as well as how to navigate it.

Who is the audience?

The Connected Servicing documentation is meant to help Appian developers understand the application and guide them on how to customize it.

The instructions in the **USING CONNECTED SERVICING** pages were written to help developers understand the default functionality of the application. We expect that there will be modifications to the default application and that these instructions won't apply to all implementations. Therefore, it isn't meant to be used as an end user guide, but can be used as a starting point for an end user guide.

How do I navigate?

Use the content browser on the left side of the screen to navigate between pages. The **ON THIS PAGE** section on the right side of the screen can be used to navigate to specific headings on the page.

This documentation is made up of the following sections:

- **GETTING STARTED**: The getting started pages have some overview information about Connected Servicing, as well as information on the initial installation and set up of the application.
- **USING CONNECTED SERVICING**: This section of documentation is meant to help developers understand how the Connected Servicing solution is used.
- **CONNECTED SERVICING SETTINGS**: This section is for understanding the front-end changes to the application that can be done by a business user.
- **SYSTEM ADMINISTRATION CENTER**: This section is to help a System Administrator understand how to control basic properties of the connected systems that come with the Connected Servicing Application.
- **MODIFYING CONNECTED SERVICING**: This section is meant to guide developers on how to customize the application for their organization.
- **REFERENCE**: These pages include reference material that developers can use to quickly look up information for APIs, group security, and reference data.

In addition, the CONNECTED SERVICING landing page contains high level information about the benefits of Appian Connected Servicing.

Installing Connected Servicing

Introduction

Installing Connected Servicing consists of four main steps:

1. Download the software package.

2. Deploy Connected Servicing plug-ins to the Appian environment.
3. Create the database objects in the business data source.
4. Import the Connected Servicing application into the Appian environment.

Before starting the installation process, review the System Requirements to make sure all minimum requirements are met.

System requirements

- Appian platform running version 21.1 or greater.
- A supported version of MariaDB as a business data source.
  - **Note**: Instructions below are for MariaDB databases. For use with other databases, the SQL script used in **Step 3** will need to be modified.
- A supported web browser.

Technical support

Current customers can log into Appian Community and open support cases. All users of Connected Servicing can also email Appian Support at support@appian.com.

Step 1: Download software package

The first step in installing Connected Servicing is to download the software package that contains the following files. These files will be used in the remaining set up steps.

- **ConnectedServicingv1.0.0.sql**: SQL script for creating the database objects needed for the Connected Servicing application.
- **ConnectedServicingv1.0.0.zip**: Application package to import into Appian.
- **ConnectedServicingv1.0.0.properties**: Import customization file for configuring the application package.
- `dunAndBradStreet-1.0.1.jar`: JAR file used to deploy the Dun And Bradstreet Connected System plug-in for self-managed environments.
- `northrow-1.0.1.jar`: JAR file used to deploy the Northrow Connected System plug-in for self-managed environments.

To download the software package:

1. In My Appian, navigate to the Support tab.
2. At the top of the page, select **DOWNLOADS** and then **SOLUTIONS**.
3. In the grid, click **Connected Servicing**.
4. On the right side of the page, under Downloads, click **Connected Servicing Components** and agree to the License Agreement.
5. Click **Connected Servicing Components** to download the ZIP file.
6. Unzip `ConnectedServicingv1.1.0.zip` to access the installation files.

Step 2: Deploy plug-ins

Connected Servicing relies on the following plug-ins to be deployed and configured in the target system before the application files can be imported.

The following plug-ins can be downloaded directly from the Appian AppMarket:

- Appian Solutions Plug-in (v1.9.0)
- Google Cloud AutoML Connected System (v1.1.0)
- Google Cloud Storage (v1.1.0)
- CDT Manipulation (v2.0.1)
- Advanced Unzip (v1.3.9)

The following plug-ins are included in the software package zip file noted in Step 1:

- `dunAndBradStreet-1.0.1.jar`: JAR file used to deploy the Dun And Bradstreet Connected System plug-in for self-managed environments.
- `northrow-1.0.1.jar`: JAR file used to deploy the Northrow Connected System plug-in for self-managed environments.

Once all plug-ins are downloaded, deploy the plug-ins to all environments. The steps for deploying plug-ins are different depending on if you have an Appian Cloud or self-managed environment.

Appian Cloud environments

To deploy the plug-ins for an Appian Cloud environment:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Admin Console**.
3. On the left side of the console, click **Plug-ins**.
4. Click **DEPLOY NEW PLUG-INS**.
5. Search for and click `Appian Solutions`.
6. Click **DEPLOY**.
7. Repeat the above steps, but search for and click `Dictionary Manipulation`, `Advanced Unzip`, `Google Cloud Storage`, `Google Cloud AutoML`, `Northrow Bearer Token Connected System` and `Dun And Bradstreet Direct 2.0 Authentication Token CS`.

Self-managed environments

To deploy the plug-ins for a self-managed environment:

- Follow the Deploying Plug-ins instructions to deploy the `Appian Solutions Plugin`, `Dictionary Manipulation`, `Advanced Unzip`, `Google Cloud Storage Connected System`, `Google Cloud AutoML`, `Northrow Connected System` and `Dun And Bradstreet Connected System` plug-in files that were downloaded in Step 1.

Step 3: Create database objects

In order to create the structure for the database tables, views, and other objects that are a part of the Connected Servicing application, you will need to run a DDL script in your database.

To create the database objects:

- In your MariaDB business database, import and run the `ConnectedServicingv1.0.0.sql` DDL file that was downloaded in Step 1.

Step 4: Import the application

Next, install the Connected Servicing application is to import the application files into the target environment.

To import the application:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Appian Designer**.
3. Click **IMPORT**.
4. Click **UPLOAD** and choose the `ConnectedServicingv1.0.0.zip` file that was downloaded in Step 1.
5. Select **Include related import customization file** and click **UPLOAD**. Select the `ConnectedServicingv1.0.0.properties` file that was downloaded in Step 1.
    - **Note**: If you have credentials for any of the integrations, you may include them in the properties file.
6. Click **IMPORT**.
    - **Note**: The import may time out due to file size, but import will continue in the background.
7. Review the import results.
8. In Appian Designer, verify that the process `AS TMG Set Group IDs` ran successfully.
9. If the processes did not run, complete the following steps:
    - From Appian Designer, open `AS_TMG_BOOL_NEED_TO_RUN_GROUP_ID_UPDATE_AFTER_IMPORT` constant.
    - Set the **Value** to true.
    - Click **SAVE**.
    - From Appian Designer, open `AS TMG Set Group IDs` process.
    - Click **File** then **Run Process for Debugging**.
    - Ensure the process completes successfully.

> If the business database is not called `Appian`, a warning will occur when importing the data stores. To fix this, after the import is complete, open each data store object and update the **Data Source** dropdown list.

Step 5: Configure User Start Pages

After your import is completed, you should set up User Start Pages in the Appian Admin Console. This will ensure that when your users log in they will automatically be directed to the correct site.

The recommended start pages for the Connected Servicing user groups are:

Group	Start Page URL
Customers	https://< ENVIRONMENT-NAME >/suite/sites/customer-portal
AS FS Internal Users	https://< ENVIRONMENT-NAME >/suite/sites/connected-servicing
AS FS Appian Administrators	https://< ENVIRONMENT-NAME >/suite/design

Next steps

Now that the application is installed and the database is set up, you're not quite done yet. There are a few more steps you need to take to get your application up and running.

If you're using any integrations: Companies House, Dun and Bradstreet, Intelligent Document Processing, or Northrow, there are some prerequisites to complete and minimal configuration needed from the System Administration Center.

After that, you're going to want to configure the application for your organization's needs. How to Configure Connected Servicing outlines the steps you will need to take to modify the application to work with your organization's requirements.

Additional specifications such as branding and timezone can be set in the Appian Admin Console.

> Do not delete objects in the environment. This can cause problems with future Financial Services solution setups and must be avoided. To learn more about how to safely edit these objects, go to the modifying shared objects section of our documentation.

How to Configure Connected Servicing

Introduction

Connected Servicing is as flexible as any application developed in Appian. In order to make sure your application remains scalable and aligns with best practices, we have provided instructions to guide you through some of the most common changes.

After you have installed Connected Servicing, there are several configurations you will likely perform to customize the application for your organization's processes.

This page outlines the order we recommend for configuring the default application to work for your organization after installing Connected Servicing. However, all of these instructions can be used to modify the application at any time.

> Updates in Appian Designer should be done with caution by someone familiar with Appian development.

Modifying objects

To make sure you always have the default interfaces, expression rules, and process models to refer back to, we suggest the following if you need to customize the solution:

- Create copies of the interfaces, expression rules, and process models you want to update.
- Name them with the suffix of _CUSTOM. For example, something different than `AS_SRQ_FM_servicingSummary_CUSTOM`.
- Use your new objects instead of the original objects.

> Do not create copies of the CDTs. This would require you to update every reference to the CDT in the application. Instead, just modify the default CDTs provided in the application.

Following this paradigm will reduce the time and effort required to upgrade or add an additional Connected FS solution to your environment.

Step 1: Configure user groups and security

Configuring user groups and security is a good place to start.

You will need to know:

- If your organization has any additional business roles that are not covered in the default business groups.
- What users should be members of each business group.

For more information on how to configure groups and security, see the following pages:

- See Modifying Groups to understand how to modify groups to fit your organization, as well as how to add users to the appropriate groups.
- See Groups Reference Page for more information about the default groups in Connected Servicing and what they provide access to.
- See Managing Group Membership for instructions on adding users to groups from the front-end Connected FS Settings site.

Step 2: Set default system behavior

The following application behaviors should be configured based on your organizations preferences.

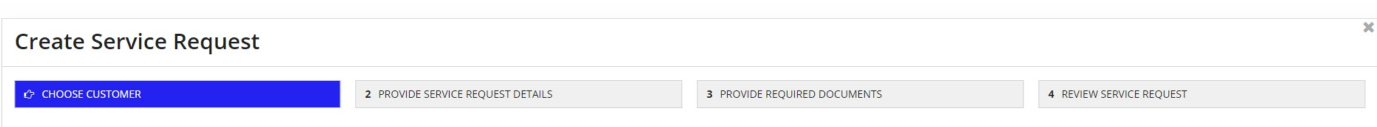
- Enabling or disabling comment notification.
- Turning integrations on or off.
- Setting the default currency.

See Setting Default System Behavior for instructions on how to update this behavior.

Step 3: Configure the create a new service request process

The create a new service request process consists of the following data-entry steps:

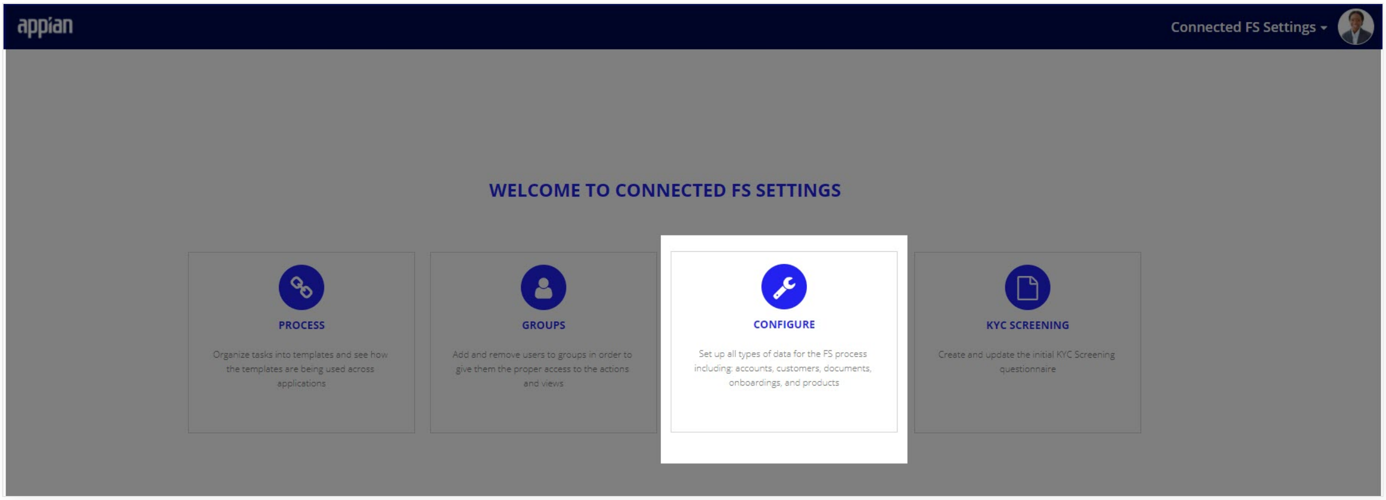
1. Choose a customer.
2. Provide service request details.
3. Provide required documents.
4. Review service request.



These steps can be modified to fit your organization's processes and data requirements by configuring service request values, fields, labels, and validations.

Configure service request values

There are several key dropdown values within the create new service request form that are instrumental in tailoring the Connected Servicing process to your organization. In order to adapt Connected Servicing for your organization, a business user can easily set these values and relationships in the **CONFIGURE** tab of the Connected FS Settings page.



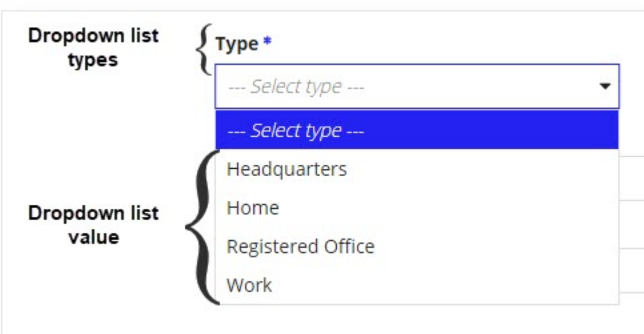
A business user will be able to set up:

- The values of account types, customer types, document types, and product types.
- Document examples to train the IDP classification process.

The configuring service requests page describes how to fully use the configure tab of the Connected FS settings page.

Configure dropdown lists

Most dropdown lists that are required for creating a service request can be configured by a front end business user in the Connected FS Settings page. The dropdown lists that cannot be set in the Connected FS Settings page are stored in reference tables. A dropdown list type is how you group dropdown list values, such as Request Status. You can update these values by updating the reference data tables.



You will need to know:

- What changes are required for the dropdown list values?
- Do you need any additional dropdown lists?

As long as you haven't loaded any data into the application, deleting unnecessary dropdown list values from the reference data tables should not cause a problem. Application setup is the only time you should delete any values from reference data tables, and you must do so with care. However, you should never delete the data from a shared table. These include:

- AS_FS_R_COUNTRY
- AS_FS_R_CURRENCY
- AS_FS_R_DATA
- AS_FS_R_GLOBAL_INDUSTRY_CLASS
- AS_FS_R_M_CURRENCY
- AS_FS_R_REGION
- AS_FS_R_STATE

These tables are shared within the Financial Services applications. These applications were built to work together, and if your organization ever decides to use more than one Financial Solution application, deleting rows from these tables could cause problems. However, adding or editing rows is fine. If you don't need a value from one of these tables, make the value inactive instead of deleting it.

When setting up your application, do not delete all of the values for a certain dropdown list type. If you do delete a dropdown list type, you will need to remove any references to that dropdown list type in the application.

For instructions on how to modify these types of reference data, see the following pages:

- See Modifying Dropdown Lists for instructions on how to:
    - Modify the dropdown list values.
    - Add new dropdown lists types.

Configure fields and UI text

It is likely that the default fields and UI text throughout the create new service request process will not exactly match your organization's requirements. You can configure them to meet your organization's needs.

For each of the create new service request data-entry steps, you will want to know:

- What fields are not applicable.
- What fields need to be added.
- What UI text needs to be modified or added.

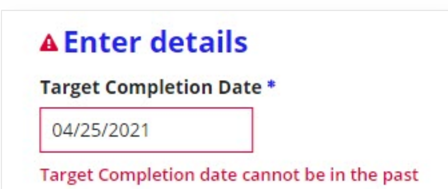
For instructions on how to modify fields and UI text, see the following pages:

- See Modifying Record Fields for instructions on how to add or modify the fields that appear in the application interfaces and store data.
- See Modifying UI Text for instructions on how to modify UI text using bundle files.

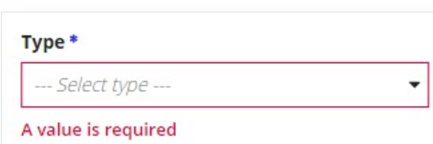
Configure validations

The create new service request process includes many validations by default, including validations that:

- Prevent invalid data from being entered into certain fields.



- Ensure that all of the required information has been entered for an service request.



The Modifying Field Validations page describes the default validations and how to modify these validations.

Step 4: Create service request process templates

After you have configured your application, you can create the service request process templates to be used during the create new service request process. The service request process templates determine which tasks will be assigned by default for each new service request that is created.

You will need to understand your organization's current service request processes including:

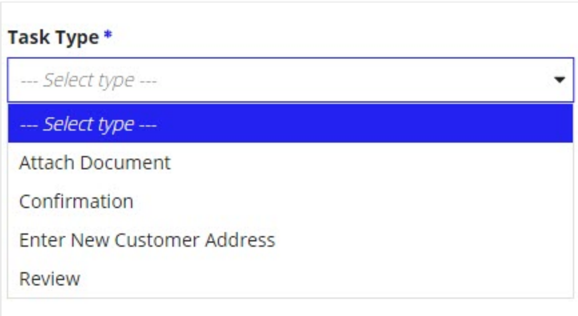
- What categories to organize the tasks by.
- The distinct types of service requests that have a standard set of tasks.
- All of the tasks required to complete the various types of service request.
- What types of tasks your organization will need.
- Which business groups are responsible for each task.
- What tasks rely on other tasks to be completed first.
- What the expected due dates are for each task.

Before you create any templates, you will need to set up the attributes that will be used to select an service request template. Out of the box, service request templates are chosen based on the **Type** and **Subtype** of the service request. See Modifying Service Request Template Selection

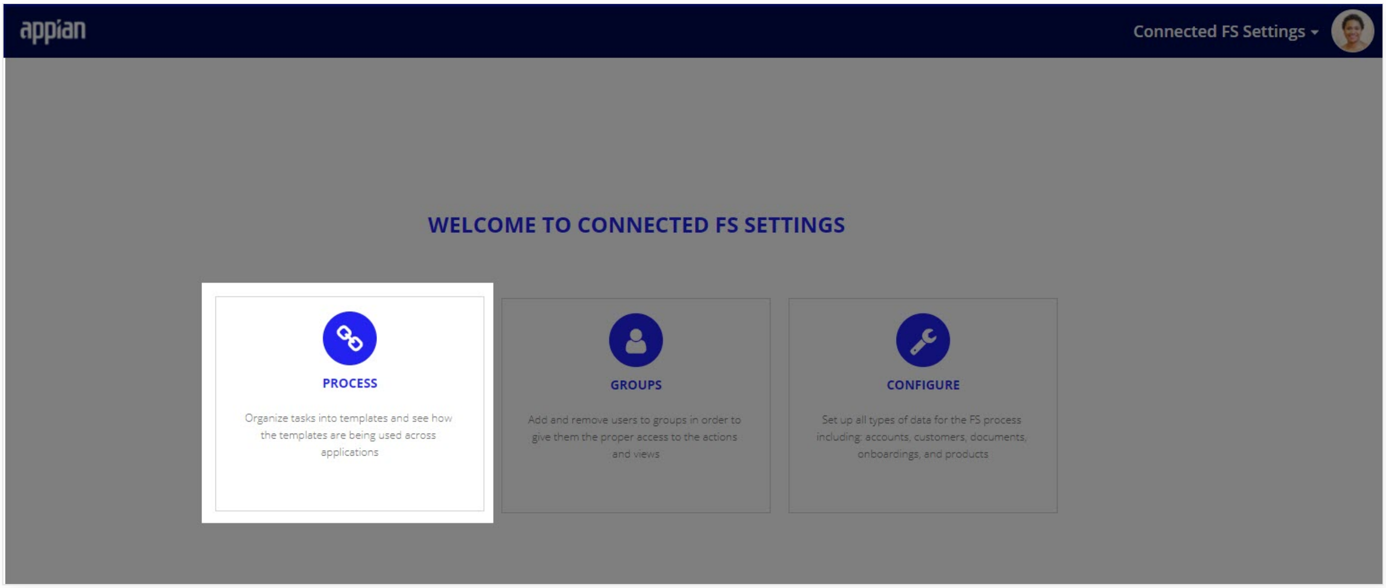
Attributes for instructions on how to modify these attributes.

You will also need to confirm which key dates the task due dates should be based on. By default, the task due dates are based off of the service request's target completion date. You can also modify key dates that are available for calculating task due dates.

When users create new tasks, they can choose from attach document, review, and confirmation. If you need different types of tasks, you can add new automated or data entry task types. See Adding a New Task Type for instructions.



See Setting Up Service Request Processes for more information, including how to manage task categories, tasks, and service request templates.



Step 5: Import existing data

You can migrate data into Connected Servicing from other systems that your organization is using. This process is generally very unique and has its own nuances that depend on many factors.

Migrating Data provides the general steps to move customers, documents, accounts, and products into Connected Servicing.

Step 6: Internationalize display text (optional)

If your organization requires it, you can translate all of the text displayed in interfaces into multiple other languages using bundle files and reference data.

Before you begin, you will need translations for all of the text displayed in the UI.

See Adding a new language on the Modifying UI Text page for instructions on how to internationalize your application.

Internationalizing the Connected Servicing application includes:

- Modifying UI Text
- Modifying Dropdown Lists

Step 7: Set up web APIs and integrations (optional)

After you complete the initial set up of the application, you may want to take advantage of the various capabilities to extend the Connected Servicing application.

You can use web APIs and integrations to automatically complete tasks, classify documents, and pull in customer information.

Configure integrations

Several integrations are available to be used throughout Connected Servicing. These integrations need some initial prerequisite set up and minimal configuration in the **System Administration Center** in order to be used. Using these integrations is completely optional.

The available integrations are:

- Companies House
- Dun and Bradstreet
- Intelligent Document Processing (IDP)
- Northrow

Step 8: Configure auditing for new fields (optional)

After setting up your initial CDTs, you may want to go back and track specific fields. You can use auditing to automatically configure this in your application.

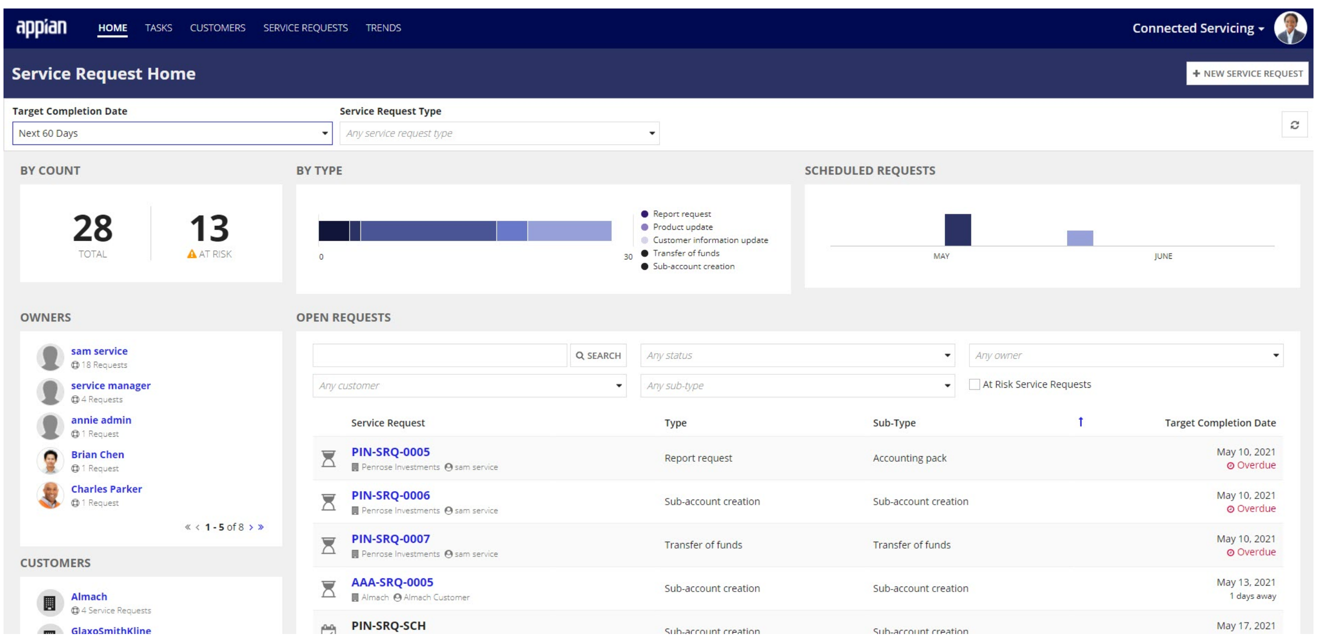
Home Page Overview

Introduction

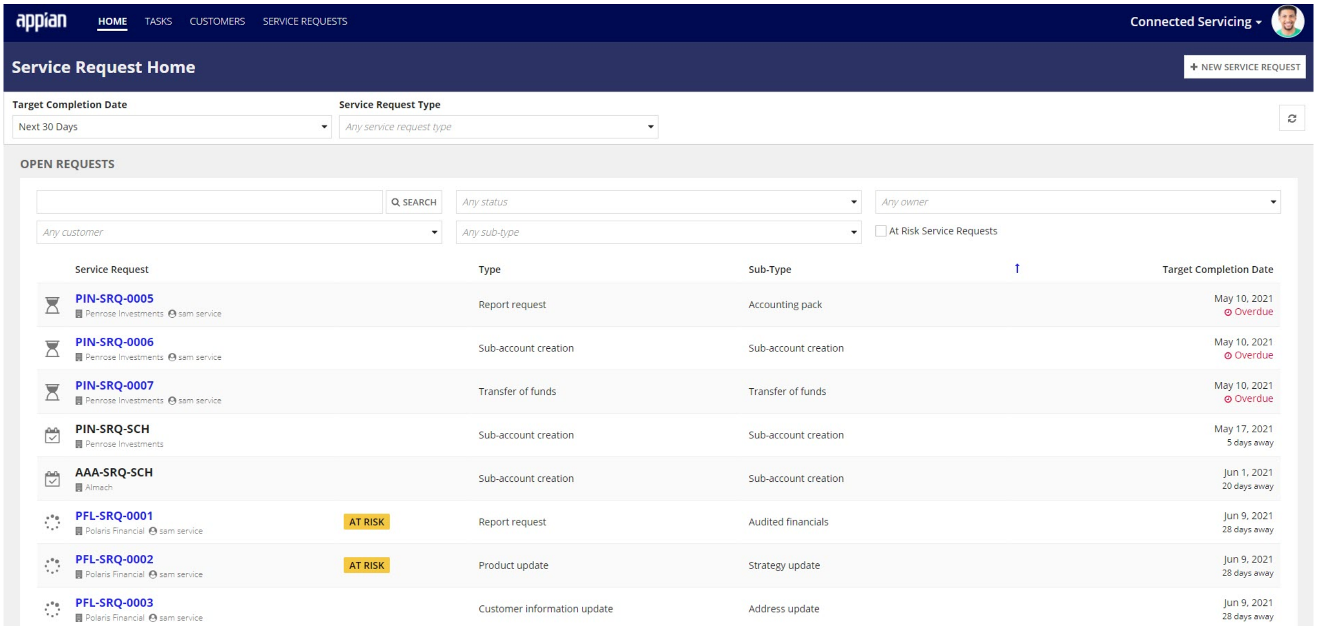
The Connected Servicing Home page is the primary page to complete tasks and track service requests. For department heads, it is an invaluable tool to keep track of service requests at a high-level and identify issues. For other users, it is their home for keeping on top of their tasks.

The Home page for department heads and other users displays slightly different information. This page gives an overview of the Home page and also describes the differences between what each user sees.

A department head user will see:



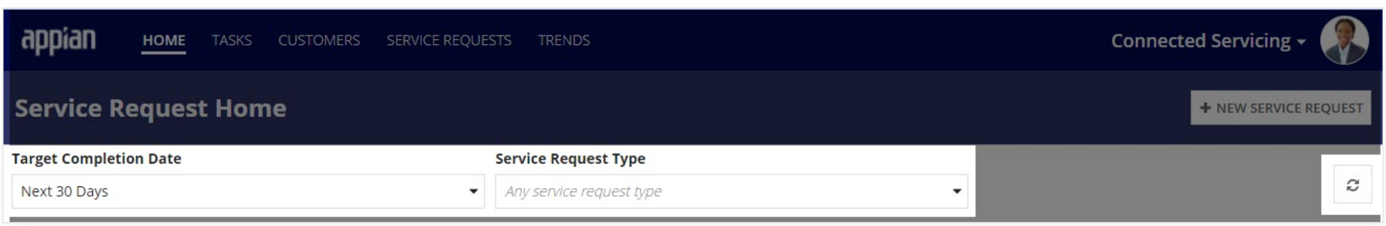
A non-department head user will see:



Dashboard metrics

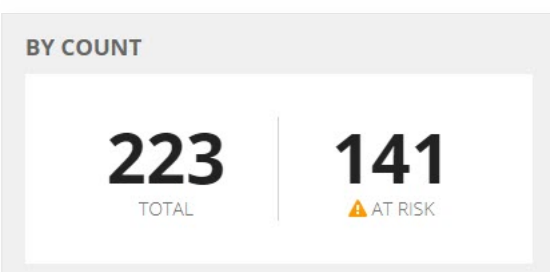
The dashboard metrics cards are visible for managers to see what is going on in their organization at a glance. The managers will have insights into customers, requests, tasks and owners in order to appropriately workload balance to ensure service requests are moving as smoothly as possible.

You can change the entire home page by choosing how much data to see or using the filter for type in the upper left hand corner. The refresh button will allow the user to ensure that the data is the most up to date as other users may be using the system. These filters and the refresh button will change all of the data seen on the page.



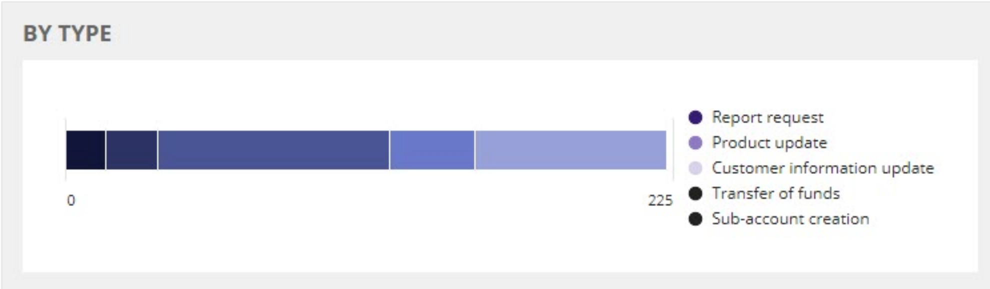
Service requests by count

The **BY COUNT** profile card gives the manager information on how many service requests are currently and how many of those service requests are at risk of not being completed by the target completion date.



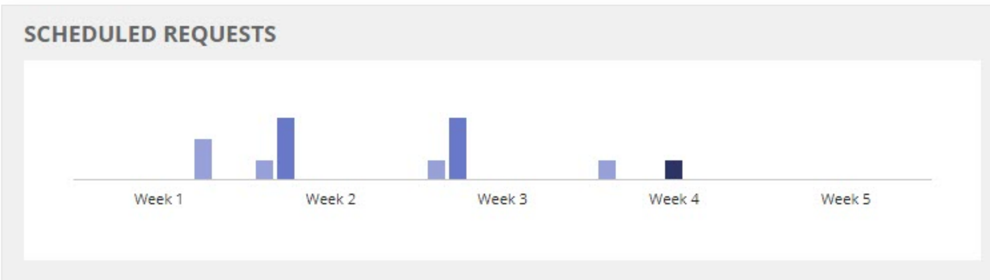
Service requests by type

The service request by type chart gives the manager information on open service requests grouped by type. The manager can hover over each section to see the total number of service requests by type.



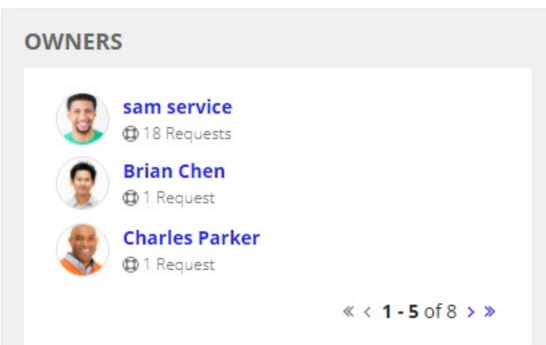
Scheduled requests

The scheduled requests chart gives the manager information on service requests that are upcoming. The scheduled request chart will update based on the time filter the user selects to show by week or by month.



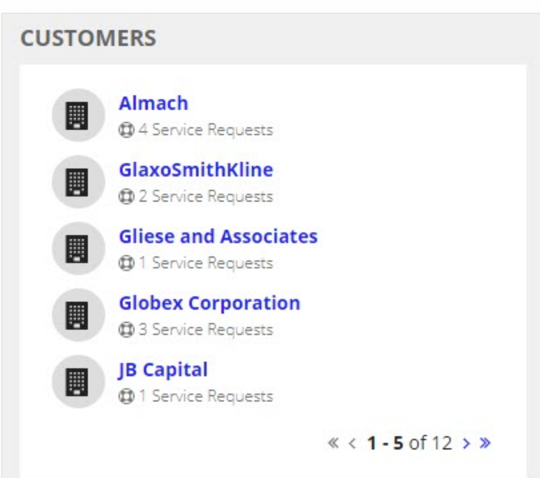
Owners

The owners card gives the manager information on which users are primary owners of service requests and how many service requests are assigned to them.



Customers

The customers card gives the manager information on which customers have open service requests and how many requests are open for each of those customers.



Who sees what?

Department heads:

- Dashboard metrics
- Home page filters

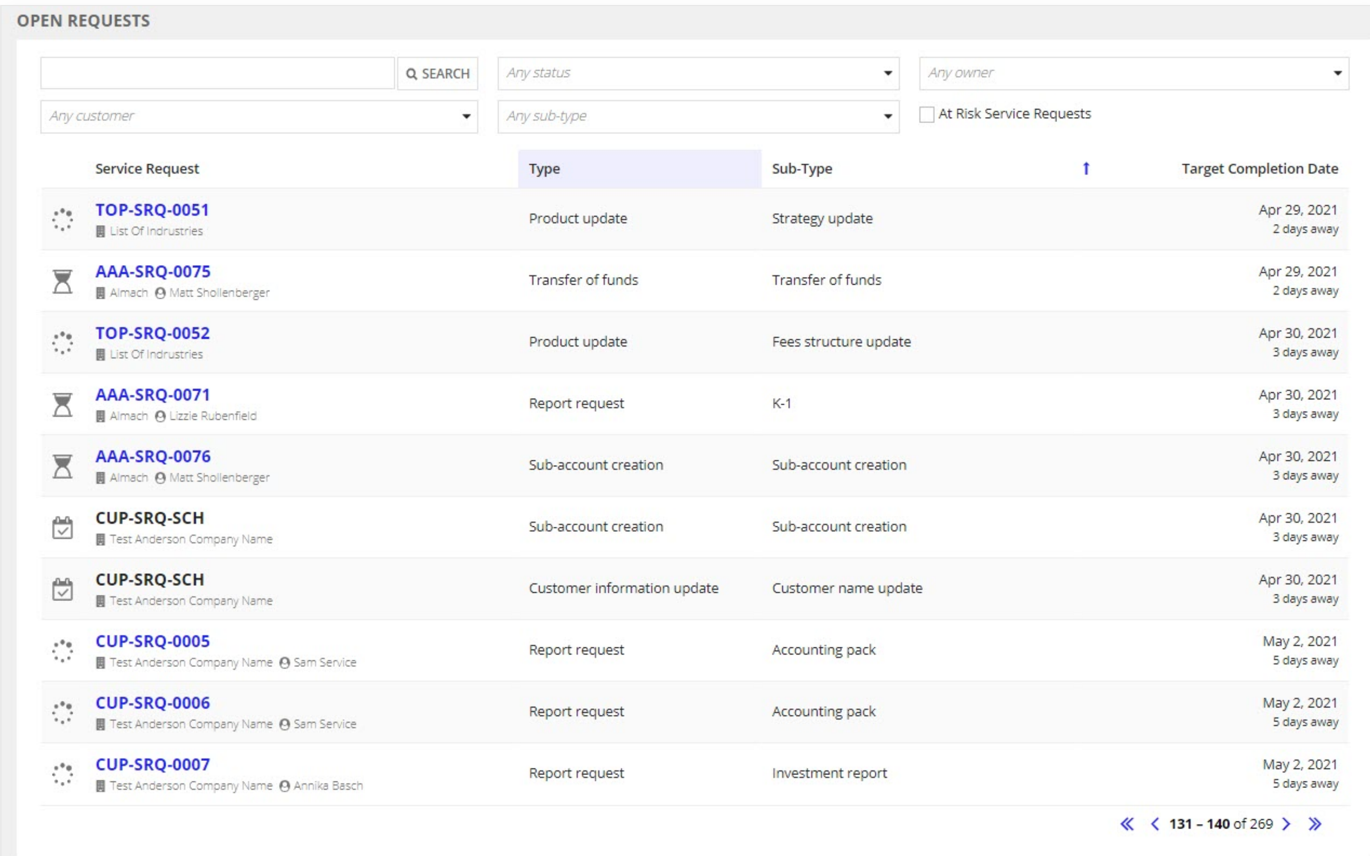
All other users:

- Home page filters

Open requests

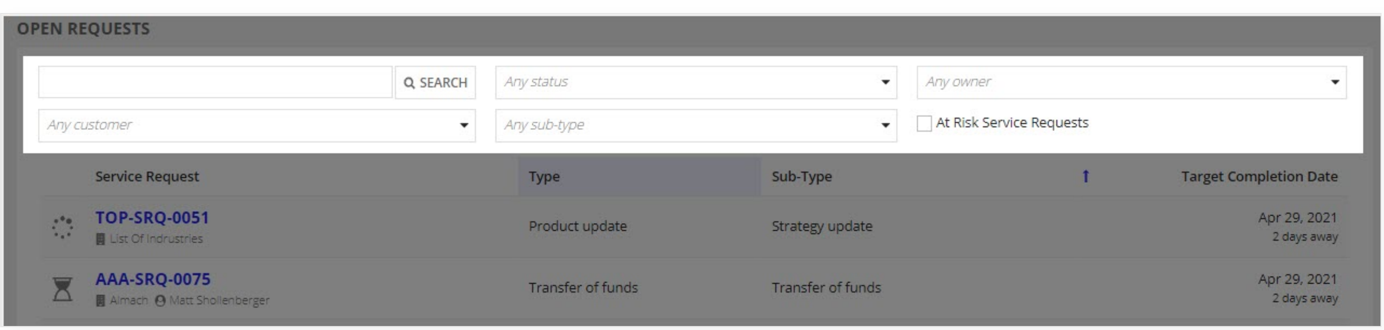
The **OPEN REQUESTS** grid, a list of all open and scheduled service requests displays. If a service requests is at risk is determined by a number of factors,which include:

- If any of the service request's tasks are overdue.
- If a task required before the target completion date is due after the target completion date.
- The target completion date has passed.



Open service requests include those in the statuses of Pending and Active. See the service request status lifecycle for more information on statuses.

Select **At Risk Service Requests** to see only service request that have been tagged as at-risk. You can also filter the list by **Status**, **Owner(s)**, **Customer**, and **Subtype**.



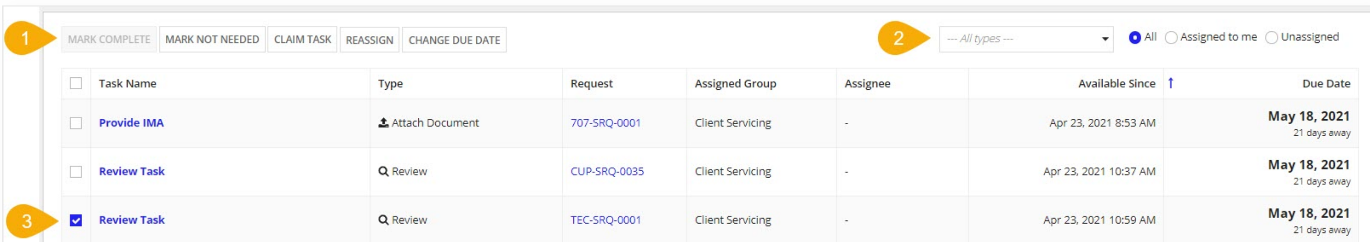
Clicking a service request name opens the service request summary page.

Tasks

For non-manager users, the home page will show the task list. For manager users, there will be an extra tab for the task grid at the top of the page.

The following actions are available in the task list:

1. Complete actions for selected tasks including: **REASSIGN**, **MARK NOT NEEDED** or **CLAIM TASK**. For Confirmation tasks, you can also select **MARK COMPLETE**. For individual tasks, you can also select **CHANGE DUE DATE**.
2. Filter the list by **All**, **Assigned to Me**, or **Unassigned**.
3. Click a task name to perform the required action.



Who sees what?

Department heads:

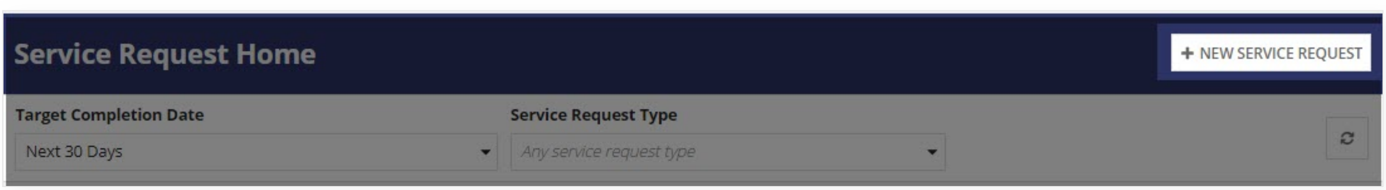
- All tasks, regardless of department or assignment.

All other users:

- Tasks that are assigned to them.
- Tasks that are assigned to their team, but not have not been picked up by a team member.

Create a new service request

You can start a new service request directly from the homepage.



Creating a new service request walks you through the process of entering the information needed to start the process.

See Create New Service Request for more information.

Who sees what?

By default, only members of the `Client Servicing` and `Sales` groups see the **New Service Request** action. See the Groups Reference Page for more information about groups in Connected Service Request.

Create New Service Request

Introduction

Client servicing is the process of fulfilling customer requests. This can include updating customer data or providing an ad-hoc report for a customer. The Connected Servicing solution provides a guided experience for collecting and updating this information. Enabled by Appian Records, end users can view and update this information from simple, informative record interfaces after creating a service request.

This page provides instructions for creating a new service request.

Creating a new service request

Creating a new service request walks you through the process of entering the information needed to start the service request process. The information entered here will populate the Service Request record, as well as determine which service request process template will be used to complete the request.

The guided experience for creating a new service request walks you through the process of entering the information you need to start the service request process. It consists of the following guided steps:

1. Choose a customer.
2. Provide service request details.
3. Provide required documents.
4. Review service request.

You can customize these steps and the fields that display in each form. See How to Configure Connected Servicing for more details on how to customize the application.

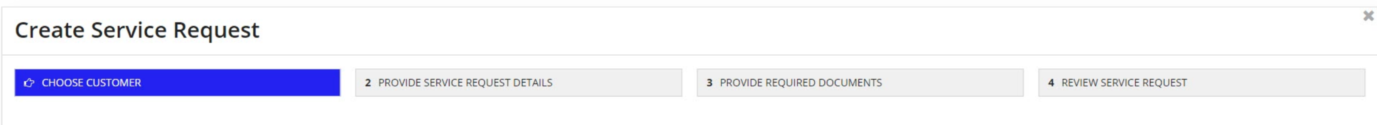
Beginning a service request

Starting a new service request will start the data collection process. In order to start a new service request, you must be a member of the **AS SRQ Create Service Request** security group. By default, the **Client Servicing** and **Client Servicing Department Heads** groups belong to this security group.

To start a new service request:

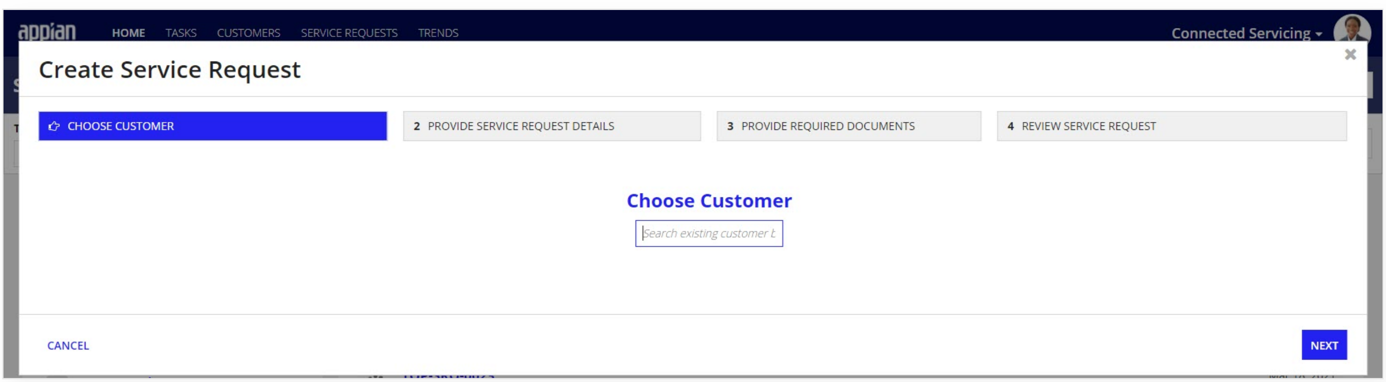
- From either the **HOME** or **SERVICE REQUEST** page, click **+ NEW SERVICE REQUEST**.

The top of the screen contains the various data collection steps required to create a new service request. You can click **NEXT** at the bottom of the form to go to the next step.



Choose a customer

When creating a new service request, the first step is to identify the customer you're creating the request for. In order to to locate the customer, they must already be created in the system.



To choose a customer:

1. In the **Choose a Customer** field, search for the existing customer by name or acronym.
2. Select the customer that you want to create the request for.

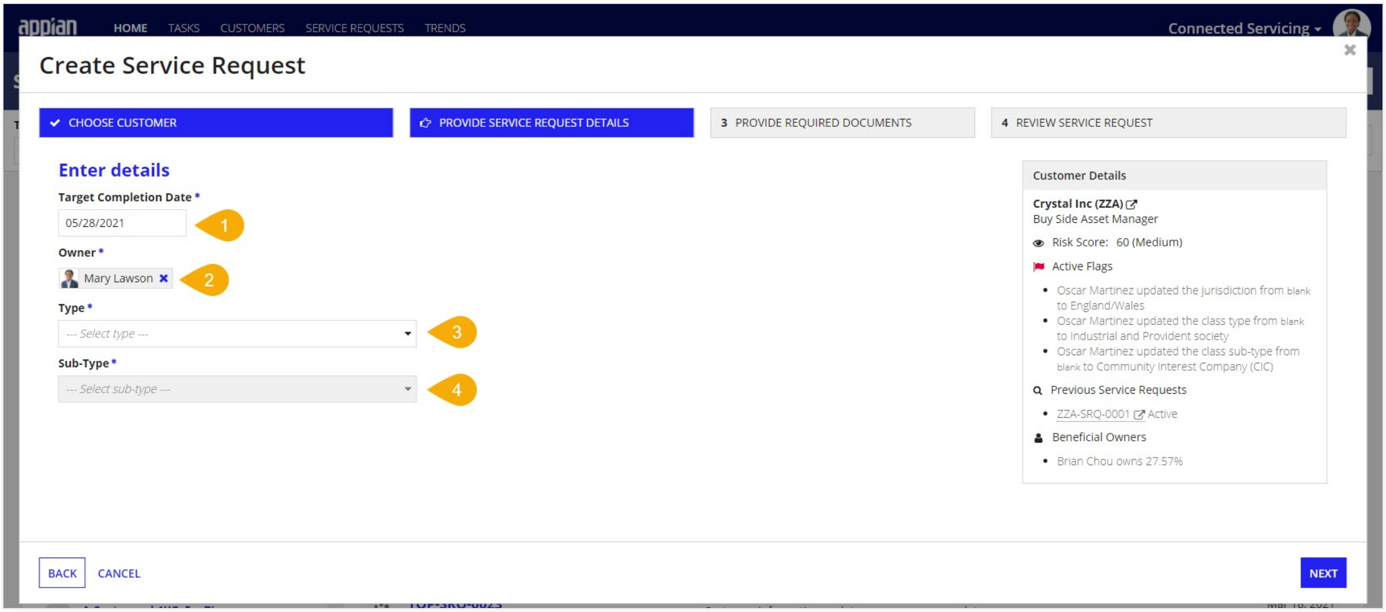
The customer is a required field and you will not be able to move forward through the form without selecting one. The information for the selected customer will auto populate in the remaining steps.

Provide service request details

The **Provide Service Request Details** page is where you specify relevant information to the request.

To provide service request details:

1. Enter a **Target Completion Date** for the request.
    - **Note:** The target completion date will be used to determine task due dates.
2. Select an **Owner** for the request.
    - This user will be come the primary owner of the service request.
3. Select a **Type**.
4. Select a corresponding **Sub-type**.
    - Depending on the **Type** and **Sub-type**, enter any additional information needed for the request.
    - Example: If the type selected is **Customer information update** and the sub-type is **Contact update**, you will need to enter the updated contact information. - **Note:** The type and sub-type selected are are used to determine which process template is selected for the request. See Modifying Service Request Process Selection Attributes for information on how to update these values.

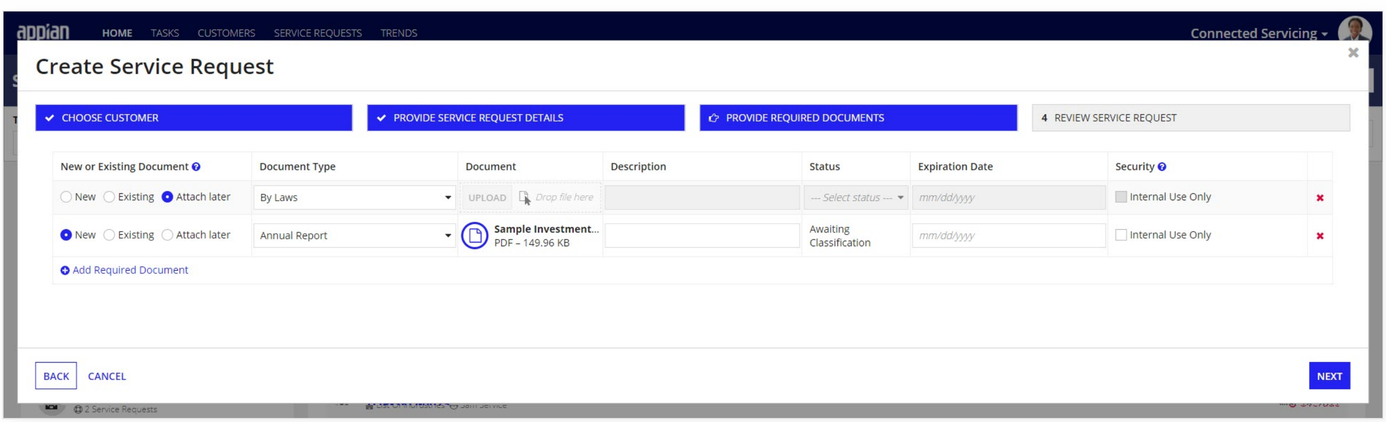


Provide required documents

The **Provide Required Documents** step is used to keep track of the documents needed to complete the request.

To add required documents:

1. Click **Add Required Document**.
2. Select if the document is **New**, **Existing**, or if you are going to **Attach Later**.
3. If you select **Attach Later**, a document upload task will be created for each required document that is created at this time.
4. Select the **Document Type**.
5. If the document is **New**, click **UPLOAD** and select the document to upload.
6. If the document is **Existing**, select the **document type** and click the document you want to attach from the dropdown list.
7. (Optional) Enter a **Description** for the document.
8. (Optional) In the **Expiration Date** field, enter the date that the document expires.
9. (Optional) Mark if the document should be for **Internal Use Only**.
    - If a document is marked as **Internal Use Only**, the document will not be available for customers to view in the **Customer Portal**.



If you attach a document, its **Status** is automatically set to **Awaiting Classification**. To learn how you can manually update this status, see Managing Documents.

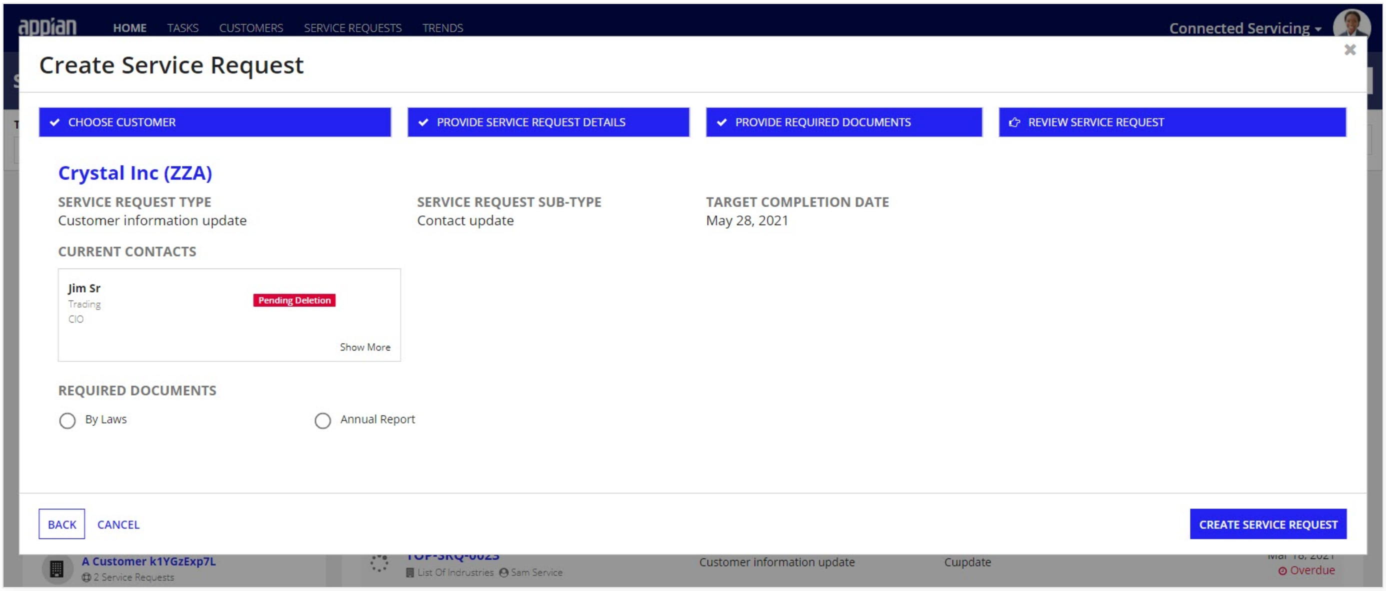
If a required document is not needed, click the red **X** to remove it from the list.

Review and submit service request

On the final **REVIEW** step of the process, a summary of all of the information entered for the service request displays.

1. Review the information for accuracy.
2. When you are ready, click **CREATE SERVICE REQUEST** to finish creating the new service request.

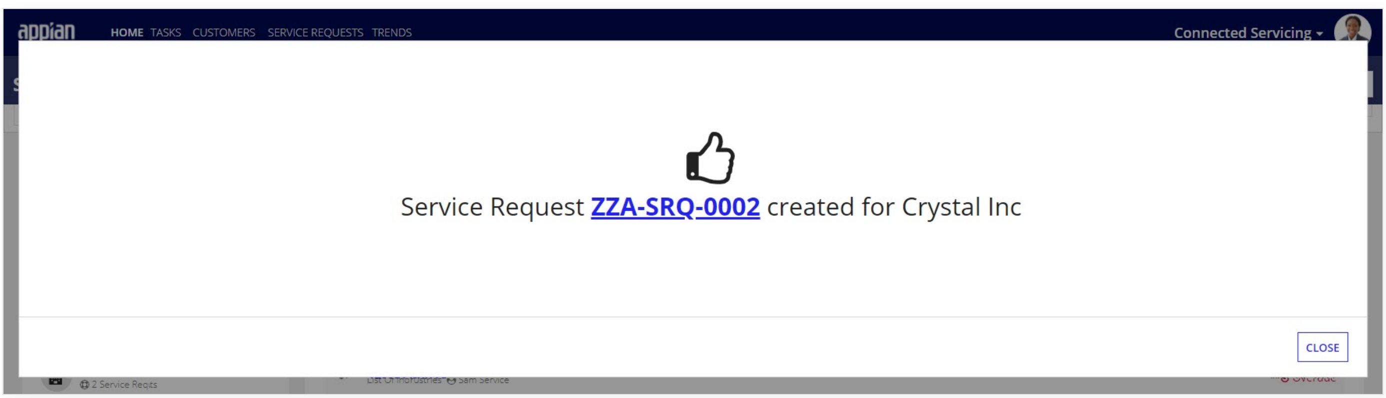
If you need to change any information, click **BACK** button or click on any of the blue milestone steps at the top.



Each individual page is configured with validations, so you will be unable to move forward to the next page without completing the errors on that page.

Confirm service request

Once you have created a service request, a confirmation displays with a link to the newly created service request record link.



From here, you can immediately go to the new service request or close out to monitor the request another time.

Viewing Service Requests

Introduction

After you have created a new service request in Appian Connected Servicing, you will need to view and maintain that information. Enabled by Appian's powerful records, after a request is created, end users can view and maintain this information from simple, informative record interfaces. See Using Records for more information on records in Appian.

This page provides a description of information available in the service request lists and the tabs of a service request record.

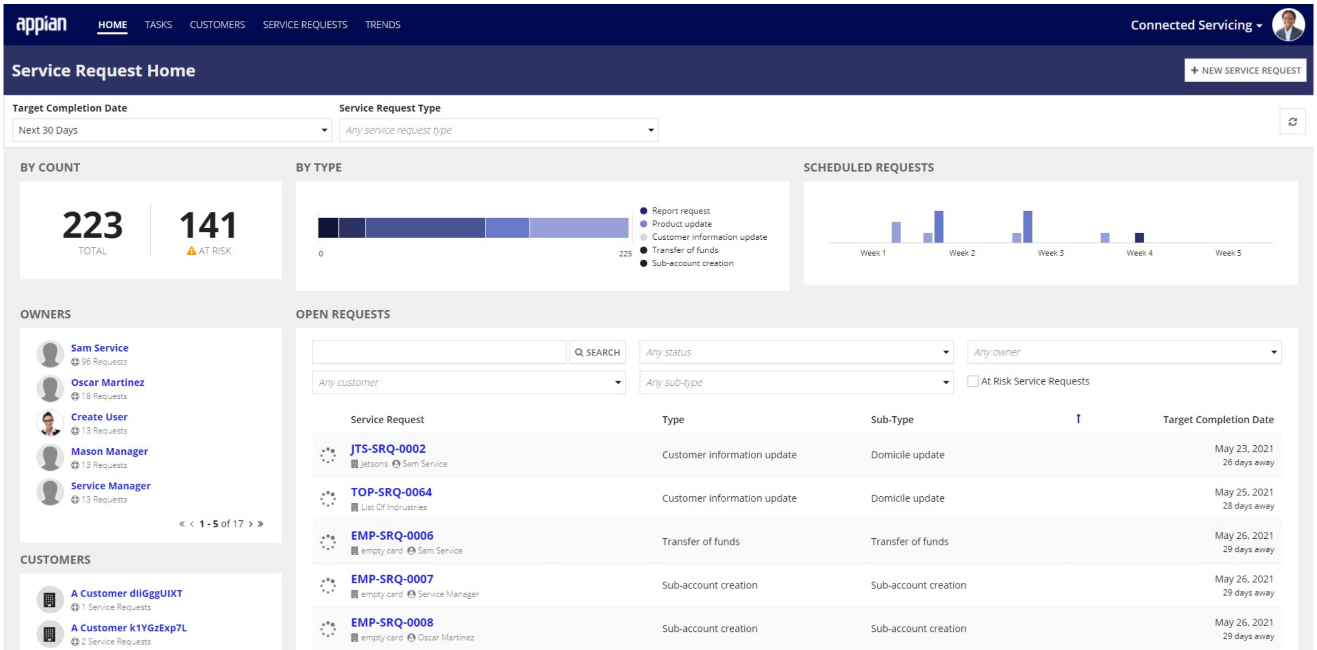
See also

- Create New Service Request describes how to create a new service request.
- Updating Service Requests explains how to update the information for a service request.

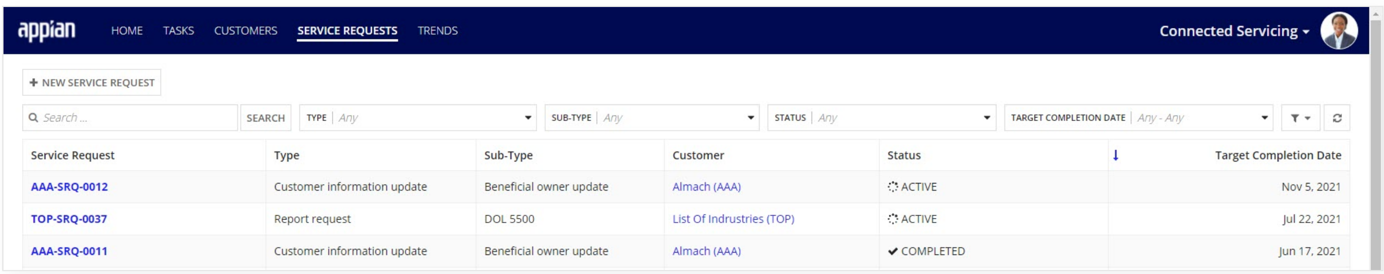
Service request lists

There are two main pages that show a list of service requests, the **HOME** page and the **SERVICE REQUESTS** page.

From the **HOME** page, when **Service Requests** is selected, a list of open, at-risk service requests displays. This view is intended to show service requests that may need the attention of the logged in viewer. See Home Page Overview for more information about the information available on the Connected Servicing Home page.



Clicking **SERVICE REQUESTS** at the top of the screen displays a list of service request records. This view is intended to show all service requests. You can search the list, as well as filter it by **Type**, **Sub-type**, **Status**, and **Target Completion Date**.



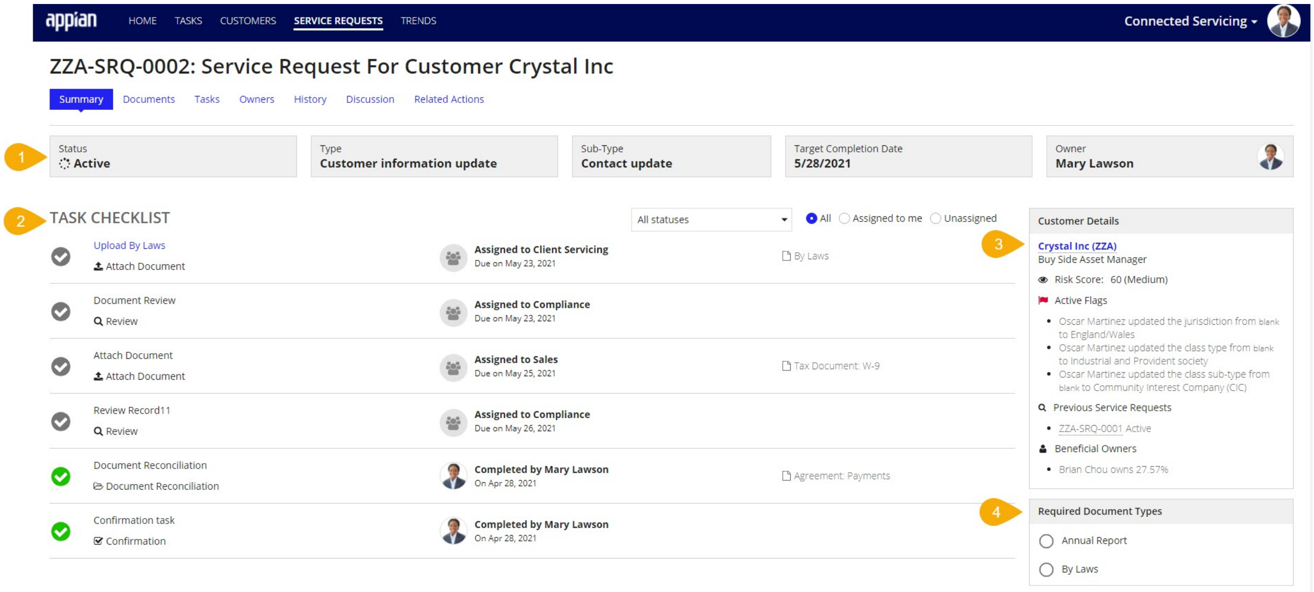
On both lists, clicking a service request name displays the record for that service request. The record displays all of the pertinent information for a particular service request. This information is split into several different tabs, which are outlined in the following sections.

Summary tab

The **Summary** tab lists the important information about a service request.

The following service request information is listed on this page:

1. **Service Request Highlights** - This section lists helpful information about a service request, including:
    - **Status**
    - **Type**
    - **Sub-type**
    - **Target Completion Date**
        - Service Requests at risk of missing their estimated funding date will have an at risk icon displayed.
    - **Owner**
2. **Task Checklist** - A list of the tasks display in the center of the page. You can filter the list, bulk select tasks to perform actions on them, and open tasks to complete them.
    - See Home Page Overview for more information on working with tasks.
3. **Customer Details** - This section lists the specifics of the customer including any open flags.
4. **Required Document Types** - If the service request has documents that are required, they display below the tasks. A status icon shows if they are outstanding or accepted. To download a document, click the document link.
    - See Upload document and Update document status on the managing documents page for more information on working with documents.



Documents tab

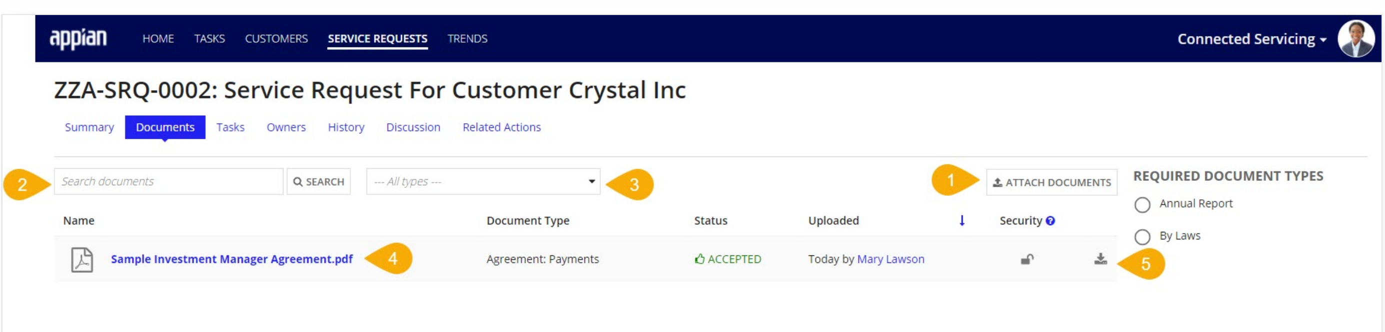
The **Documents** tab lists all of the documents related to a service request. You can see the status of your attached documents. The possible statuses for a document are:

- Accepted: a document has been accurately classified by IDP or a user and the type confidence is above the confidence level threshold.
    - **Note:** this status can be updated manually by a user.
- Rejected: a document has not been classified by IDP or the type confidence is below the confidence level threshold.
    - **Note:** this status can be updated manually by a user.
- Awaiting Classification: a document is waiting to be classified by IDP.
    - **Note:** the default status when documents are uploaded and IDP is enabled.
    - **Note:** this status is only available when IDP is enabled.
- Submitted: a document is waiting for the status to be updated manually by a user.
    - **Note:** the default status when documents are uploaded and IDP is enabled.
    - **Note:** this status is only available when IDP is disabled. You can learn more about updating a document's status on the Managing Documents page.

Document list

On this page you can:

1. Attach a document.
2. Search for a particular document by name.
3. Filter by document type.
4. Review the **Required Document Types** and their status.
5. Preview uploaded documents.
    - Click the document link to preview uploaded documents, view details about them, and update their status.
6. Download uploaded documents.



Document preview

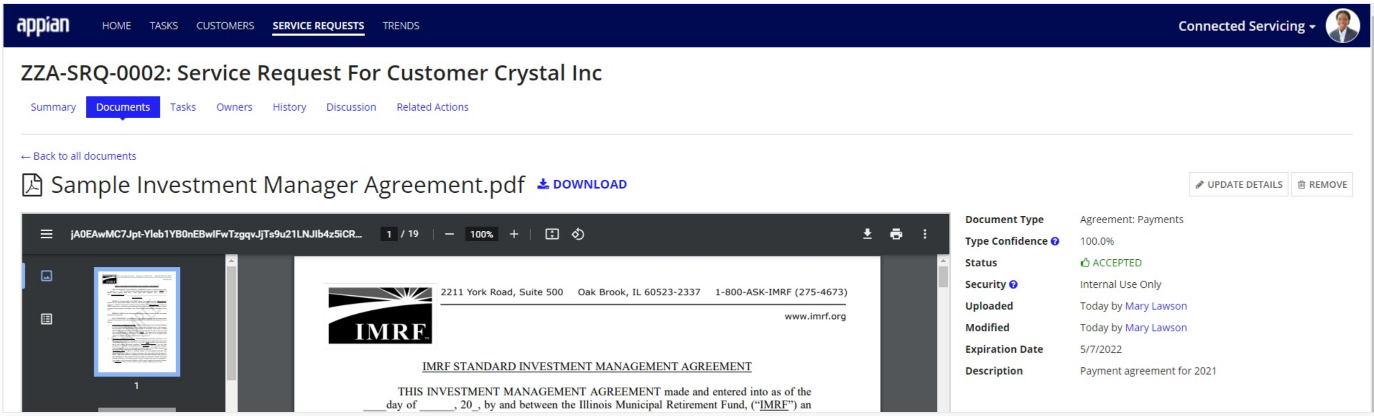
When you click a document's name in the document list, a preview of that document displays and shows:

- Document type.
- Type confidence.
    - **NOTE:** this field will only be displayed when Intelligent Document Processing (IDP) is enabled.
- Status of the document.
- Security of the document.

- When the document was uploaded and who uploaded it.
- When the document was last modified and who modified it.
- When the document expires.
- A description of the document.

You can also download the document from this page.

Additionally, you can update the document's details, including the **Document Type**, **Status**, **Security**, **Expiration Date**, and **Description**. You can learn more about updating a document's details on the Managing Documents page. Updated document details will display in the document list or the document details page.

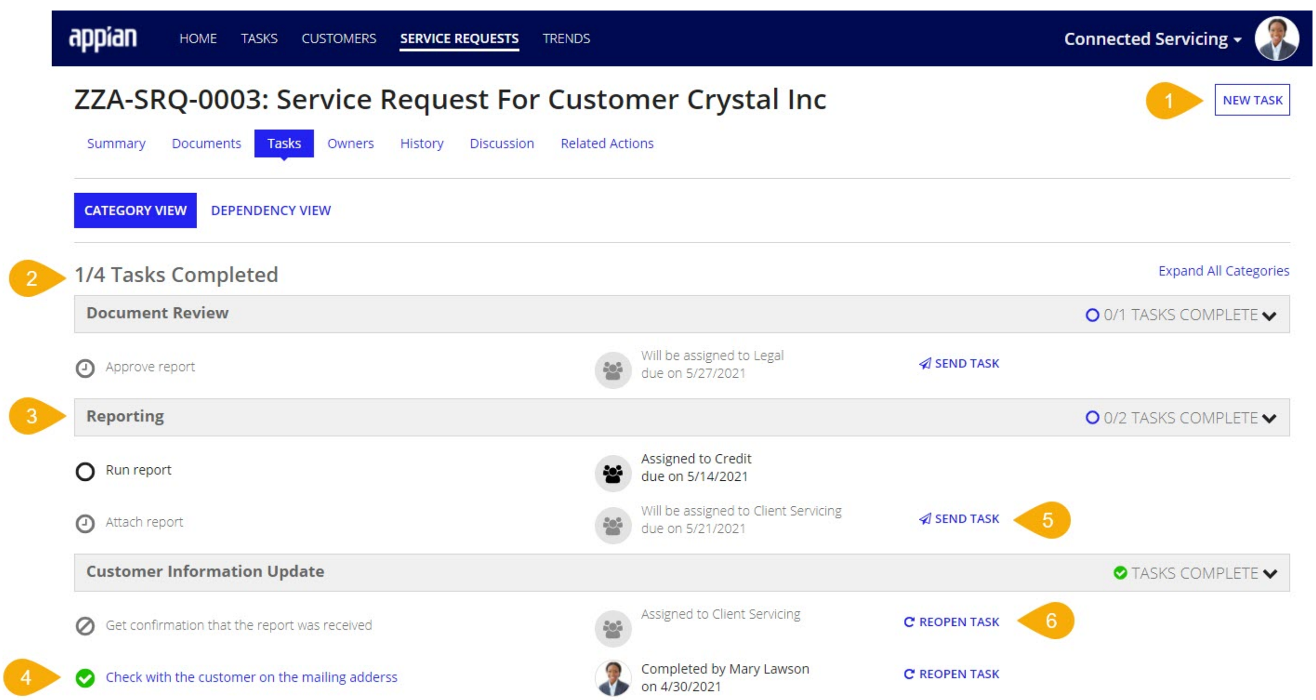


Tasks tab

The **Tasks** tab lists all of the tasks for a service request.

On this page you can:

1. Add a new task.
2. View all tasks and see how many outstanding tasks remain for that service request.
3. View tasks by task type, which you can expand or collapse.
4. View a task's status.
5. Send out a queued task to be kicked off.
6. Reopen a closed task.



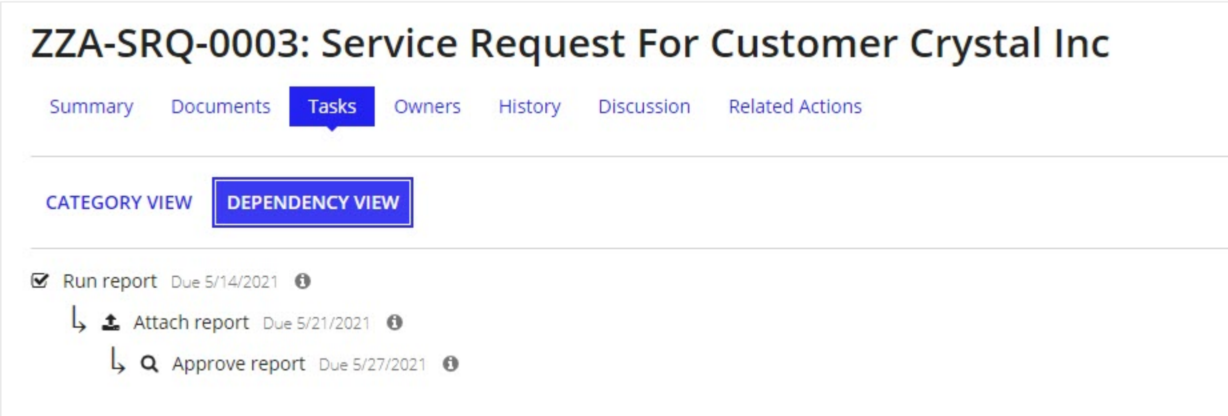
For tasks that are queued, you can kick them off without completing their precedent tasks by clicking the blue paper plane send task icon SEND TASK . This will bypass any precedents and assign the task to the default group.

You can resend **Completed** and **Not Needed** tasks by clicking the blue reopen task icon REOPEN TASK .

Dependency view

You can also view tasks from the **DEPENDENCY VIEW** on the tasks tab.

The tasks are displayed so that a user can see a specific open task and all of its dependent tasks in a cascading list.



Task status

See the following table for information on the icon that displays for each task status.

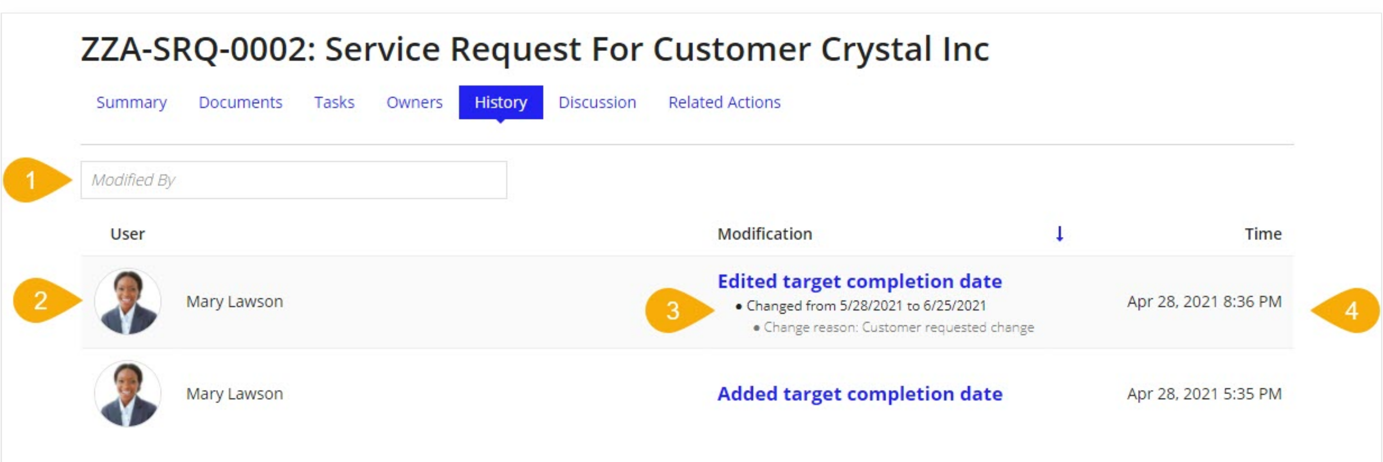
Status	Icon	Related Actions
Assigned		-
Queued		Bypass precedents to kick off task. SEND TASK
Completed		Reopen task. REOPEN TASK
Not Needed		Reopen task. REOPEN TASK

History tab

The History tab shows the actions that have been taken on the tasks for a service request. This information acts as an audit trail for tasks.

On this page you can:

1. Search the history by user.
2. View the user who changed the service request data.
3. View details about the modification made.
4. View the date and time the modification was made.

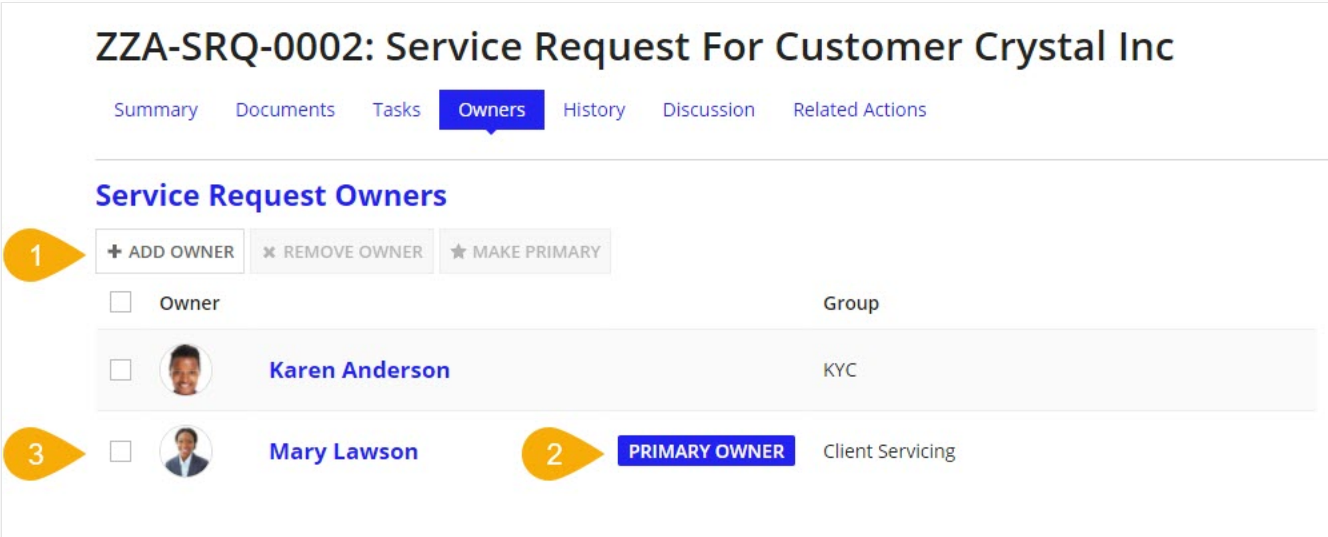


Owners tab

The **Owners** tab displays the owners of a service request. See Update service request owner for instructions on how to edit this information.

On this page you can:

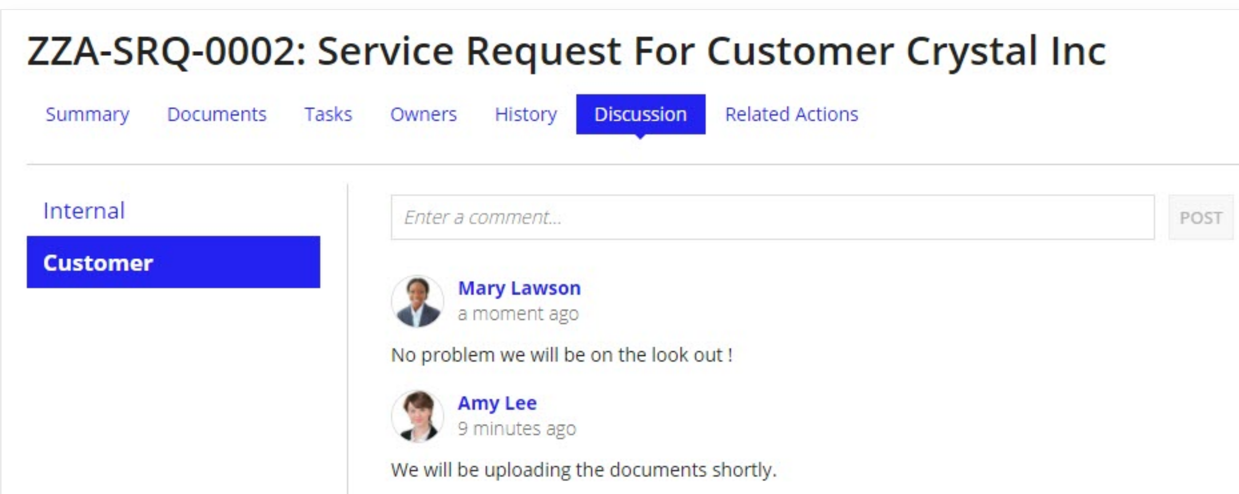
1. Add owners, remove owners, or make primary owners.
2. View the primary owner of the service request.
3. Select an owner to remove or make primary.



Discussion tab

For open service requests, you can add a comment to a service request on the **DISCUSSION** tab.

There are two types of discussion threads: internal and external. Internal discussion will not be visible on the customer portal and therefore, not able to be viewed by customers. Customer discussion will be available on the customer portal and able to be viewed and responded to by customers.



To add a discussion post:

1. On the **DISCUSSION** tab, select **Internal** or **Customer**.
2. Enter a comment.
3. Click **POST**.

Updating Service Requests

Introduction

After you have created a new service request in Appian Connected Servicing, you will need to view and maintain that information. Enabled by Appian's powerful records, after a service request is created, end users can view and maintain this information from simple, informative record interfaces. See Using records for more information on records in Appian.

This page provides instructions for updating service requests. If you haven't reviewed the information about creating a service request, you might want to start at the Create new service request page.

Service requests are updated throughout the service request process by users completing tasks. These updates can usually be made through the task itself. However, there are also various ways to update a service request from the service request record. These include:

- Updating a target completion date.
- Updating service request owners.
- Updating discussions.
- Canceling or completing a service request.

You can also add custom tasks and update documents.

The actions related to updating a service request are controlled by business and security groups. Because of this, not all users will see the same related actions. See Actions users can perform based on their group membership on the Groups Reference Page for an explanation of which groups control access to these actions.

Service request status lifecycle

A service request goes through several statuses throughout its life cycle, defined by certain events.

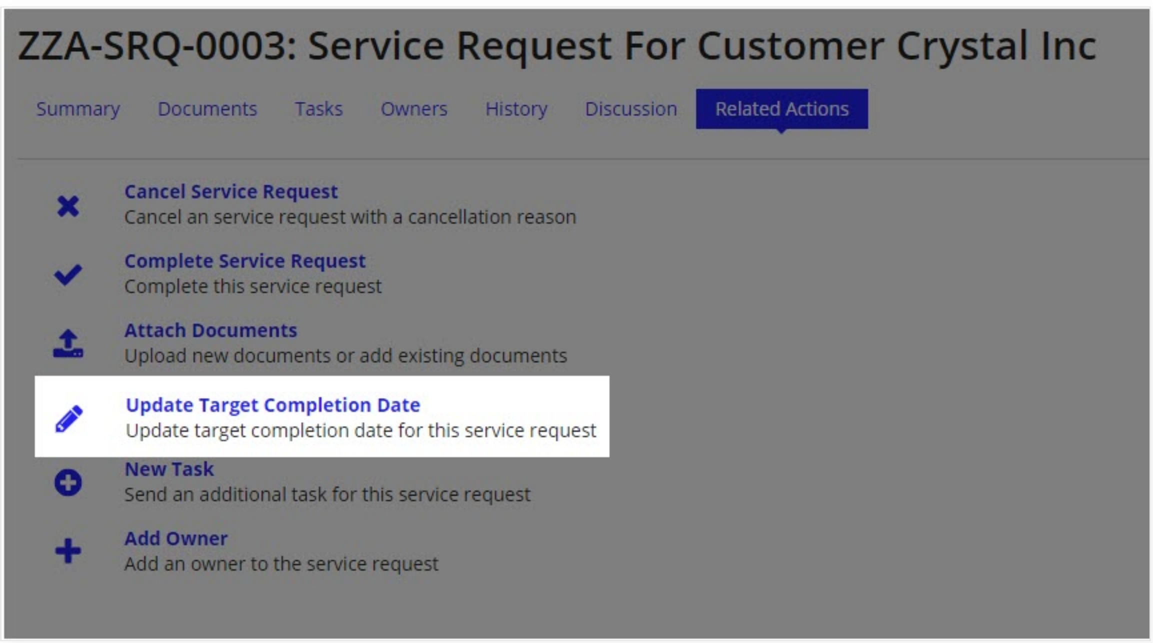
The events and statuses are:

- If a user schedules a service request for a customer, it will appear as **Scheduled**.
- After a scheduled service request is kicked off automatically, the status is set to **Pending**.
- If a user directly creates a service request or completes the Confirm Service Request Details task, the status updates to **Active**.
- If a user completes the Cancel related action, the status updates to **Canceled**.
- After a user completes the Complete related action, the status updates to **Complete**.

Update target completion date

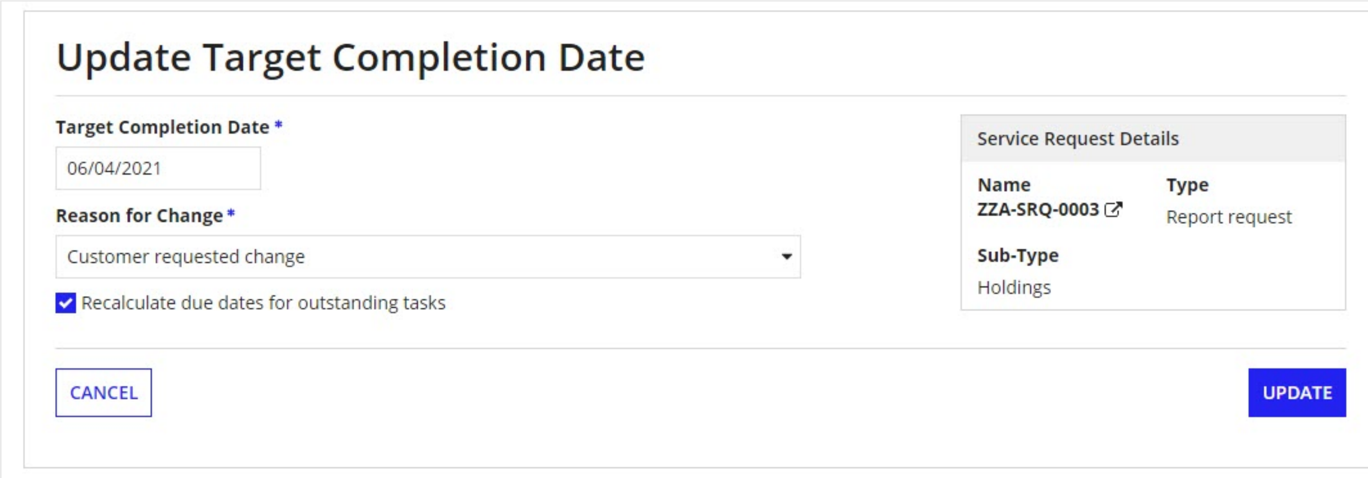
For Pending or Active service requests, the target completion date that was entered during creation can be updated.

The target completion date can be updated from the **Related Actions** tab of the service request record.



To update the target completion date for a service request:

1. Update the **Target Completion Date**.
2. Provide a **Reason for Change** from the dropdown.
3. (Optional) Recalculate due dates for outstanding tasks.
    - All current task due dates shift accordingly with the new target completion date date.
4. Click **UPDATE**.

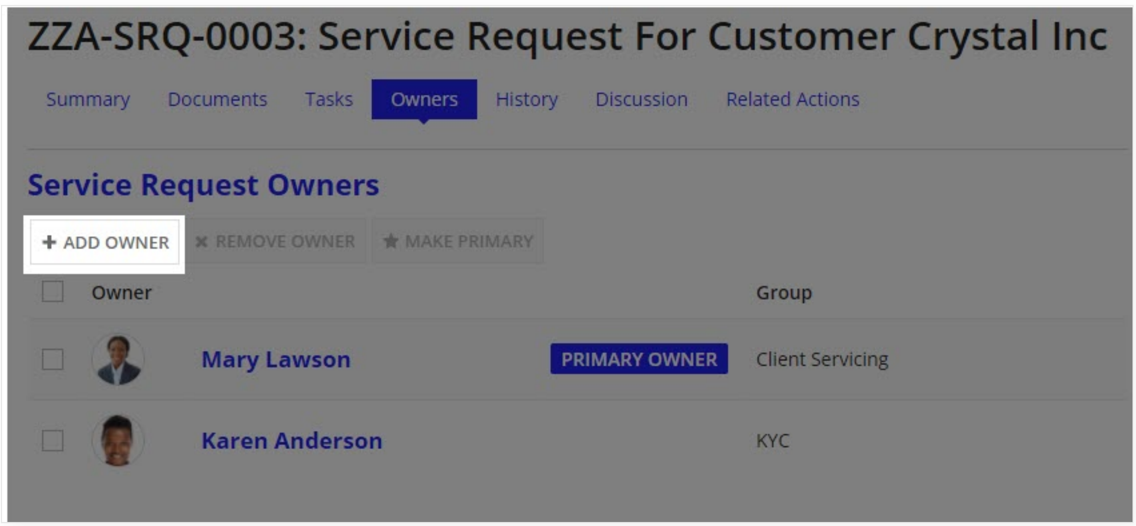


Update service request owner

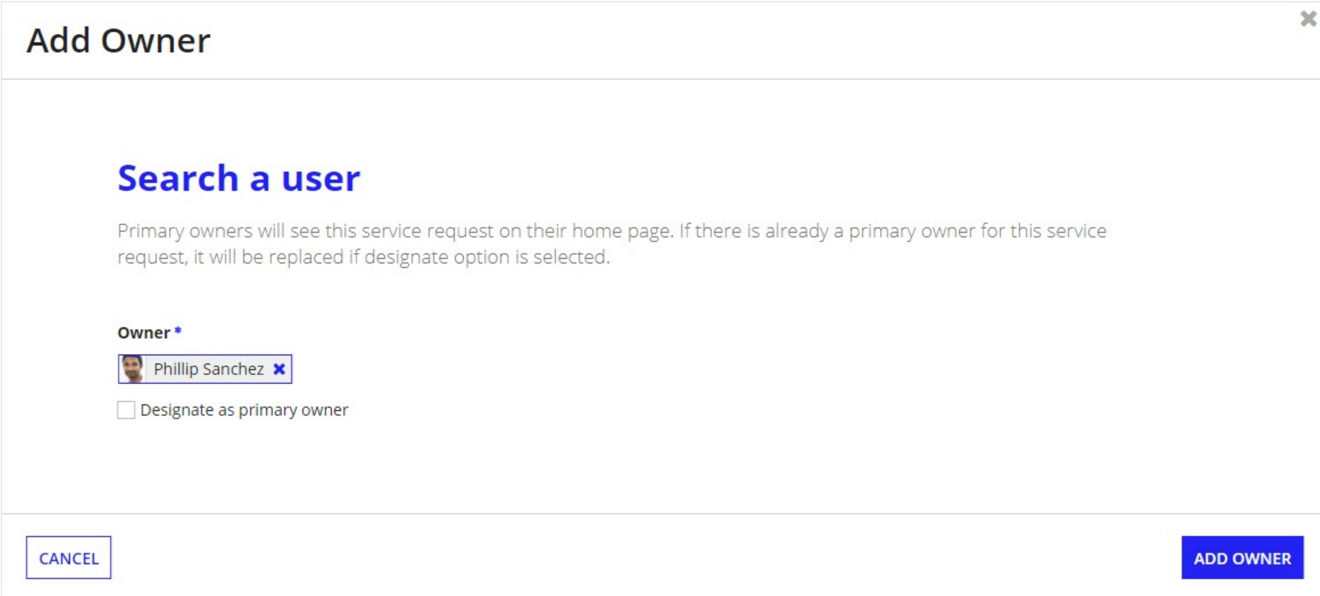
For Pending and Active service requests, you can add, remove, and make primary service request owners in the **Owners** tab.

To add a new owner:

1. In the **Owners** tab, click **Add Owner**.



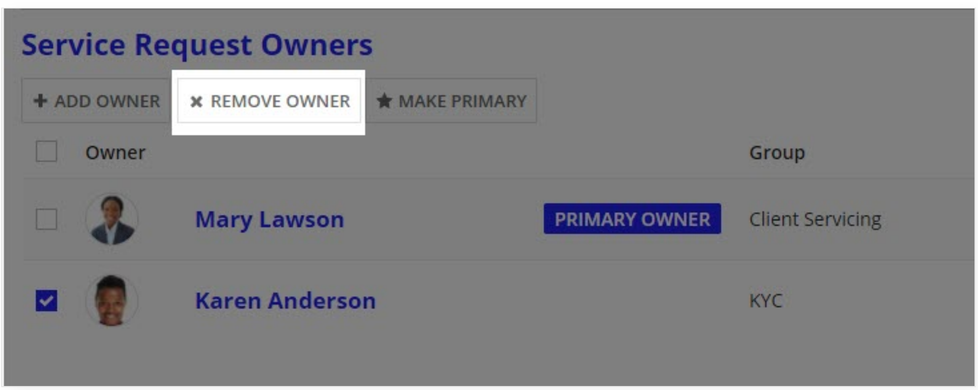
2. Use the picker to select the user that you are assigning as owner.
3. (Optional) Designate the user as a primary owner.
    - **Note:** A primary owner oversees all tasks associated with that service request. You can make an owner a primary owner in two ways. If there is already a primary owner for a service request, they will be replaced by the new primary owner. The primary owner is defaulted to the user who created the service request.



4. If you need to add more than one owner, click **Add Owner** again.

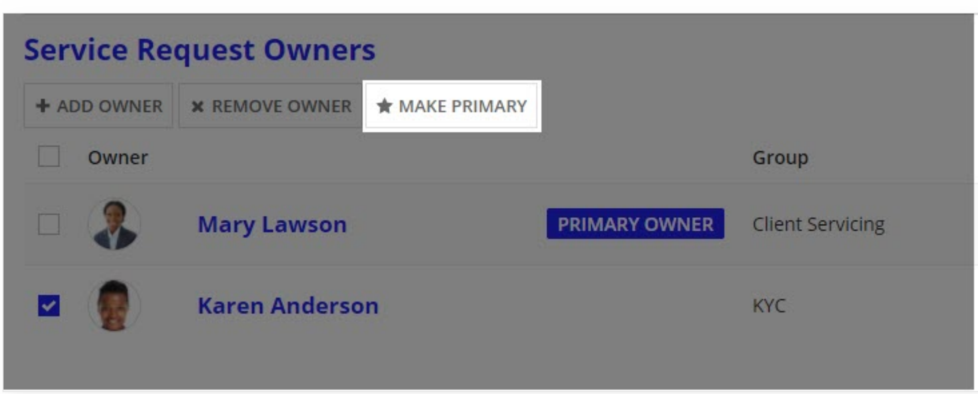
To remove an owner:

1. In the **Owners** tab, select the checkbox next to the owner you would like to remove.
2. Click **REMOVE OWNER**.



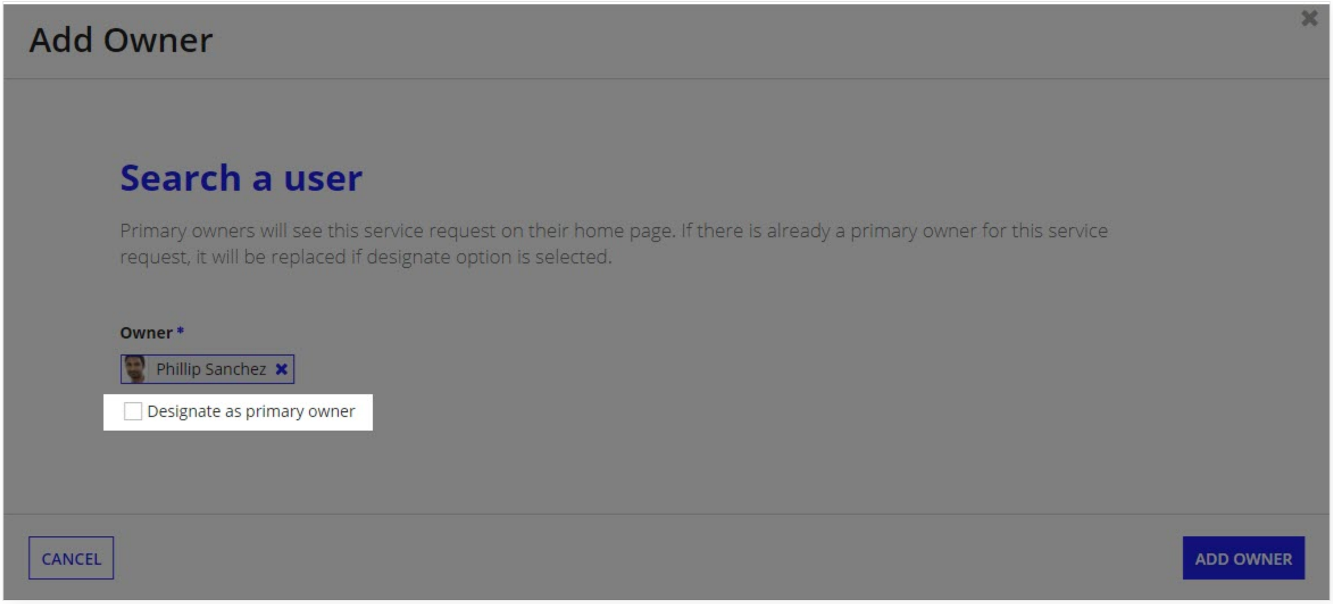
To make an owner the primary owner:

1. If the owner is already added, select the checkbox next to the owner you want to make a primary owner.
2. Click **MAKE PRIMARY**.



3. If the owner is new, on the **Owners** tab, click **Add Owner**.
4. Use the picker to select the user that you are assigning as owner.

5. Select the checkbox to designate the user as a primary owner.



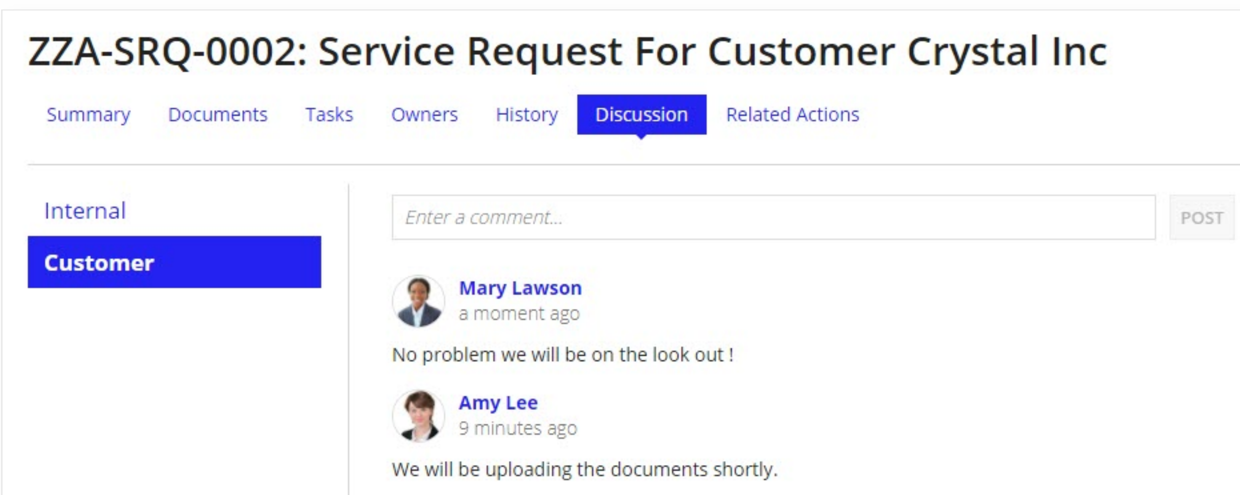
Update service request discussion

For Pending and Active service requests, you can add a comment to a service request on the **DISCUSSION** tab.

There are two types of discussion threads: internal and external. Internal discussion will not be visible on the customer portal and therefore, not able to be viewed by customers. Customer discussion will be available on the customer portal and able to be viewed and responded to by customers.

To add a discussion post:

1. On the **DISCUSSION** tab, select **Internal** or **Customer**.
2. Enter a comment.
3. Click **POST**.

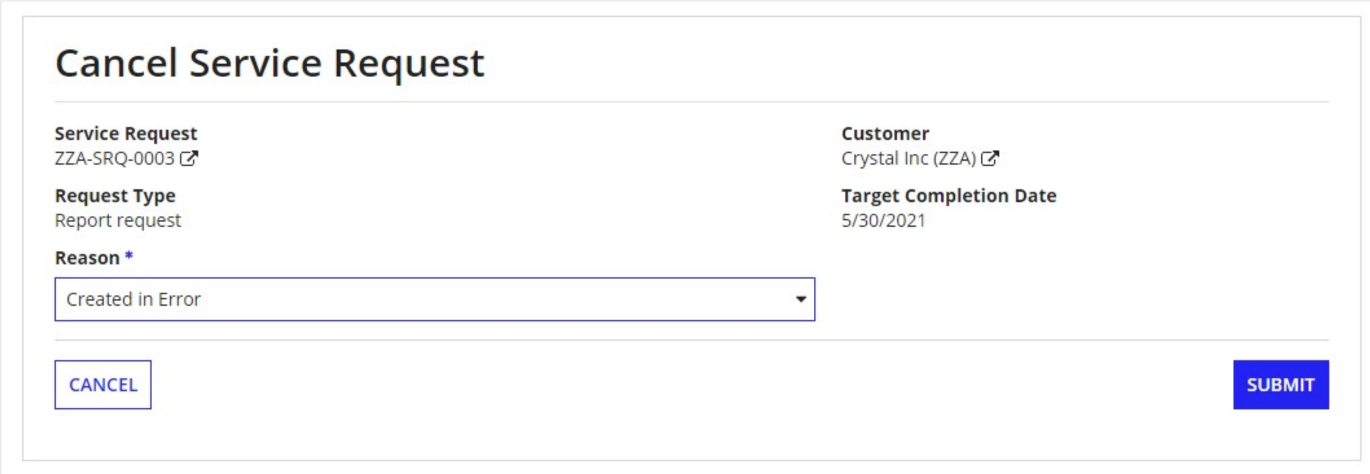


Cancel service request

For Pending and Active service requests, you can cancel a service request in the Related Actions tab.

To cancel a service request:

1. In the **Related Actions** tab for the service request, click **Cancel**.
2. Enter a **Reason** for the cancellation, then click **SUBMIT**.



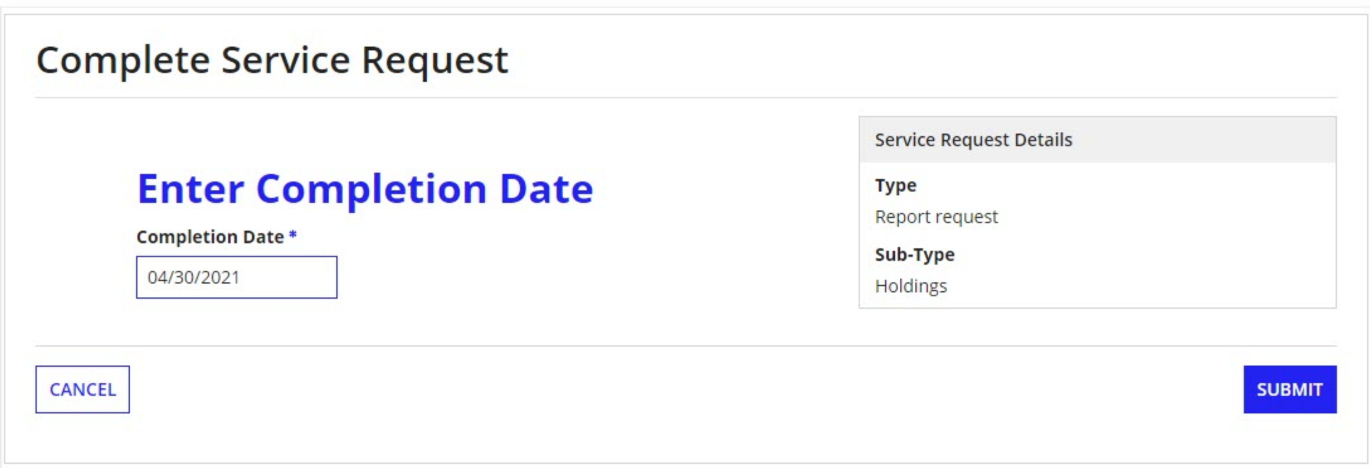
All outstanding tasks will be canceled. A canceled service request cannot be reopened, but all of the data will remain in the application.

Complete service request

For Pending and Active service requests, after you are ready to complete a service request, you can do so manually in the Related Actions tab or the system will automatically update the status to completed after the final task is done.

To complete a service request manually:

1. In the Related Actions tab for the service request, click **Complete**.
2. Enter the **Completion Date** for the service request, then click **SUBMIT**.



If there are any outstanding tasks, they will be canceled. A completed service request cannot be reopened, but all of the data will remain in the application.

Managing Tasks

Introduction

Appian Connected Servicing simplifies this process by bringing together all of those tasks in one system to be tracked.

The life cycle of a task in Connected Servicing is:

1. Create reusable tasks.
2. Create service request templates using these tasks.
3. Create additional tasks for a service request when needed.
4. Complete tasks.
5. Update the task status, including sending out a queued task and reopening a task.

This page outlines each step in the life cycle of a task for Appian Connected Servicing.

Create reusable tasks in Connected Servicing Settings

The Connected Servicing Settings site allows users to create reusable tasks that can be added to the service request templates.

See the Managing tasks section of Setting Up Processes for more information on adding and editing tasks.

Create service request templates

Service request templates assign default tasks for requests of a specific a type and sub-type. In order to complete customers' requests, you will need to create templates that are mapped to these types and sub-types.

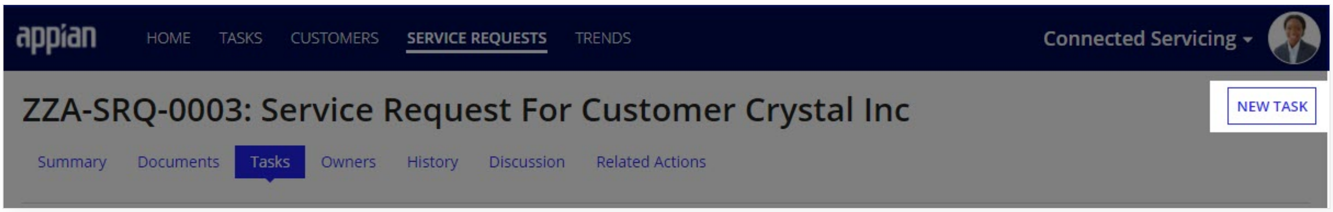
See the Managing templates section of Setting Up Processes for more information on adding and editing templates.

Create additional tasks

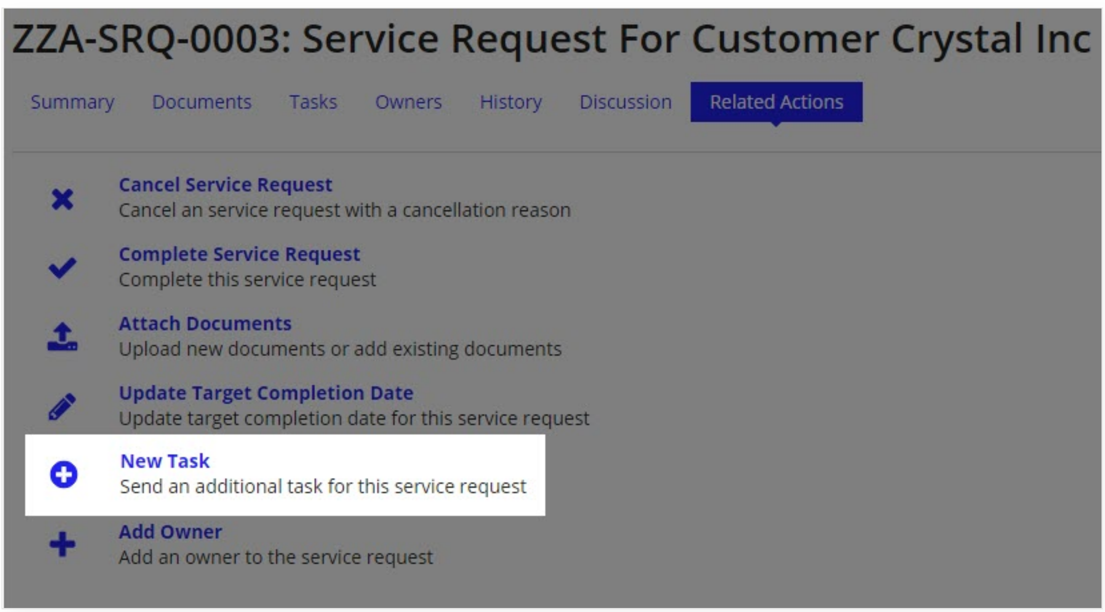
Sometimes after a service request has been created, a new task is needed that wasn't a part of the request template template.

For Pending and Active service requests, additional tasks can be created from several different places:

- In the **Tasks** tab, in the top-right corner, click **NEW TASK**.

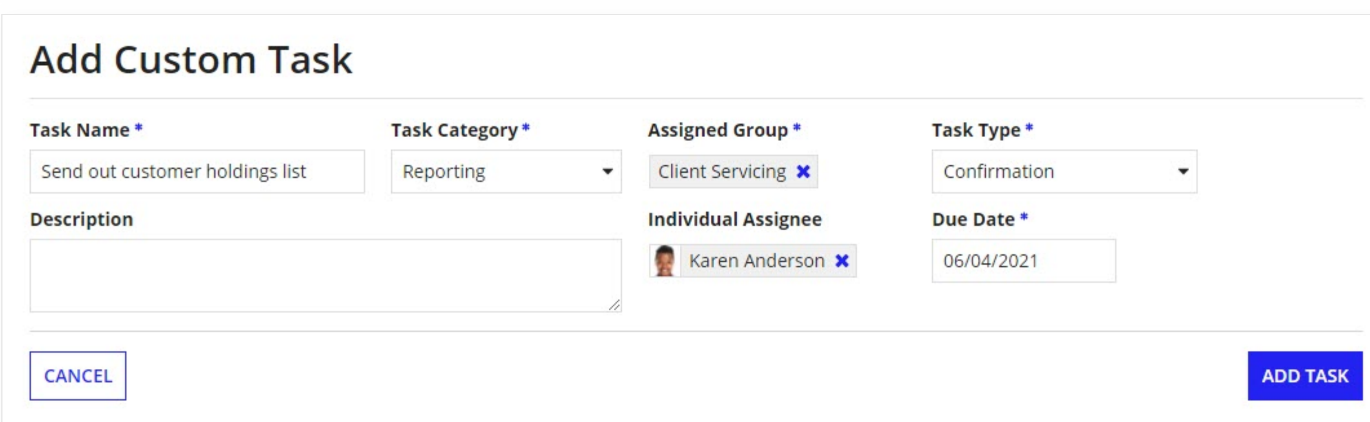


- In the **Related Actions** tab, click **New Task**.

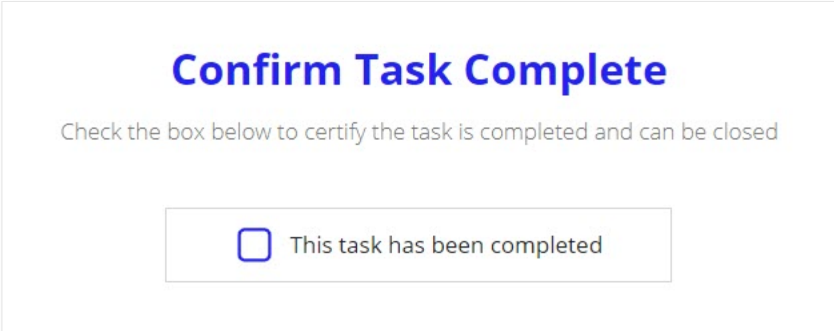


To create the task:

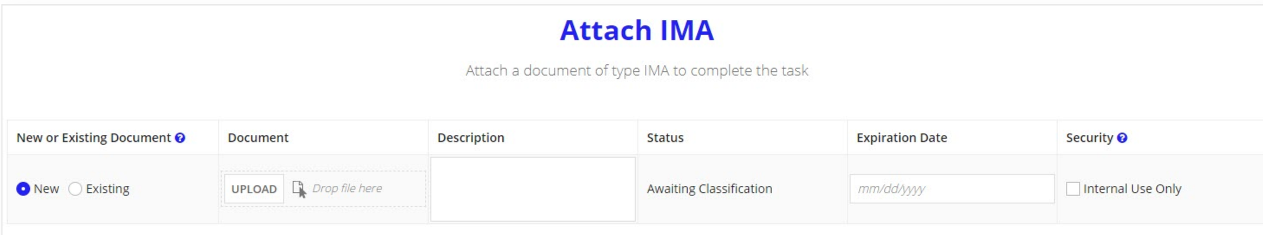
1. Enter a **Task Name**.
2. Select a business group to use as the **Assigned Group**. For example, **Client Services** or **Sales**.



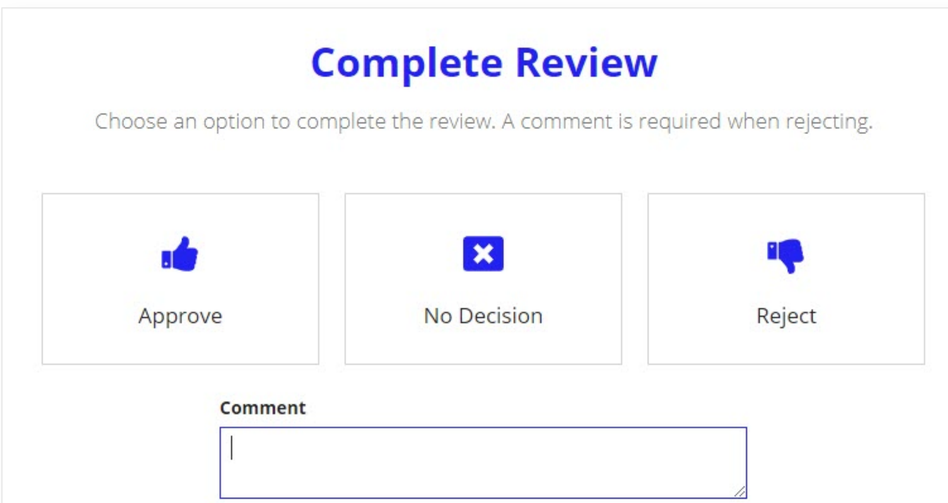
1. Select the **Task Type**. Additional tasks can be one of three types. See Adding a New Task Type for more instructions on adding more task types.
   - **Confirmation**: This type of task requires a user to select a checkbox that says the task has been completed.



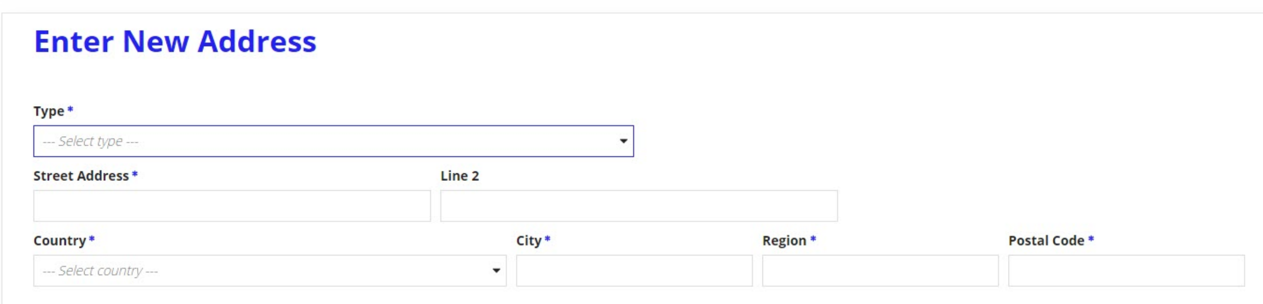
   - **Document**: This type of task requires a user to attach a specific document.



   - **Review**: This type of task requires a user to approve, reject, or make no decision on a task.



   - **Enter New Customer Address**: This type of task requires a user to enter address data for a customer.



2. (Optional) Enter a **Description**.
3. (Optional) Use the picker to select an **Individual Assignee** to assign the task to.
4. Choose a task **Due Date**.
   - The target completion date for the service request is listed below the calendar picker to help you determine an appropriate due date.

Complete tasks

In order to track the work that has been done, users mark off tasks as they complete them.

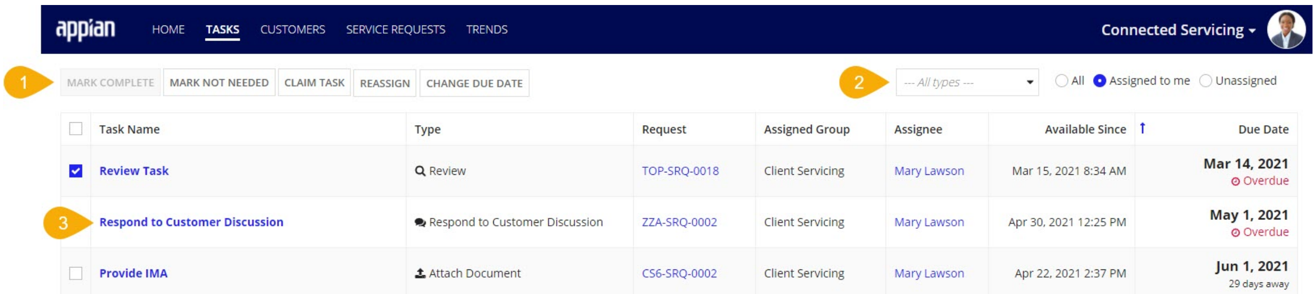
Users can access their tasks from the Tasks tab or from the Summary tab of a service request.

For managers, the task list shows all tasks, regardless of department or assignment. For all other users, the task list shows only tasks that are assigned to them or tasks that have been assigned to their team, but not have not been picked up by a team member.

The Summary tab lists all tasks, whether or not they are assigned to the logged in user or their team. Tasks that belong to a group that the user is not a member of cannot be opened or modified by the logged in user. However, if the user is a member of a group that a task has been assigned to, they can claim or reassign the task.

The following actions are available in the task list:

1. Select or bulk select tasks to complete available actions.
    - For non-required tasks, you can **MARK NOT NEEDED**.
    - For any task, you can **CLAIM TASK** or **REASSIGN**.
    - For Confirmation tasks, you can also select **MARK COMPLETE**.
    - For individual tasks, you can also select **CHANGE DUE DATE**.
2. Filter the list by **Type**, **All**, **Assigned to Me**, or **Unassigned**.
3. Click a task name to perform the required action.

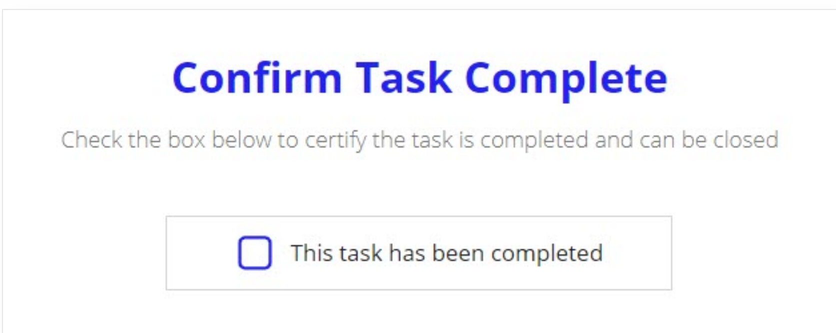


Completing confirmation tasks

Confirmation tasks require users to select a checkbox that says the task has been completed.

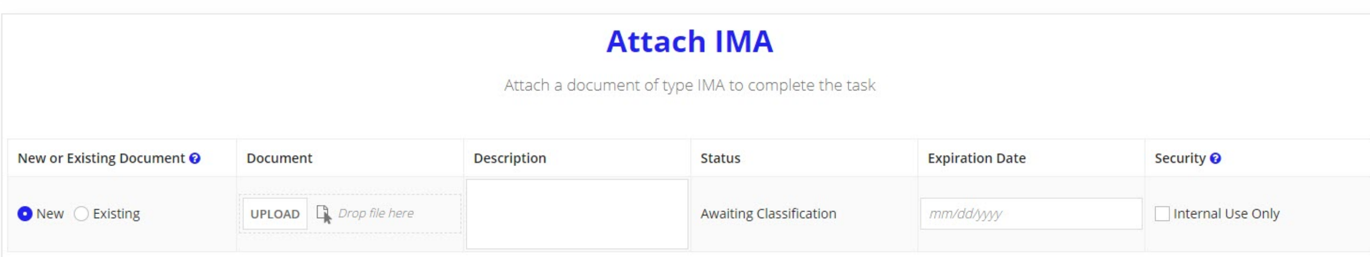
To complete a confirmation task:

- Select the checkbox to confirm the task has been completed and click **SUMBIT**.



Completing document tasks

Attach document tasks require users to attach a specific document to a customer service request. You can choose a document that has already been attached to that customer or attach a new document.



To complete a document task:

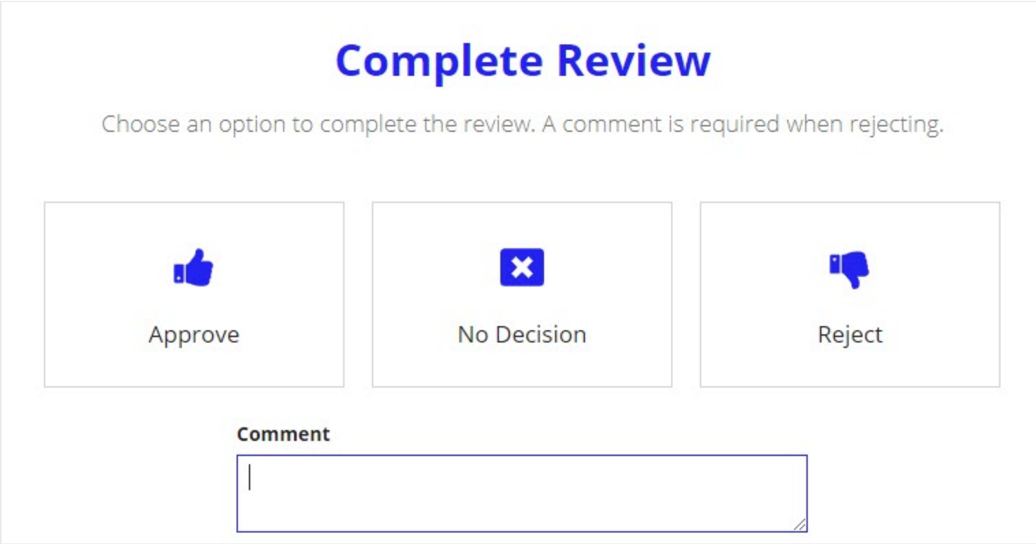
1. Select if you want to attach a **New** or **Existing** document.
2. If the document is **New**, click **UPLOAD** and select a document to attach.
3. If the document is **Existing**, click the document you want to attach from the dropdown list.
    - You will only be able to attach documents that have been previously uploaded and match the document type you want to attach.
4. (Optional) Enter a **Description** for the document.
5. (Optional) In the **Expiration Date** field, enter the date that the document expires.
6. Click **SUBMIT**.

Completing review tasks

Review tasks require users to approve, reject, or make no decision on a task.

To complete a review task:

1. Select **Approve**, **No Decision**, or **Reject**.
2. Enter a comment. This is optional unless you select **Reject**.
3. Click **SUBMIT**.

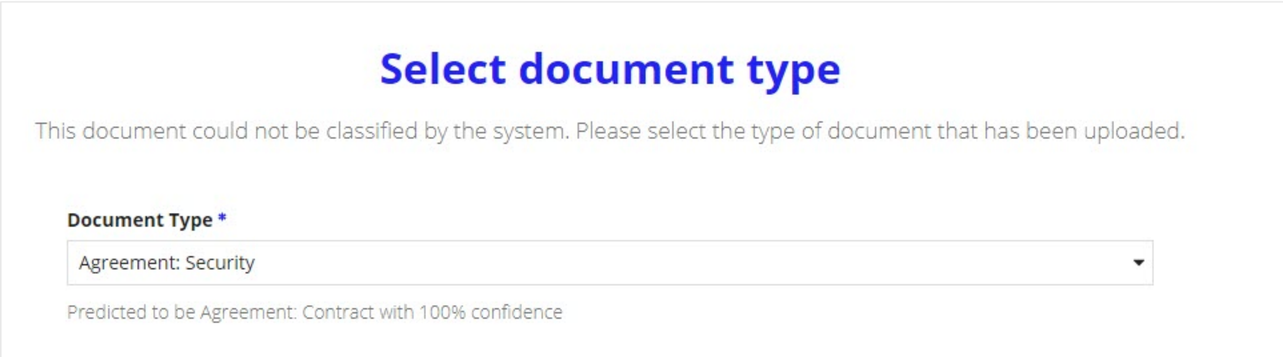


Completing document reconciliation tasks

Document reconciliation tasks are auto-generated by the system when a document is uploaded and one of the following conditions apply:

- The document type cannot be classified by type using intelligent document processing (IDP).
- IDP classifies the document but the type confidence is lower than the type confidence threshold.

These tasks will be assigned to the user that uploaded the document that needs to be classified. The document reconciliation tasks require the user to choose the **DOCUMENT TYPE**.



To complete a document reconciliation task:

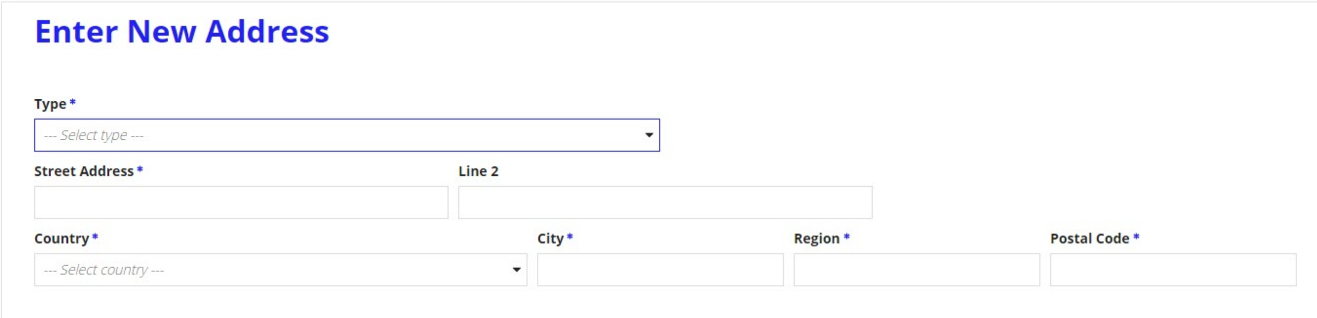
1. Select a **DOCUMENT TYPE**.
   - You are able to download a preview of the document that has been uploaded by clicking on the document name.
2. Click **SUBMIT**.

Once submitted, the document will reflect the document type and will have an **ACCEPTED** status and fulfill any required documents.

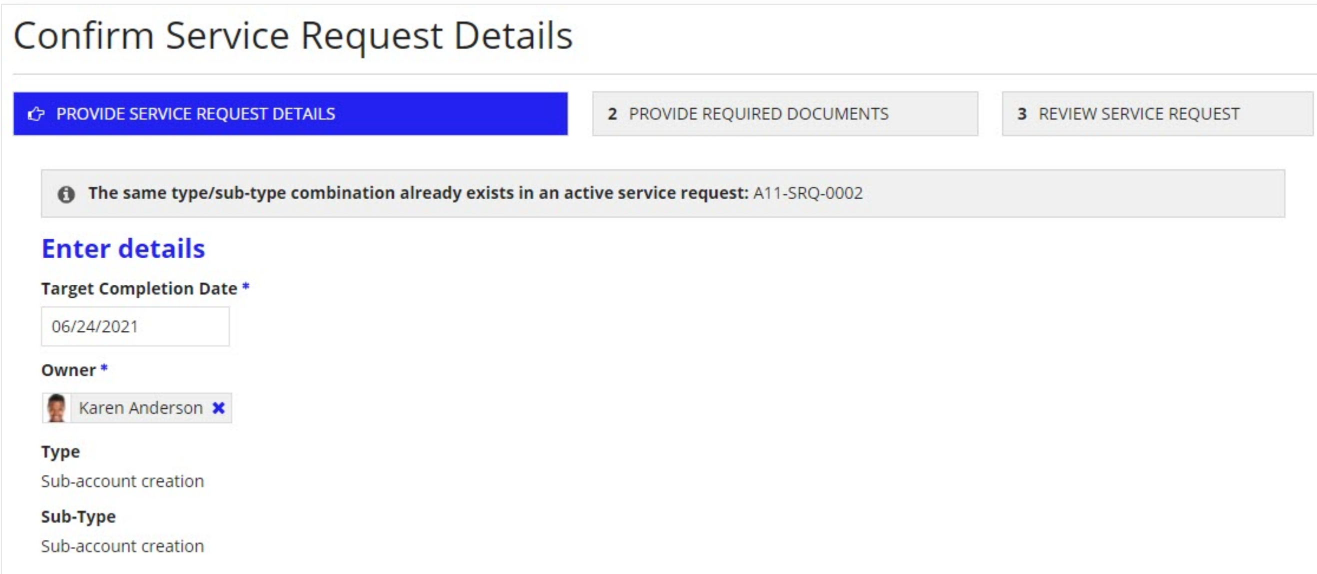
Completing data entry tasks

Data entry tasks are those where the user needs to fill out specific data to complete the task. By default, Connected Servicing has two data entry task types:

1. Enter Customer Address.



2. Confirm Service Request Details.



To complete data entry tasks:

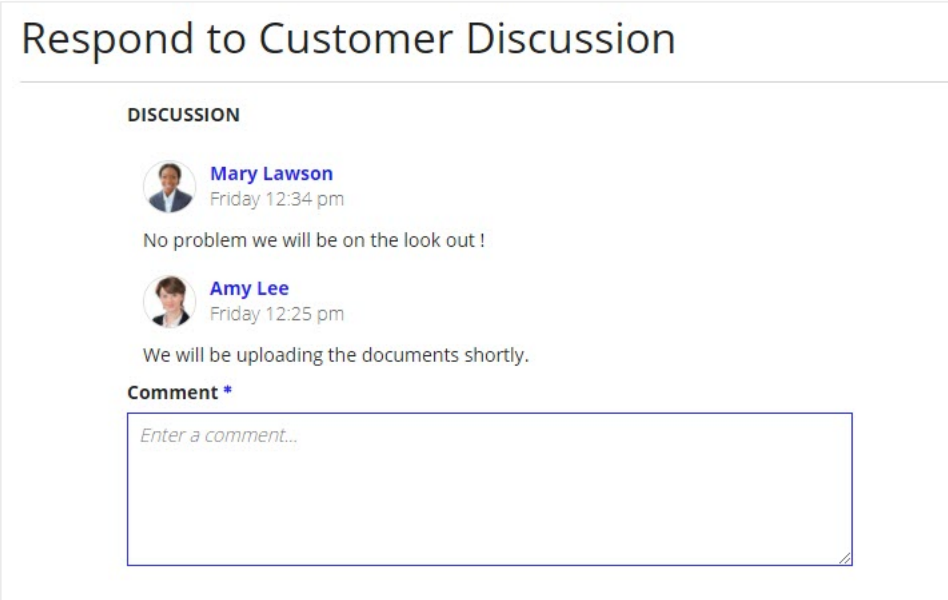
1. Fill out the required data.
    - **Note**: the required data will vary by data entry task type.
2. Click **SUBMIT**.

Completing respond to customer discussion tasks

When a customer portal user adds a post to a discussion thread, a **Respond to Customer Discussion** task is automatically opened for the owner of the service request. If there is not a primary owner of the service request, the task will not have an individual user, but the default assigned group will be client servicing.

To complete respond to customer discussion tasks:

1. Enter a **Comment**.
2. Click **SUBMIT**.



The customer will be able to view the response on the service request in the customer portal. The comment will also be available on the **DISCUSSION** tab of the service request.

Update task status

Learn more about the different task statuses and their related actions.

Send out a queued task

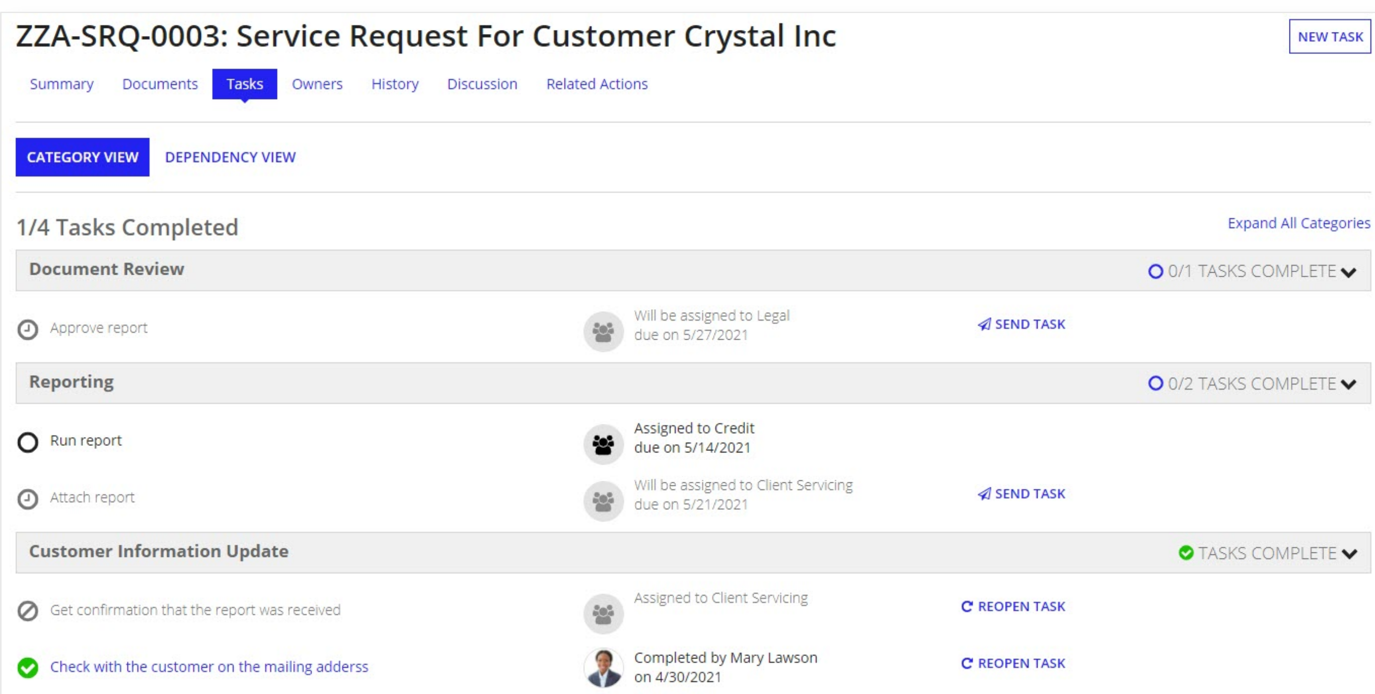
Assigned tasks are denoted by an open circle icon ○. **Queued** tasks are denoted by the clock icon.

Assigned tasks have been kicked off by the completion of a precedent(s) or the process setup task, whether or not they have been claimed by a specific user.

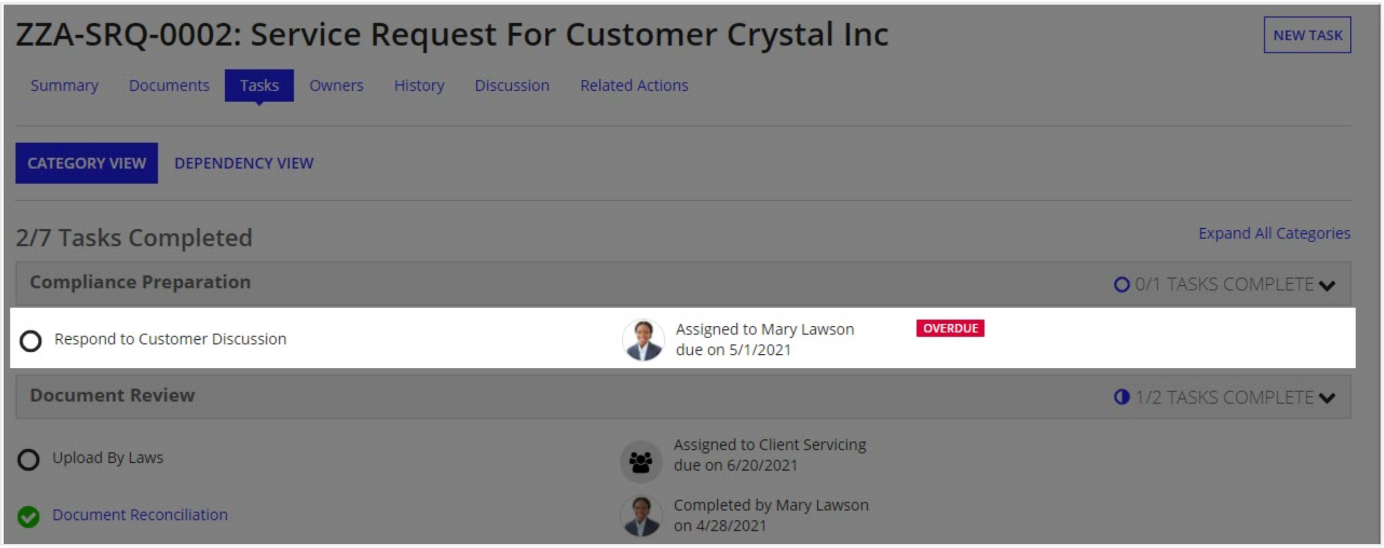
Queued tasks are waiting on a precedent task(s) to be completed before kicking off. These are denoted by a blue paper plane icon SEND TASK

For tasks that are queued, you can kick them off without completing their precedent tasks by clicking the blue paper plane icon SEND TASK.

This will bypass any precedents and assign the task to the default group.



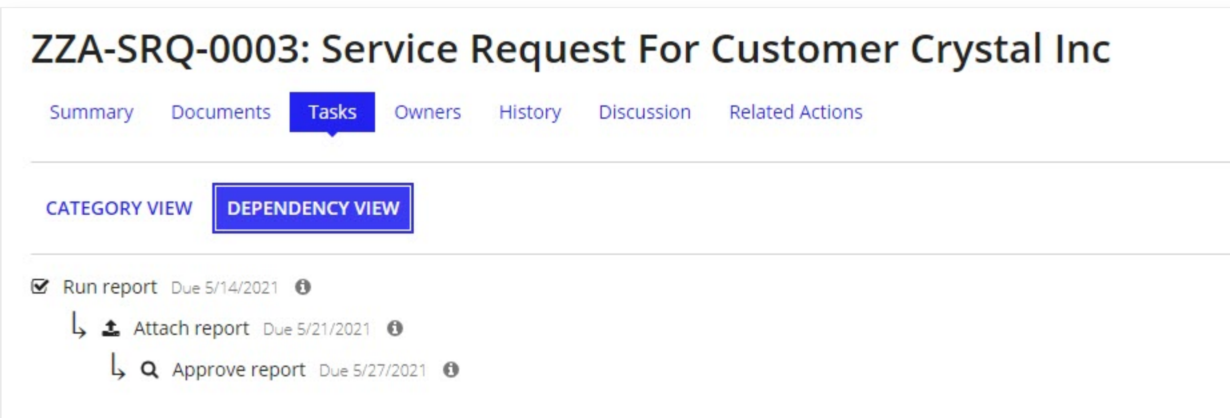
For tasks with a due date that has passed, an overdue icon will appear next to that task.



Dependency view

You can also view tasks from the **DEPENDENCY VIEW** on the tasks tab.

The tasks are displayed so that a user can see a specific open task and all of its dependent tasks in a cascading list.



Reopen task

On the tasks tab, you can resend **Completed** and **Not Needed** tasks by clicking the blue reopen task icon REOPEN TASK .

Managing Documents

Introduction

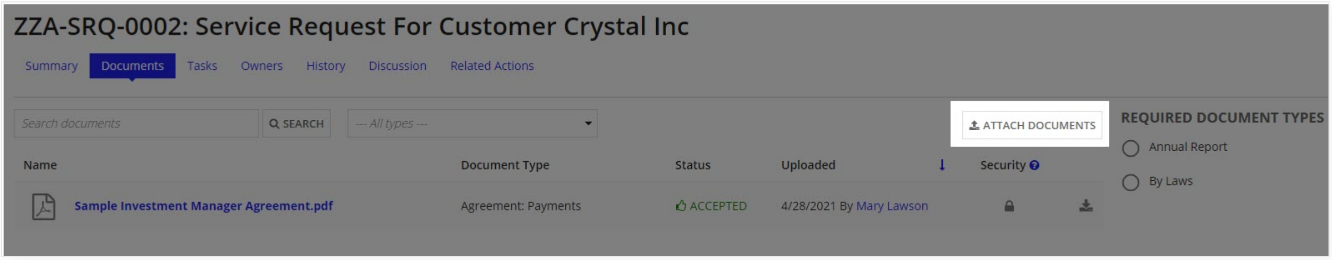
Service requests can involve a lot of documentation. From tax forms to agreements, Appian Connected Servicing allows you to manage all of your documents in one place. When enabled, Connected Servicing uses the power of intelligent document processing (IDP) to properly classify the document type for an uploaded document. This ensures data integrity and saves time.

This page describes how to update, attach, and manage documents in Connected Servicing.

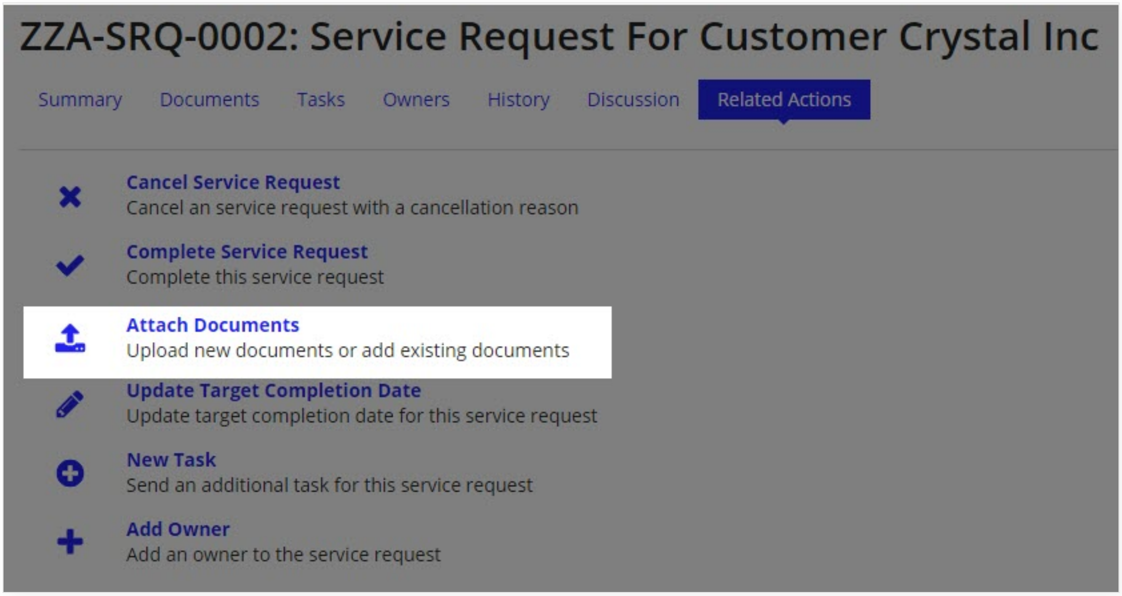
Attach document

To fulfill requirements of the service request process, users may need to attach documents. For all Pending and Active service request, users can attach documents from the following places:

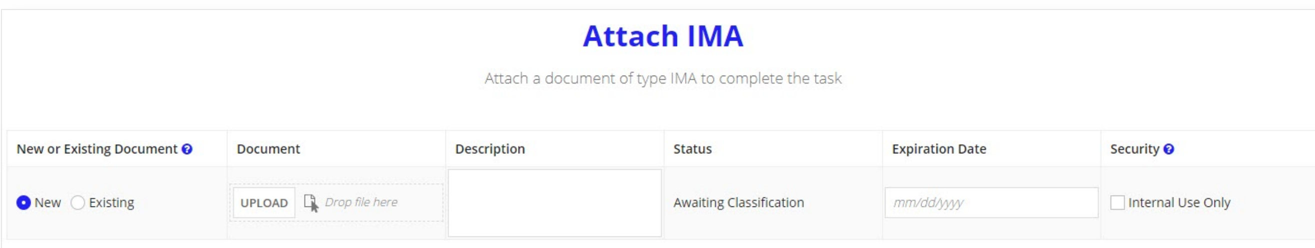
- In the **Documents** tab, click **ATTACH DOCUMENTS**.



- In the **Related Actions** tab, click **ATTACH DOCUMENTS**.



- You can also attach a document through a task. After you attach the document, the task will complete automatically.



To attach a document:

1. Select if the document is **New** or **Existing**.
2. If the document is **New**, click **UPLOAD** and select a document to attach.
3. If the document is **Existing**, click the document you want to attach from the dropdown list.
4. (Optional) Enter a **Description** for the document.
5. (Optional) In the **Expiration Date** field, enter the date that the document expires.
6. (Optional) Change **Security** to be an internal document, if you do not want the document to be available to customers on the Customer Portal.
    - **Note**: When uploading customers will not see the security option.
7. Click **ATTACH**.

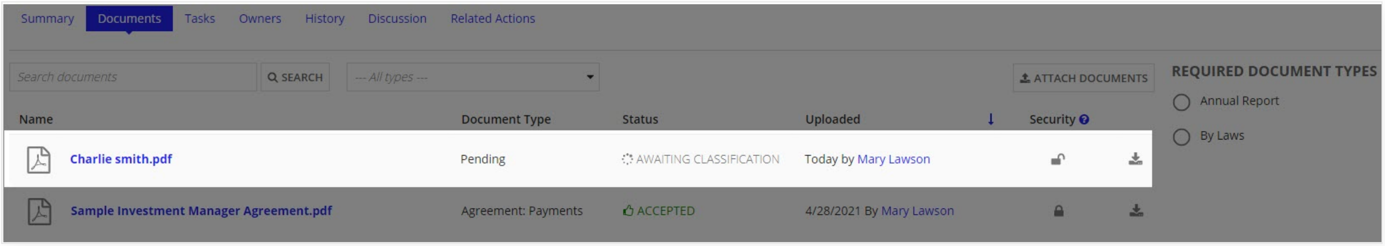
Classify documents

It is crucial to ensure the correct documents are uploaded to the system. Connected Servicing enables users to classify documents by type to easily help client servicing keep track of what documents have been uploaded.

Set document type automatically

If Intelligent Document Processing (IDP) is enabled and set up in your environment, the Connected Servicing systems will classify your documents by type automatically saving users time and ensuring accuracy with each document upload.

When IDP is enabled, the **DOCUMENT TYPE** is not available for selection when uploading a document. Instead, the system will automatically classify the document and set the **DOCUMENT TYPE** after a user uploads a document. While the document classification is in-progress the **DOCUMENT TYPE** will be listed as **PENDING**.



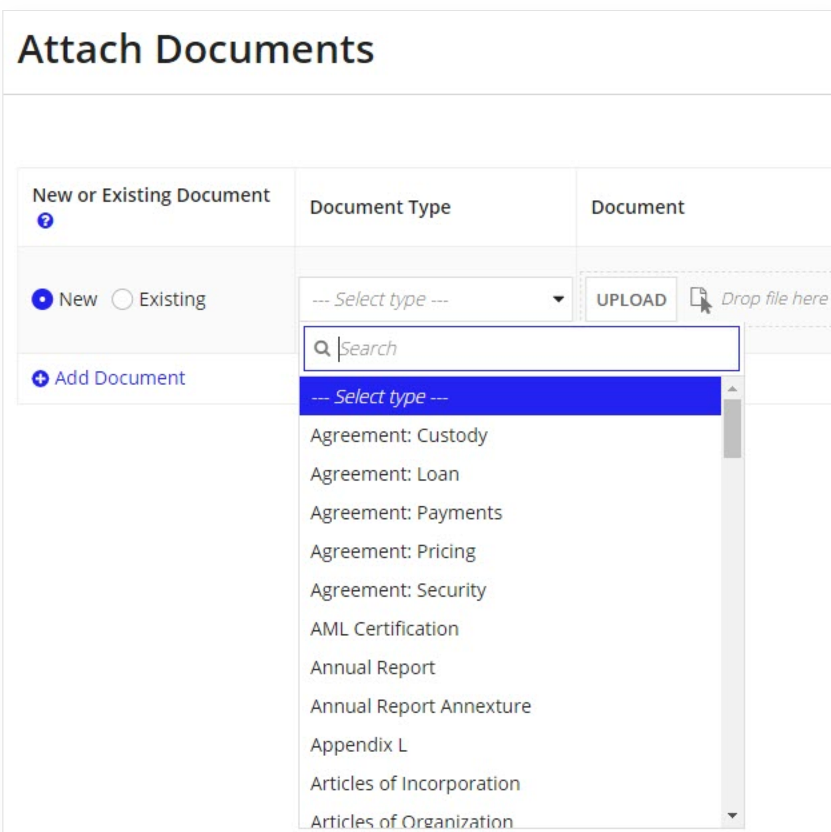
If the system cannot match the uploaded document to a **DOCUMENT TYPE** or the system's confidence level is below the threshold set by the administrator, a **DOCUMENT RECONCILIATION** task will be generated and assigned to the user that uploaded the document. The user will be able to manually select the **DOCUMENT TYPE** at that time and the type confidence level will be set at 100%.

You can view a **TYPE CONFIDENCE** level for a specific document by clicking on that document from the document list and viewing the document details.

If the system classifies the document incorrectly, a user can update the document type.

Set document type manually

If IDP is not enabled or set up, users will need to select **DOCUMENT TYPE** manually when uploading documents. A dropdown will be available for them to select from any of the document types.



The **TYPE CONFIDENCE** level field will not be shown when IDP is turned off.

Set document status

Document statuses are used to make sure that documents are accurate. Which document statuses are available depend on if IDP is enabled in the environment.

The document statuses are:

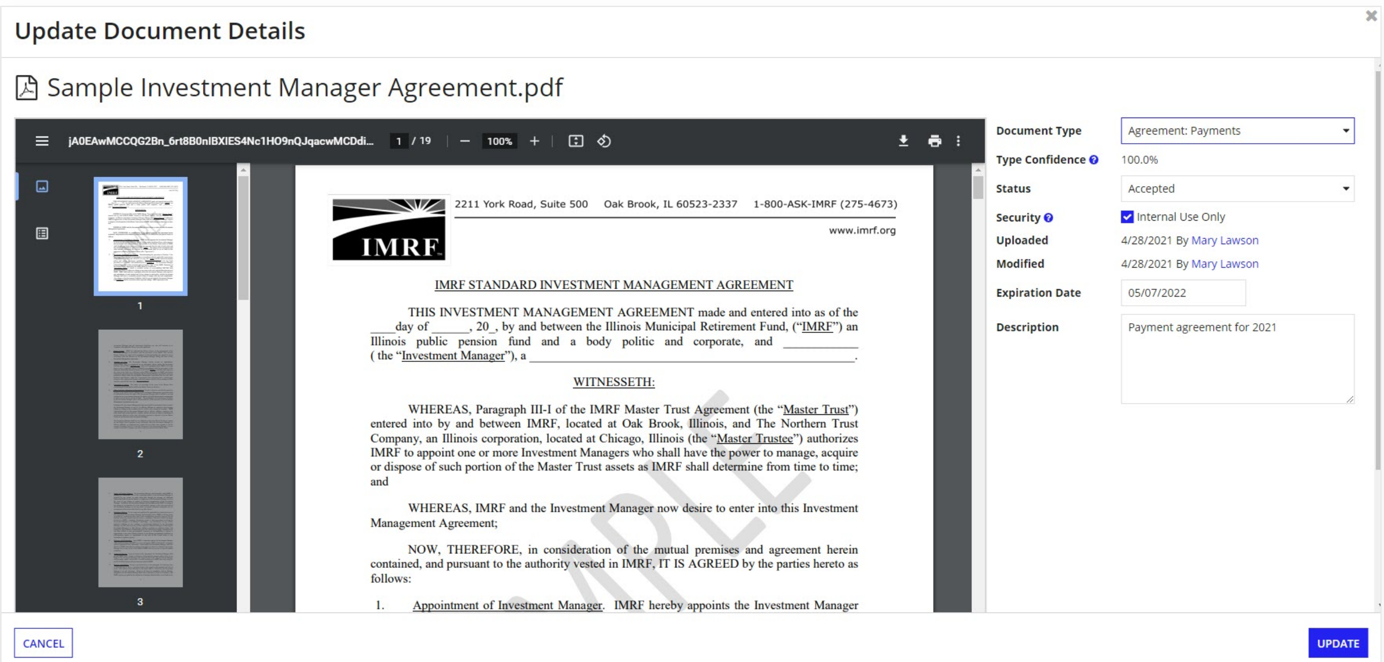
- Accepted: a document has been accurately classified by IDP or a user, and the type confidence is above the confidence level threshold.
    - **Note:** a user can manually update this status.
- Rejected: a document has not been classified by IDP or the type confidence is below the confidence level threshold.
    - **Note:** this status can be updated manually by a user.
- Awaiting Classification: a document is waiting to be classified by IDP.
    - **Note:** this status is only available when IDP is enabled and all uploaded documents will have this status until IDP or a user has classified the **Document Type**.
- Submitted: a document is waiting for the status to be updated manually by a user.
    - **Note:** this is the default status when documents are uploaded and IDP is disabled.
    - **Note:** this status is only available when IDP is disabled.

Update document details

After a document has been uploaded, a user is able to update the document details to ensure accuracy of the documents on the service request.

The user can update the following details:

- Document type
- Status
- Security
- Expiration date
- Description



To update the details of a document from the **DOCUMENTS** tab:

1. Select the document you want to update in the document list.
2. Click **UPDATE DETAILS**.
    - You can now edit the **Document Type**, **Status**, **Security**, **Description**, and **Expiration Date** fields. Additionally, a document can be deleted, but only by the user who originally uploaded it.
        - **Note**: The **Description** and **Expiration Date** of the document will be updated across all service requests where it's referenced.
        - **Note**: The **Status** will only be updated for each unique service request.
3. Click **UPDATE** to save your changes.

Delete a document

If a document is no longer required for an service request or a customer, it can be removed by the user that originally uploaded the document.

For service requests, when a document is deleted, it is still available on the customer's document tab.

For customers, if a document is deleted, the document will no longer be available on the customer's document tab. Additionally, the document can no longer be used as an existing document for other service requests. A customer document cannot be removed if it is being used on any service request.

To delete a document:

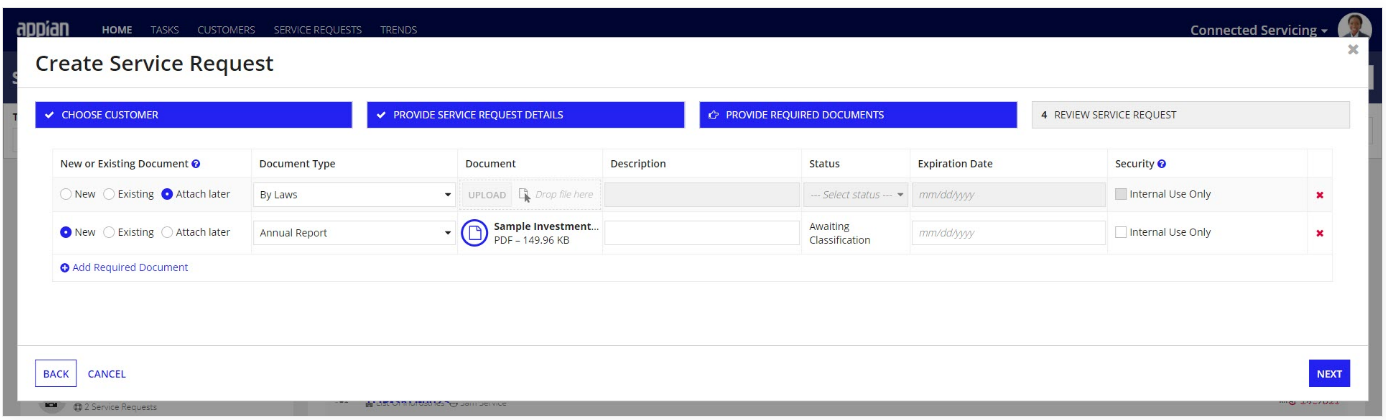
1. From the document grid, click the document you would like to delete.
2. Click **REMOVE**.
3. On the confirmation page, click **REMOVE** again.

Manage required documents

For a specific service requests, there may be certain documents that are required to complete the request. In order to keep track of these documents, Connected Servicing will show the user a checklist of which documents are outstanding and open an attach document task for any outstanding documents.

Add required documents to a service request

A required document can be added when during the [create service request](#) process.



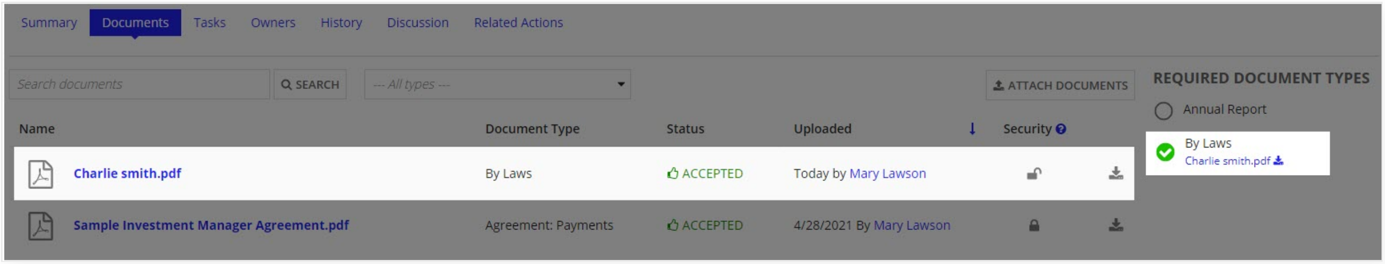
View required documents

Because required documents are vital to the service request process, a user is able to view the required document checklist in many places.

You can view the required document checklist:

- On the service request **SUMMARY** tab.
- On the service request **DOCUMENTS** tab.
- While completing document upload tasks.

On the checklist, an empty circle icon indicates that the document has not been uploaded and accepted. A green circle icon indicates that a document of the correct type has been attached and has a status of **ACCEPTED** and therefore, the required document has been fulfilled.



Managing Customers

Introduction

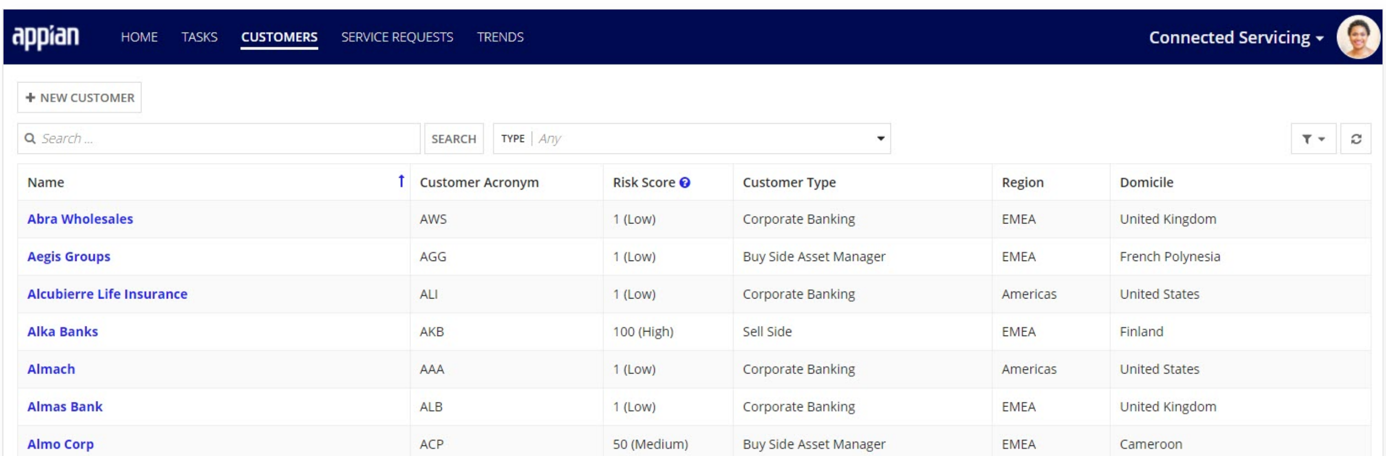
It is important to have easy access to all of your customer's data. The **Customers** record page contains all of this data, and allows users to take action on that data.

This page describes the customer workflow, including how to view, create, and update customer information.

See Using Records for more information on Appian Records.

Viewing information for a customer

From the Connected Servicing site, clicking **CUSTOMERS** displays a list of customer records. You can filter this list by searching for a customer or filtering by customer type.



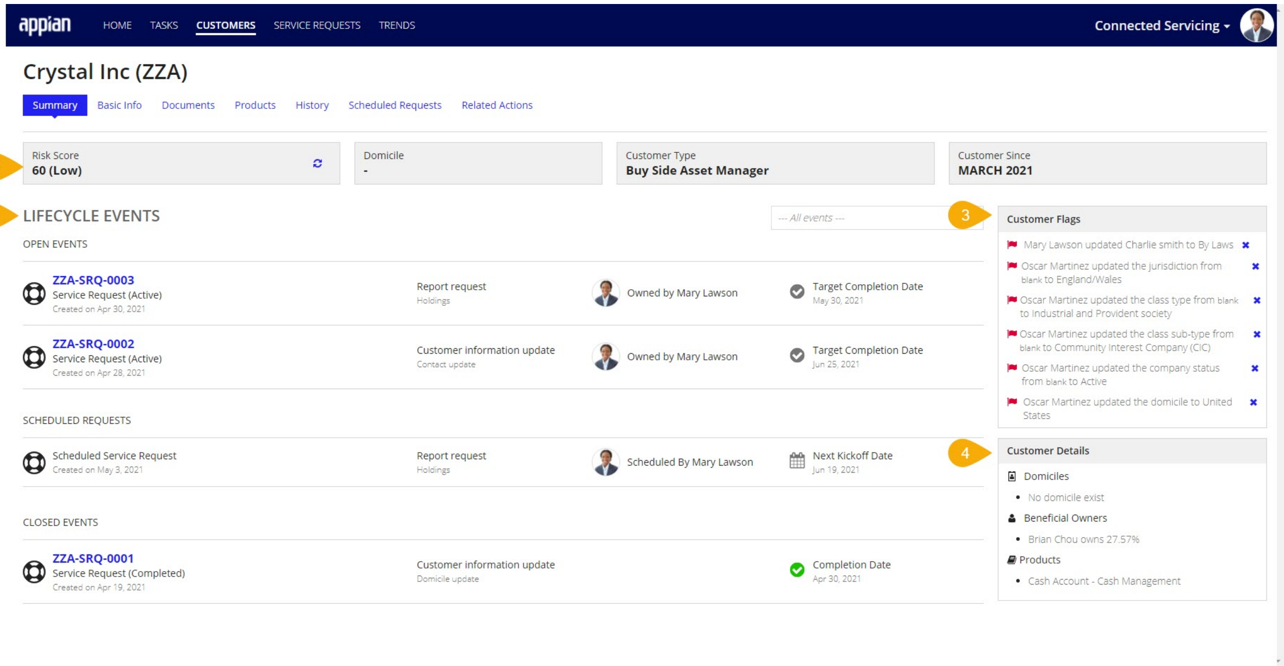
Clicking a customer name displays the record for that customer. The record displays all of the pertinent information for a particular customer. This information is split into several different pages, which are outlined in the following sections.

Summary tab

The **Summary** tab lists the important information about a customer.

The following customer information is listed on this page:

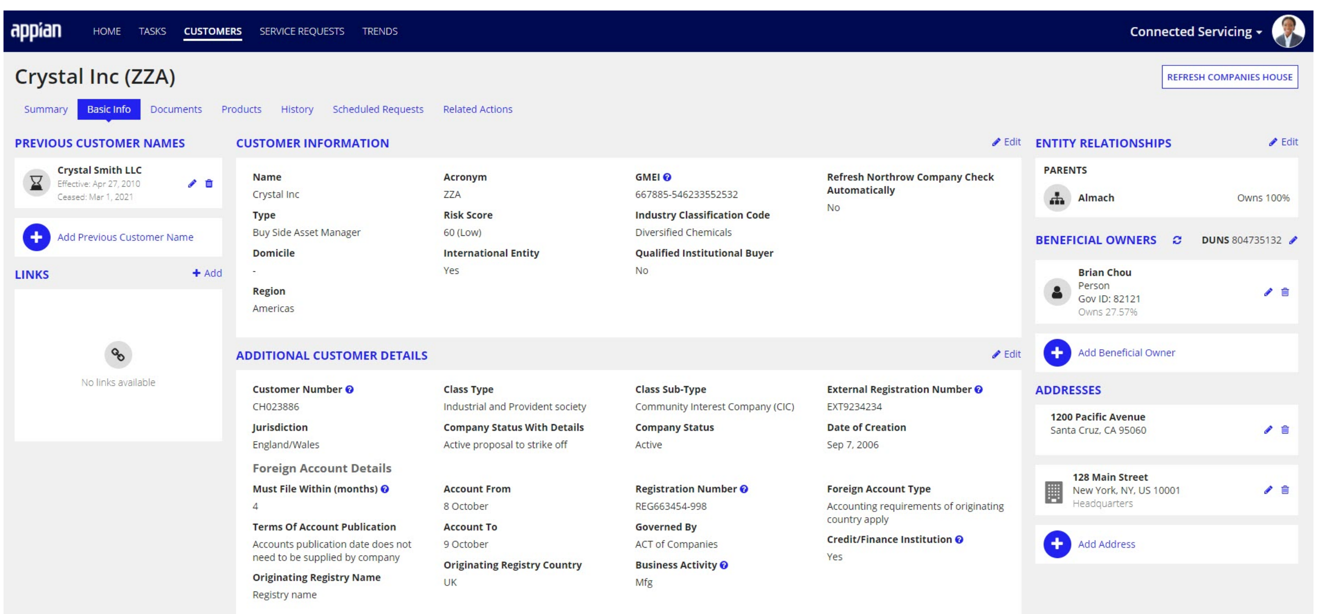
1. **Customer Information** - This is where the most important information about the customer displays including: risk score, domicile, customer type, and the year the customer was entered in the system.
2. **Lifecycle Events** - Any lifecycle event that has occured for this customer will be displayed here with pertinent information and sorted by status.
3. **Customer Flags** - If a flag is open for the customer, the details will display in the box.
4. **Customer Details** - Additional details including the beneficial owners and which products the customer have will display in this box.



Basic Info tab

The **Basic Info** tab shows all customer information. The customer information is split up into the following groups:

1. Previous Customer Names
2. Customer Information
3. Additional Customer Details
4. Entity Relationships
5. Links
6. Beneficial Owners
7. Benchmark Details
8. Addresses
9. Contacts



It is possible to update all the information on this page directly from here using the edit, add, and delete icons.

Some basic information can be populated using integrations if they are connected through the System Administration Center. See the Companies House, Dun and Bradstreet, and Northrow integrations for more information on pulling in customer data.

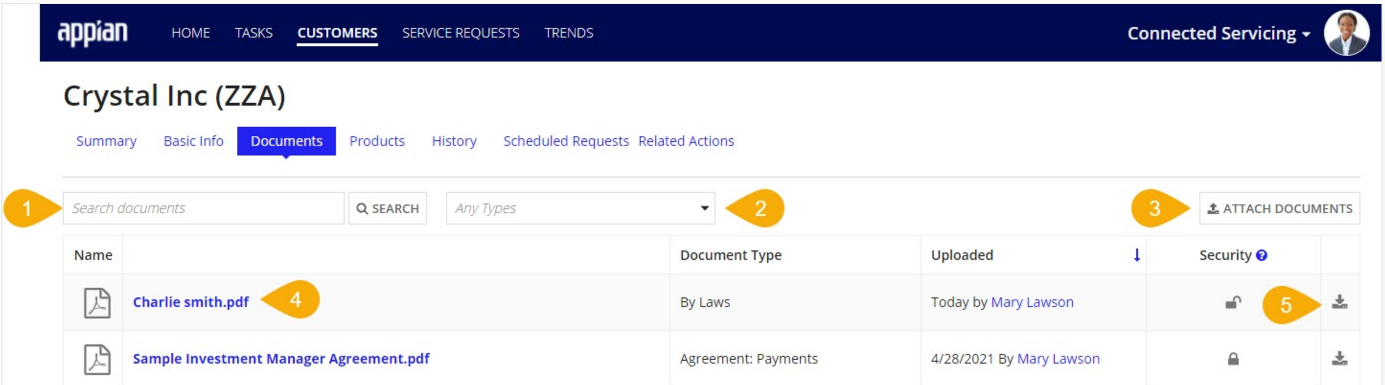
Documents tab

The **Documents** tab shows all of the documents associated with a customer.

On this page, you can:

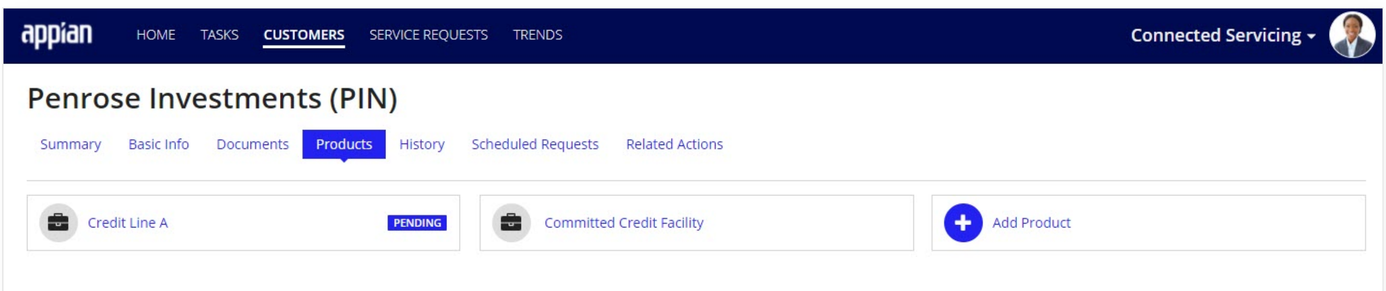
1. Search for a particular document by name.
2. Filter by document type.

3. Attach a document.
    - These documents can be later attached to any service requests associated with the customer. For example, if you attach a tax document for a customer, you can reuse it for any additional service requests they might have.
4. Preview uploaded documents.
    - Click the document link to preview uploaded documents, view details about them, and update their status.
    - Any updated details will appear wherever the document is referenced.
5. Download uploaded documents.



Products Tab

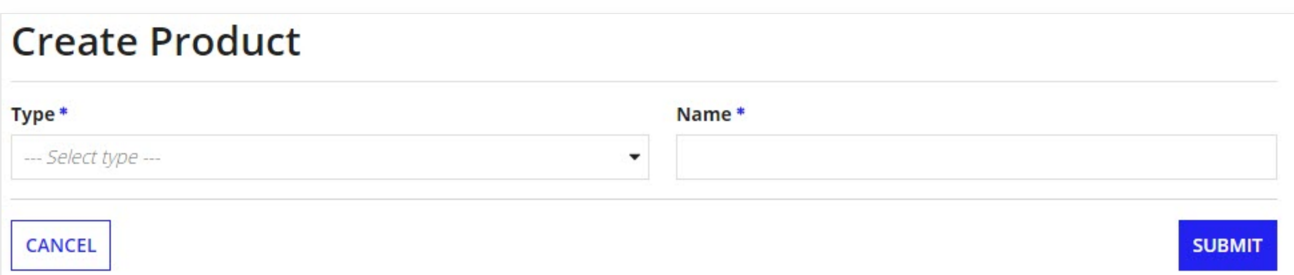
The **Products** tab on the customer record shows the products that the customer has. Products that are being edited as part of a service requests with show a **PENDING** tag. As user can hover over the **PENDING** tag to see which service request is involved in updating that product.



Add a product

To add a product to a customer:

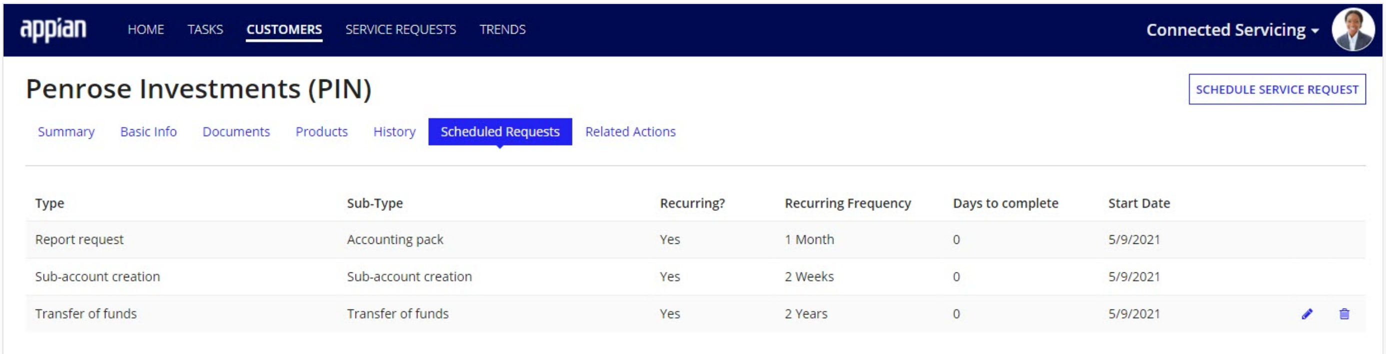
1. Click **Add Product**.
2. Select the **Type** and enter **Name** of the product.
3. After a **Type**, enter any required information in the additional fields that appear that are associated with that product type.
4. Click **Submit**.



Scheduled Requests

If a customer has upcoming service requests, a user can add them to the **Scheduled Requests** tab in order to keep track of them. Once scheduled, these requests will automatically kick off, giving the Client Servicing team enough time to complete the request before the designated deadline.

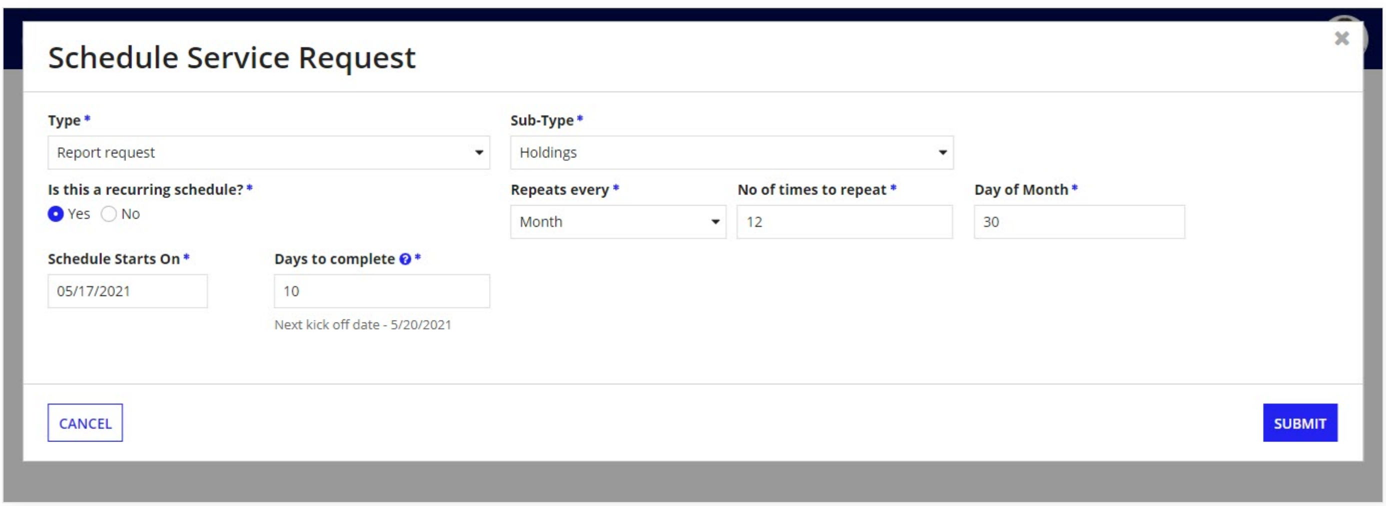
The **Scheduled Requests** tab shows a list of all of the scheduled requests and their corresponding details available for the customer.



Add a scheduled request

To add a scheduled service request:

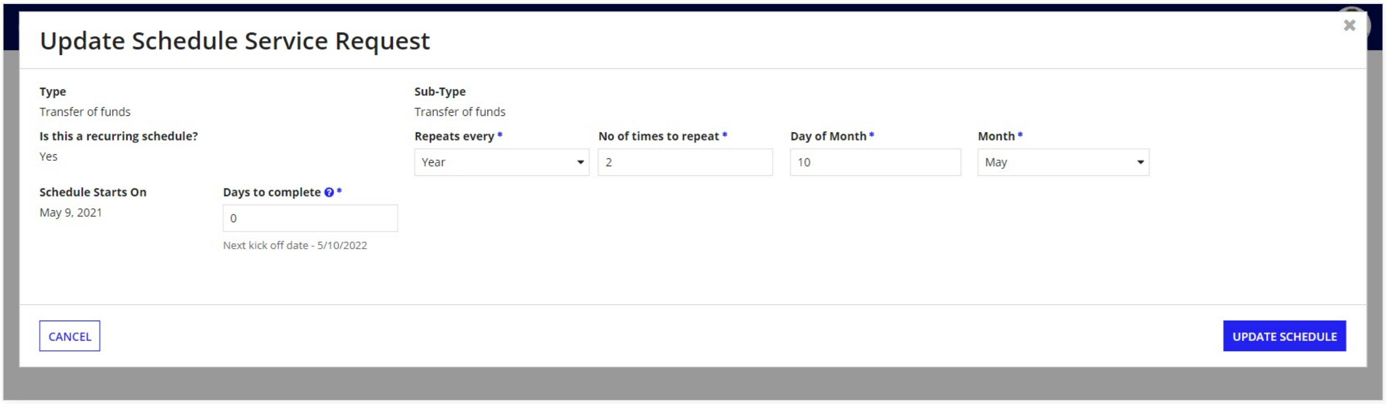
1. Click **SCHEDULE SERVICE REQUEST**.
2. Fill in the details for the **Schedule Service Request**.
    - **Type**: the type of service request to generate.
    - **Sub-type**: the sub-type of the service request to generate.
    - **Is this a recurring schedule?**: determines if multiple schedule requests should be generated.
    - **Repeats every**: Determines when the service request is scheduled on. Options are week, month, or year.
    - **No of times to repeat**: the number of times to generate the request.
    - **Recurring Day**: which day of the week to schedule the service request for if the user selected repeat every week.
    - **Day of Month**: which day of the month to schedule the service request for if the user selected repeat every month or year.
    - **Month**: which month to schedule the service request for if the user selected repeat every year. - **Schedule Starts On**: what date should the schedule start on. - **Days to Complete**: the number of days all of the tasks for the service request are expected to take.
3. Click **SUBMIT**.



These requests will reflect on the managers home page in a **Scheduled** status. Once a kick off day for a scheduled service request arrives, the client servicing group will receive a task to confirm the service request details and the service request status will be set to **Pending**.

Update Schedule Requests

1. Click the ✎ icon .
2. Update any details for the **Schedule Service Request**.
    - **Repeats every**: Determines when the service request is scheduled on. Options are week, month, or year.
    - **No of times to repeat**: the number of times to generate the request.
    - **Recurring Day**: which day of the week to schedule the service request for if the user selected repeat every week.
    - **Day of Month**: which day of the month to schedule the service request for if the user selected repeat every month or year.
    - **Month**: which month to schedule the service request for if the user selected repeat every year.
    - **Days to Complete**: the number of days all of the tasks for the service request are expected to take.
3. Click **UPDATE SCHEDULE**.

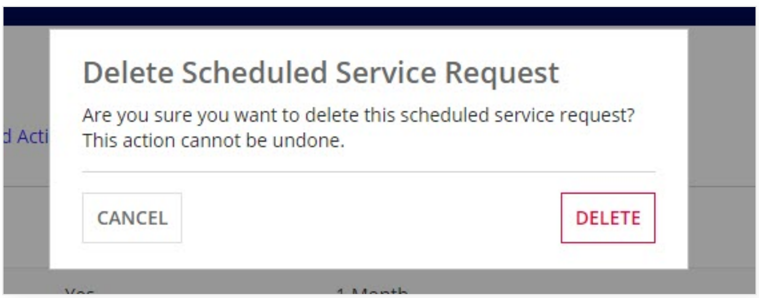


Any scheduled service requests that had not yet kicked off will be affected and if no longer applicable due to the updates, removed from the scheduled service request list.

Delete Schedule Requests

To remove a schedule service request:

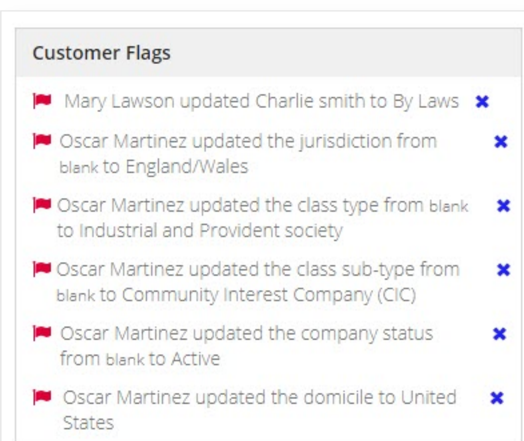
1. Click the 🗑 icon.
2. Click **DELETE**.



Any scheduled service requests that had not yet kicked off will removed from the scheduled service request list.

Managing customer flags

Customer flags are created by the system in order to bring a users attention to recent information changes for a customer. Customer flags can be triggered by manual or automatic updates to customer data or alerts from external systems.



By default the following items will create a customer flag:

1. Changes to the following pieces of customer information.
   - Risk score
   - Domicile
   - Beneficial owners
2. An alert from Northrow.
3. Changes to a customer document type.

Dismissing customer flags

If a user deems that a customer flag has been addressed or is inconsequential, they may dismiss the flag, which will remove the flag from the customer record. If any user dismisses a flag, no other user will be able to see the flag on that customer record. By default, Client Servicing Department heads have access to dismiss customer flags.

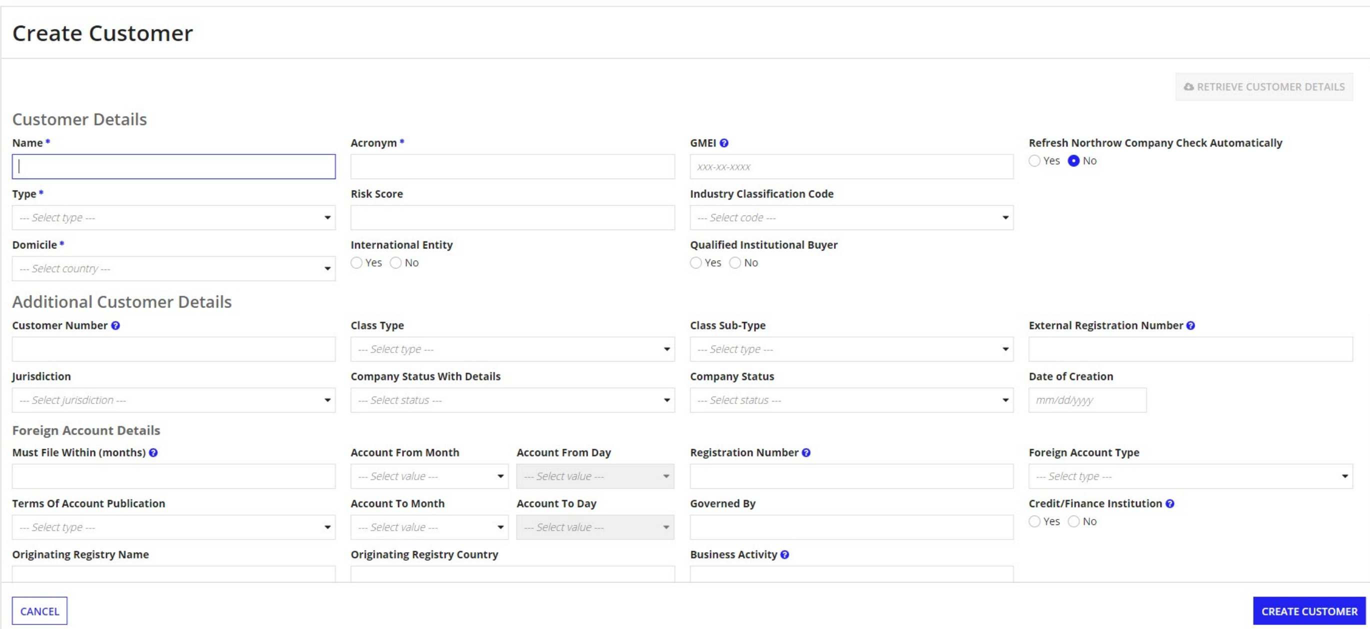
To dismiss a customer flag, click the ✖ next to the flag you would like to dismiss.

Creating a new customer

New customers can be created from the Customers record page.

To create a customer from the Customers record page:

1. From the **CUSTOMERS** record page, click **CREATE CUSTOMER**.
2. Fill out the fields.
    - See adding an entity relationship
    - See adding beneficial owners
    - See adding addresses
    - See adding contacts
    - See adding previous customer names
    - See adding customer links
3. Click **Create Customer**.

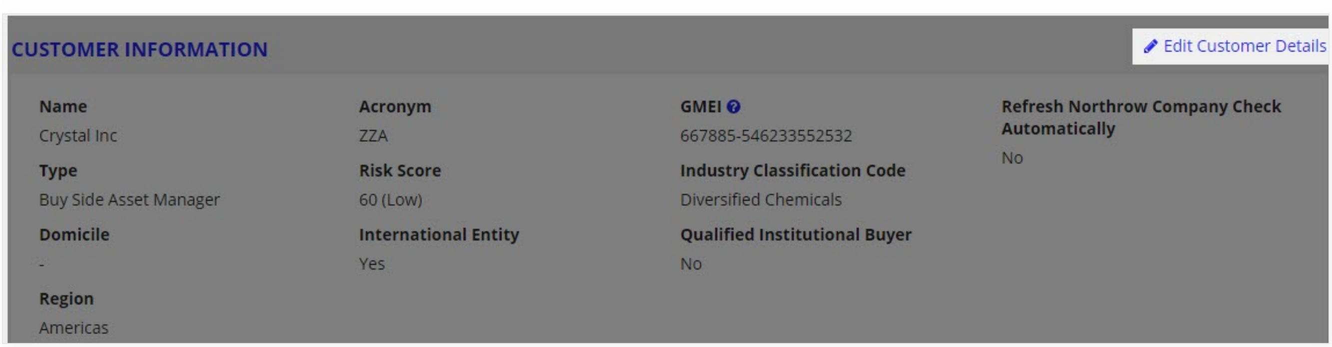


After a customer is created, they can be selected when creating a new service request or when updating the relationship structure for another customer.

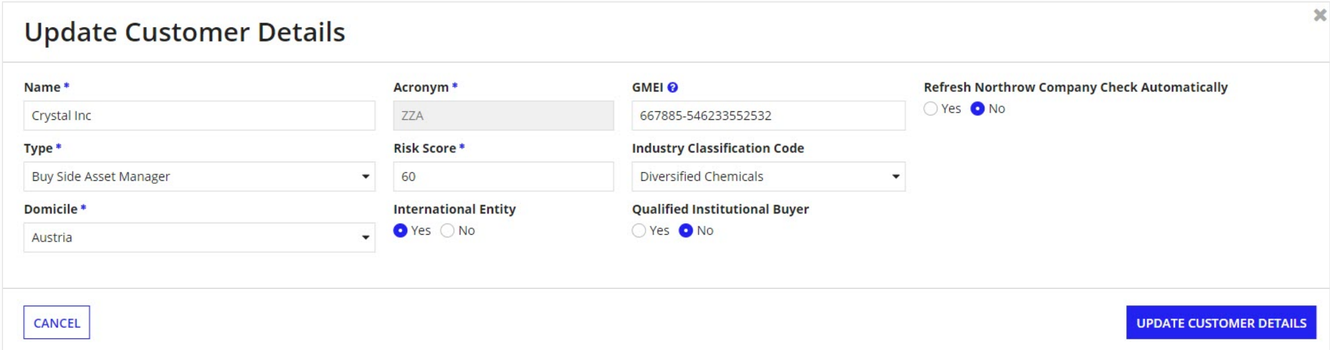
Update customer details

The information for a customer can be updated on the **Basic Info** tab.

1. Click **Edit Customer Details**.



2. Update the form with new customer details.



3. Click **UPDATE CUSTOMER DETAILS**.

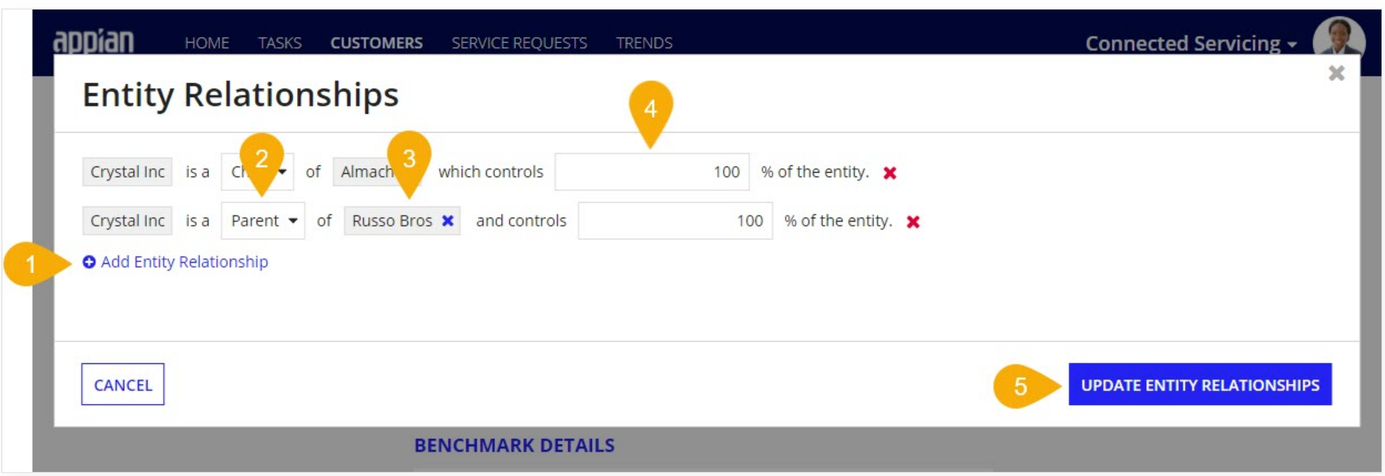
Update an entity relationship

On the **Basic Info** tab for a customer or during customer creation, **Entity Relationships** can be added by clicking **Add**. If a relationship has already been added click **Edit**.

Adding an relationship structure

You can optionally establish or update the relationship structure for the customer by adding parent and child relationships.

1. Click **Add Relationship**
2. Select whether the new customer is a **Parent** or **Child**.
3. Search for the customer name that is related to the new customer. This customer must already exist in the application. If it does not, Add a New Customer from the Customer tab.
4. Enter the percentage of control.
5. To add an additional relationship, click **Add Entity Relationship** again. To delete a relationship, click the red **x**. When all relationships are added click **UPDATE ENTITY RELATIONSHIPS**



Automatically updated relationships

Relationships are automatically reflected in the entity relationship section of all related customer records.

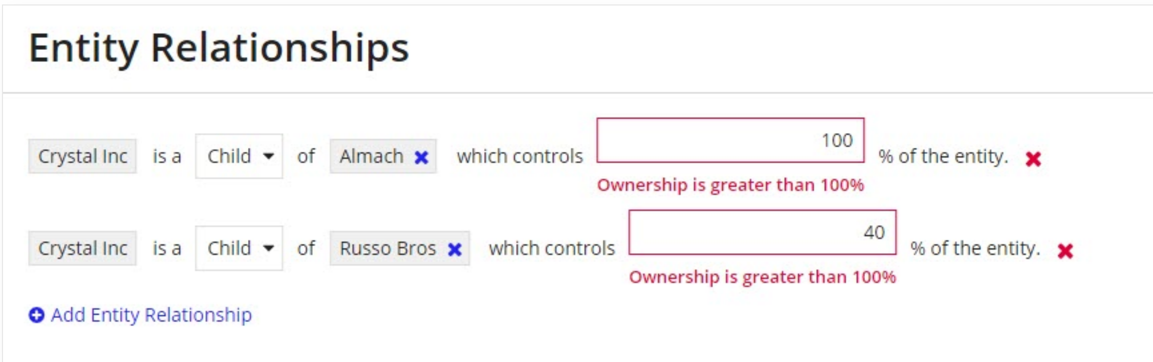
For example, if the Almach customer record is updated to indicate that it is a parent of Crystal Inc.:

The Crystal Inc customer record is automatically updated to reflect that it is a child of Almach:

Smart relationship validations

Smart validations check the logic of your relationships. The entity relationship section includes the following validations.

- The percentage of control for all child relationships must not exceed 100%.



- You cannot create circular relationships where one customer is both a parent and a child of the same company.

- You cannot create a duplicate relationship where the same company is listed more than once as a child or more than once as a parent.

Update customer risk score

A customer's **Risk Score** is shown on the **Summary** tab of the customer record. The score is a numerical value with a corresponding high, medium, or low classification.

Update risk score manually

To update a customer's risk score:

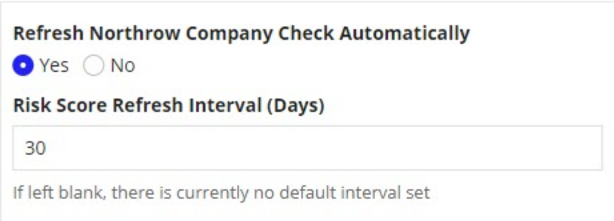
1. On the **Basic Info** tab for a customer, click **EDIT**.
2. Enter the updated risk score.
3. Click **UPDATE CUSTOMER DETAILS**.

When the risk score changes a customer flag will be generated.

Update risk score with Northrow

If a Northrow integration is set up, the risk score can be set and refreshed automatically or manually.

When creating or editing a customer, a user can select whether or not to automatically refresh the Northrow company check. If a user selects to refresh automatically, they can then set the number of days between automatic refreshes. If the refresh interval is left blank, the default interval is used, which can be changed by updating the Northrow properties in the System Administration Center.



A user can manually check for changes to the risk score or alerts from the customer record by clicking the refresh button. The refresh button is not available if the Northrow integration is disconnected.

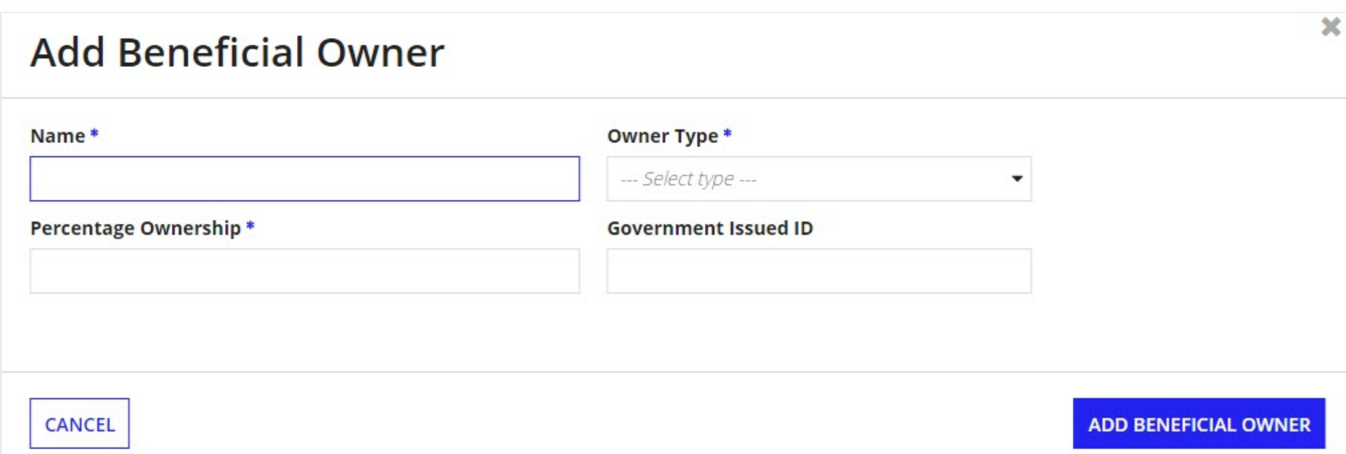
Additionally, when the Northrow risk score is gathered, Northrow also provides a detailed risk score report. Once generated, the report is available for download from the **DOCUMENTS** tab of the customer record.

Update beneficial owners

On the **Basic Info** tab for a customer or during customer creation, **Beneficial Owners** can be added manually or can be refreshed using Dun & Bradstreet if the integration is set up.

Add beneficial owners manually

1. Click **Add Beneficial Owners**.
2. Enter the beneficial owner details.
    - The default owner types that can be selected are: **Entity** and **Person**.
        - **Note:** These values can be updated in the `AS_FS_R_DATA` table. See Modifying Dropdown Lists for instructions on how to update these values.
3. Click **ADD BENEFICIAL OWNER**



Refresh beneficial owners using Dun and Bradstreet

If the Dun and Bradstreet integration is turned on, you can enter a DUNS number, which is a customer identifying ID for the Dun and Bradstreet external system. To pull back beneficial owner information from Dun and Bradstreet, the DUNS number is required.

duns_number.jpg

Once the DUNS number is entered, a refresh button will enable in the beneficial owners section. Clicking this will call the Dun and Bradstreet system and display any beneficial owners from that external system.

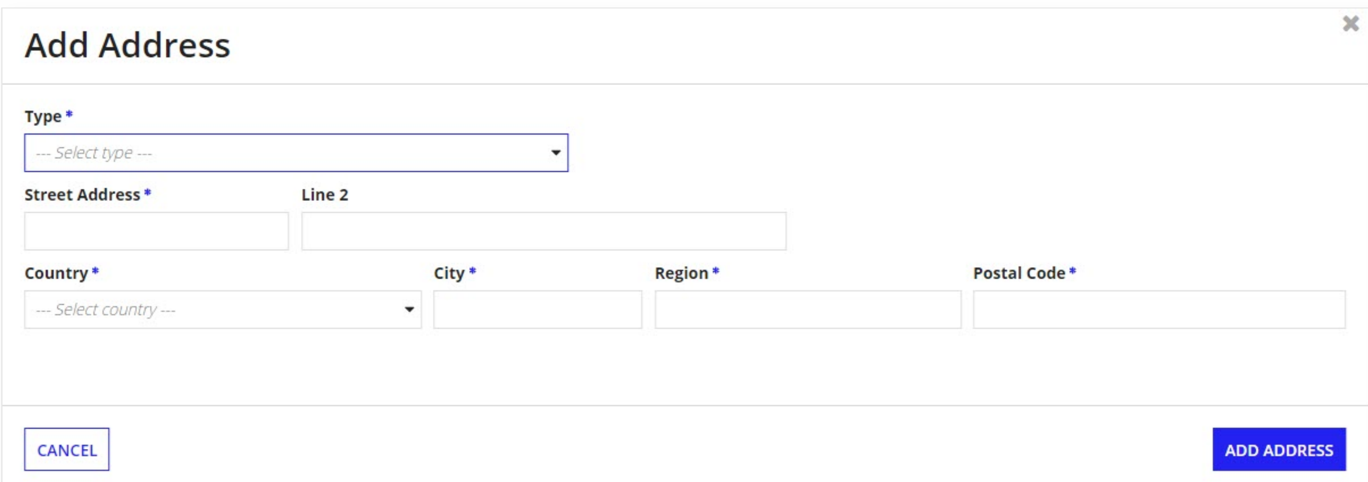
Additionally, you can click the edit icon to edit an existing beneficial owner, or click the trashcan icon to delete a beneficial owner.

Update addresses

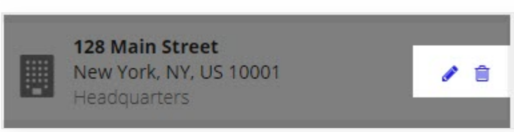
On the **Basic Info** tab for a customer or during customer creation, **Addresses** can be added.

To add a new address:

1. Click **Add Address**.
2. Enter the address details.
   - The default address types that can be selected are: **Headquarters**, **Home**, and **Work**.
     - **Note:** These values can be updated in the `AS_FS_R_DATA` table. See Modifying Dropdown Lists for instructions on how to update these values.
3. Click **ADD ADDRESS**.



Additionally, you can click the edit icon to edit an existing address, or click the trashcan icon to delete an address.

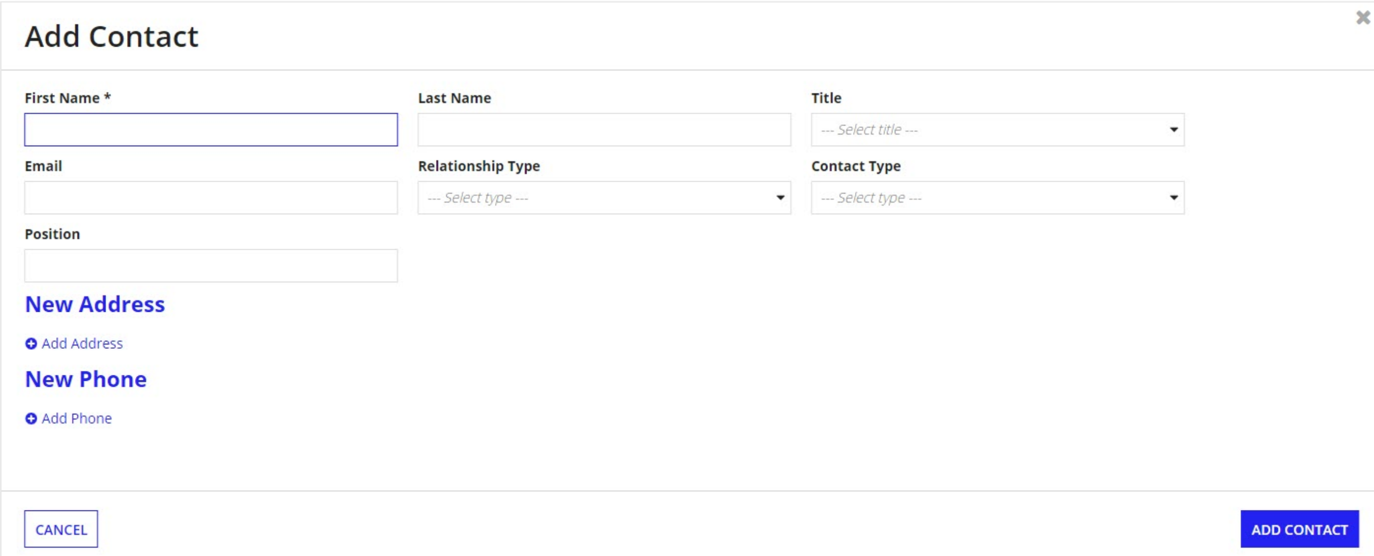


Update contacts

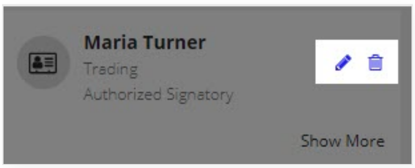
On the **Basic Info** tab for a customer or during customer creation, **Contacts** can be added.

To add a new contact:

1. Click **Add Contact**.
2. Enter the contact details.
   - The default relationship types that can be selected are: **Trading** and **Counterparty**.
   - The default contact types that can be selected are: **PM** (portfolio manager), **CIO** (chief information officer), and **Authorized Signatory**.
     - **Note:** These values can be updated in the `AS_FS_R_DATA` table. See Modifying Dropdown Lists for instructions on how to update these values.
3. To add a new phone number for the contact, click **New Phone**. Enter the phone number details.
4. To add a new address for the contact, click **New Address**. Enter the address details.
5. Click **ADD CONTACT**.



Additionally, you can click the edit icon to edit an existing contact, or click the trashcan icon to remove a contact.

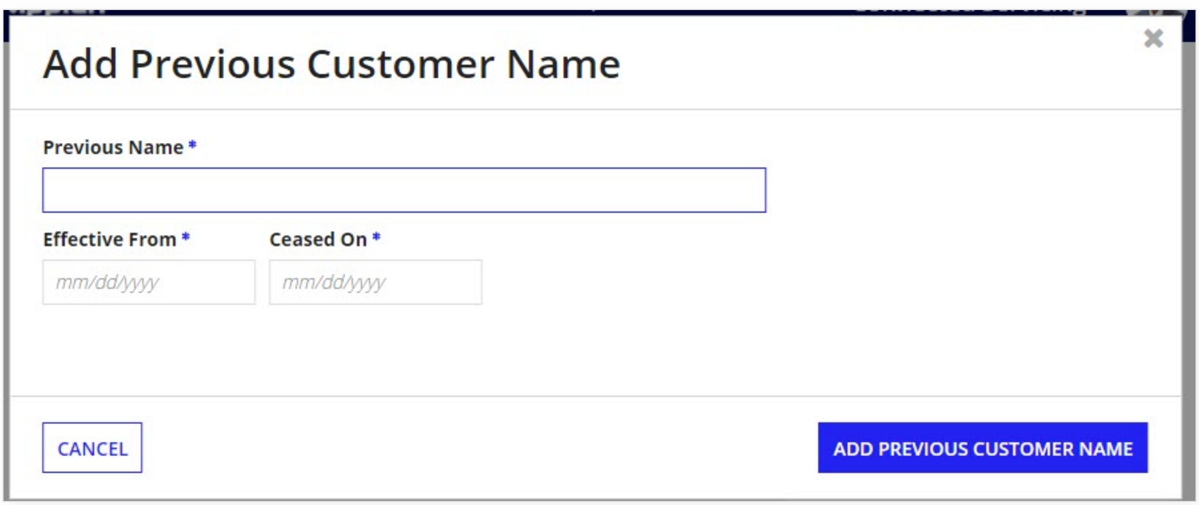


Update previous customer names

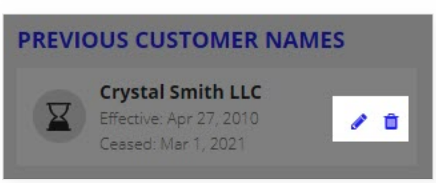
On the **Basic Info** tab for a customer or during customer creation, **Previous Customer Names** can be added.

To add a new previous customer name:

1. Click **Add Previous Customer Names**.
2. Enter the **Previous Name**, **Effective From** date, and **Ceased On** date.
   - The **Ceased On** date must be in the past and after the **Effective From** date.
3. Click **ADD PREVIOUS CUSTOMER NAME**.



Additionally, you can click the edit icon to edit an existing previous customer name, or click the trashcan icon to remove a previous customer name.

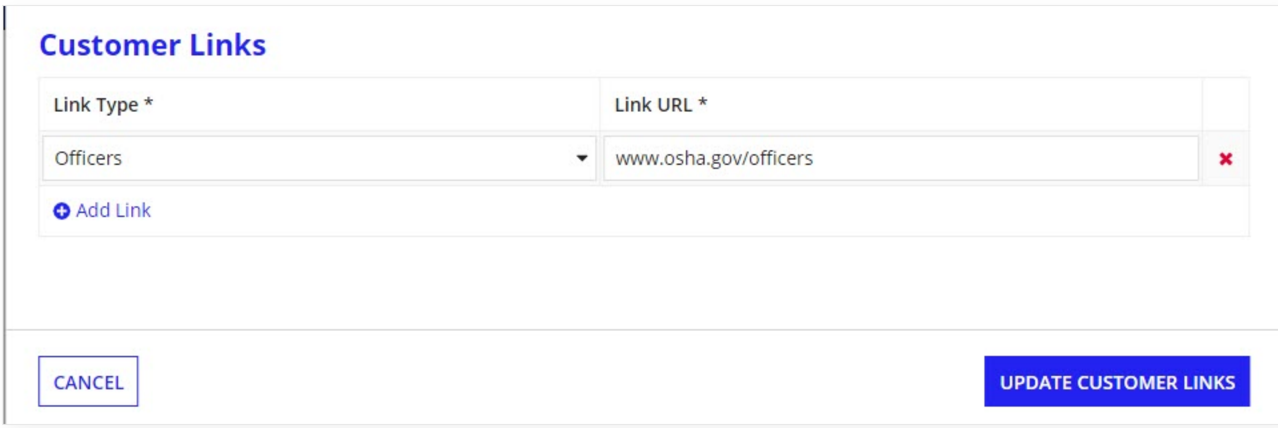


Update customer links

On the **Basic Info** tab for a customer or during customer creation, **Customer Links** can be added.

To add or update a customer links:

1. Click **Add Links**.
2. Click **Add Link** again.
3. Select the **Link Type** and **Link URL**.
    - **Note:** You may only have one link per link type.
    - **Note:** The **Link Type** values can be added in the `AS_FS_R_DATA` table. See Modifying Dropdown Lists for instructions on how to add these.
4. To add an additional link, click **Update Link** again. To delete a relationship, click the red **x**. When all links are added click **UPDATE CUSTOMER LINKS**



Viewing Reports

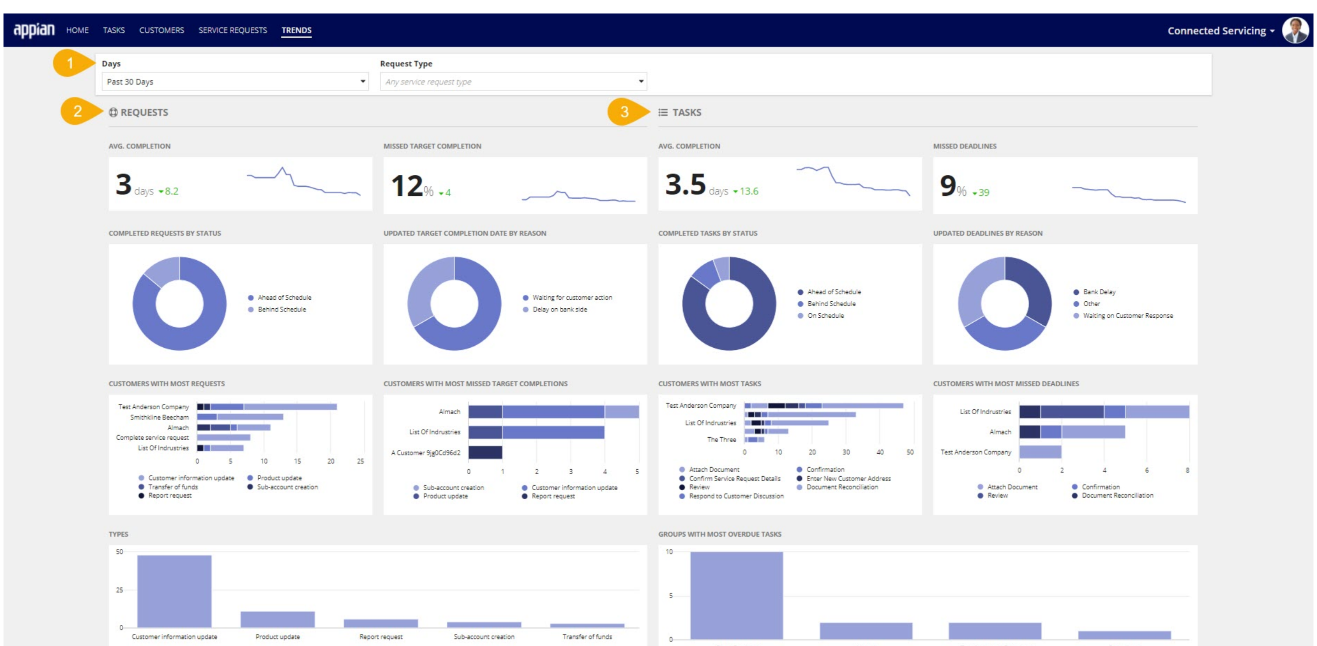
Introduction

The trend report dashboard allows managers and other users to monitor task and request completion performance. This page describes how managers can view these trends and metrics to see how the organization is performing in these specified areas.

Using the trends dashboard

The trends dashboard is broken down into 3 main parts:

1. The filters
2. The service request reports
3. The task reports

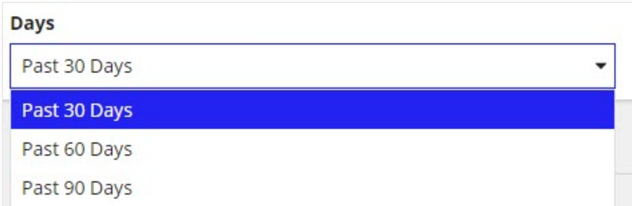


Trends dashboard filters

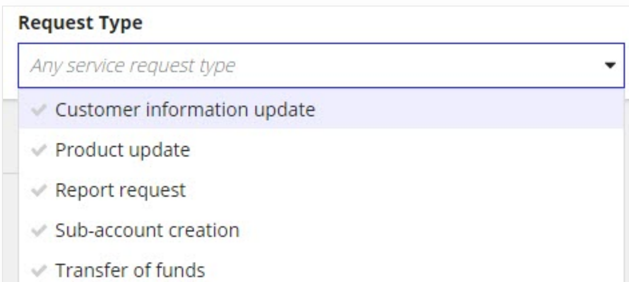
A manager can use the two filter options to change the data that is displayed on the dashboard. Changing either one of the filters will apply this filter to all charts that are displayed.

The two available filters are:

- Time period - the user can select to look at the data over a 30, 60, or 90 day historical time period. By default, the dashboard will use a time period of the past 30 days.



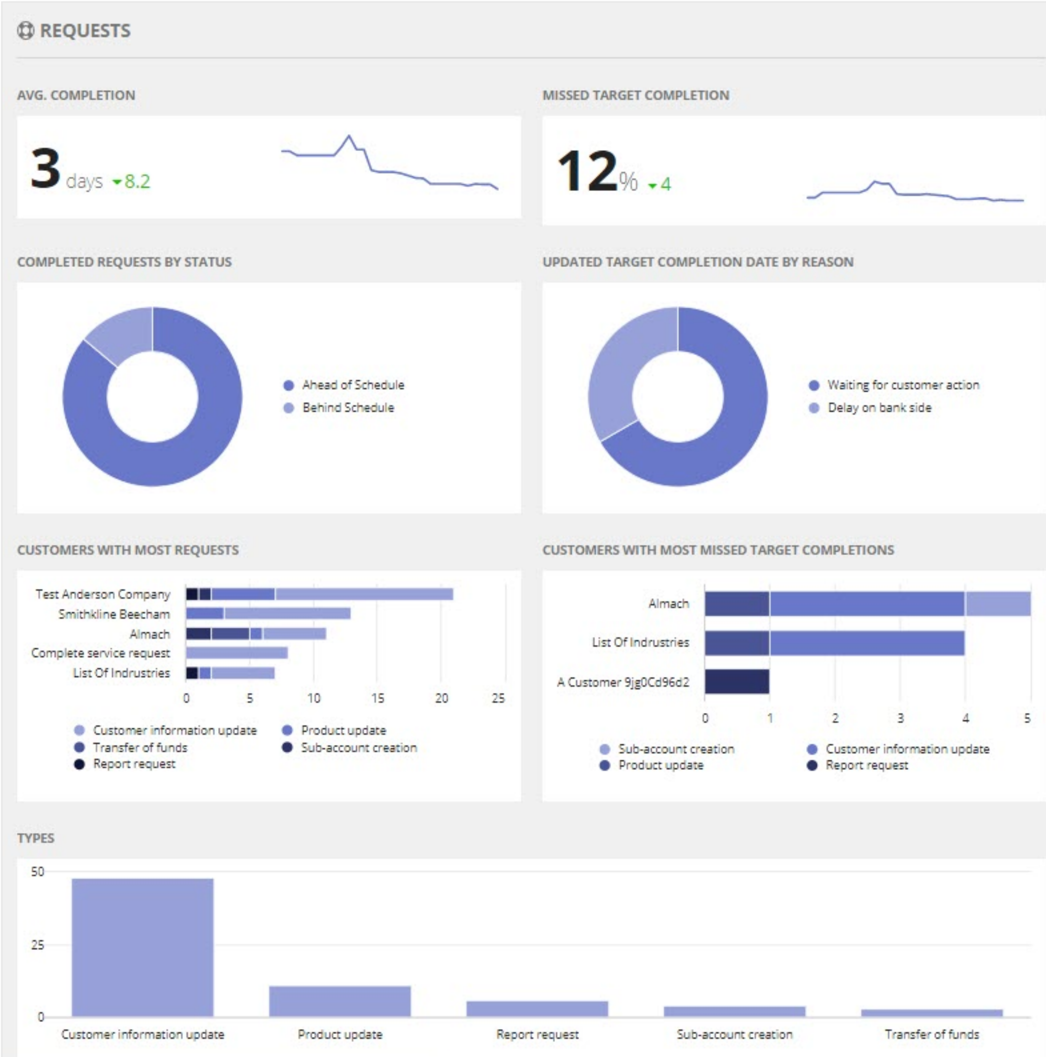
- Request type - the user can select to only look at service requests of specific types. By default, all of the service request types will be shown.



Request reports

The charts and figures on the left hand side of the trends page give insight into requests. Some questions that can be answered by this request data are:

- How long are service requests taking to complete?
- Are service requests being completed on time?
- Why have target completion dates changed?
- Which customers have the most service requests?



Average completion

The average completion per servicing request section shows the manager data about how long it is taking service requests to complete.

In this section you see:

- The number of days that a service request takes to complete in the past 30, 60, or 90 days.
- A line chart showing the average number of days per service request over the past 30, 60, or 90 days.
- The percent change of the average number of days as compared to 30, 60, or 90 days ago.
  - The percentage will appear green when the average length of a service request is trending downward.
  - The percentage will appear red when the average length of a service request is trending upward.

Missed target completion date

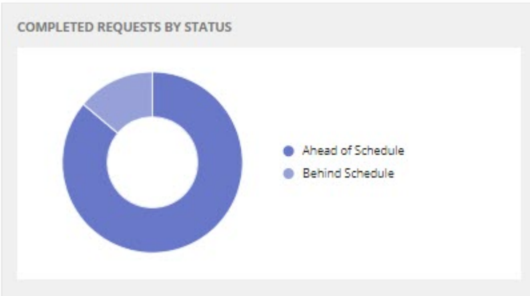
The missed target completion date section shows the manager data about how many service requests have missed their target completion dates.

In this section you see:

- The percentage of service requests that have missed their funding date over the past 30, 60, or 90 days.
- A line chart showing the percentage of service requests that have missed their funding dates over the past 30, 60, or 90 days.
- The percent change of the percentage of service requests that missed funding date compared to those 30, 60, or 90 days ago.
    - The percentage will appear green when the percentage of missed target completion dates is trending downward.
    - The percentage will appear red when the percentage of missed target completion dates is trending upward.

Completed service requests by status

The completed service requests by status chart shows the manager data about when service requests are being completed relative to their target completion dates.



On this chart you can:

- View service requests grouped by whether they were completed ahead of schedule, on schedule, or behind schedule.
- Drill down into a specific segment of service requests to view further information about those service requests.

Target completion date changes by reason

The Target Completion Date By Reason chart shows which reasons users have given when they changed a target completion date for a service request.

On this chart you can:

- View the reasons that service requests have had their target completion dates changed.
- Drill down into a specific specific change reason to view further information about those servicing requests.

Customers with most requests

The customer with most requests chart shows the top 5 customers that have the most service requests grouped by which service request type.

On this chart you can:

- View customers with most service requests over the selected time period.
- Drill down into a customer to view further information about the servicing requests.

Customers with most missed target completions

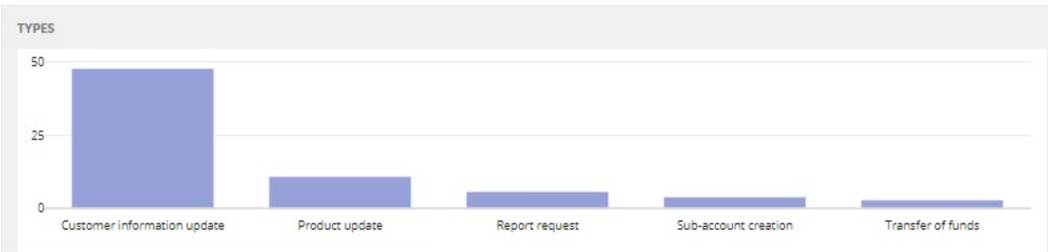
The Customers with most missed target completions chart shows servicing requests for the customers that have the most service requests with a missed target completion date.

On this chart you can:

- View customers with most service requests that had the most missed target completion dates over the selected time period.
- Drill down into a customer to view further information about the servicing requests.

Completed requests by type

The completed requests by type chart shows servicing requests grouped by which service request type.



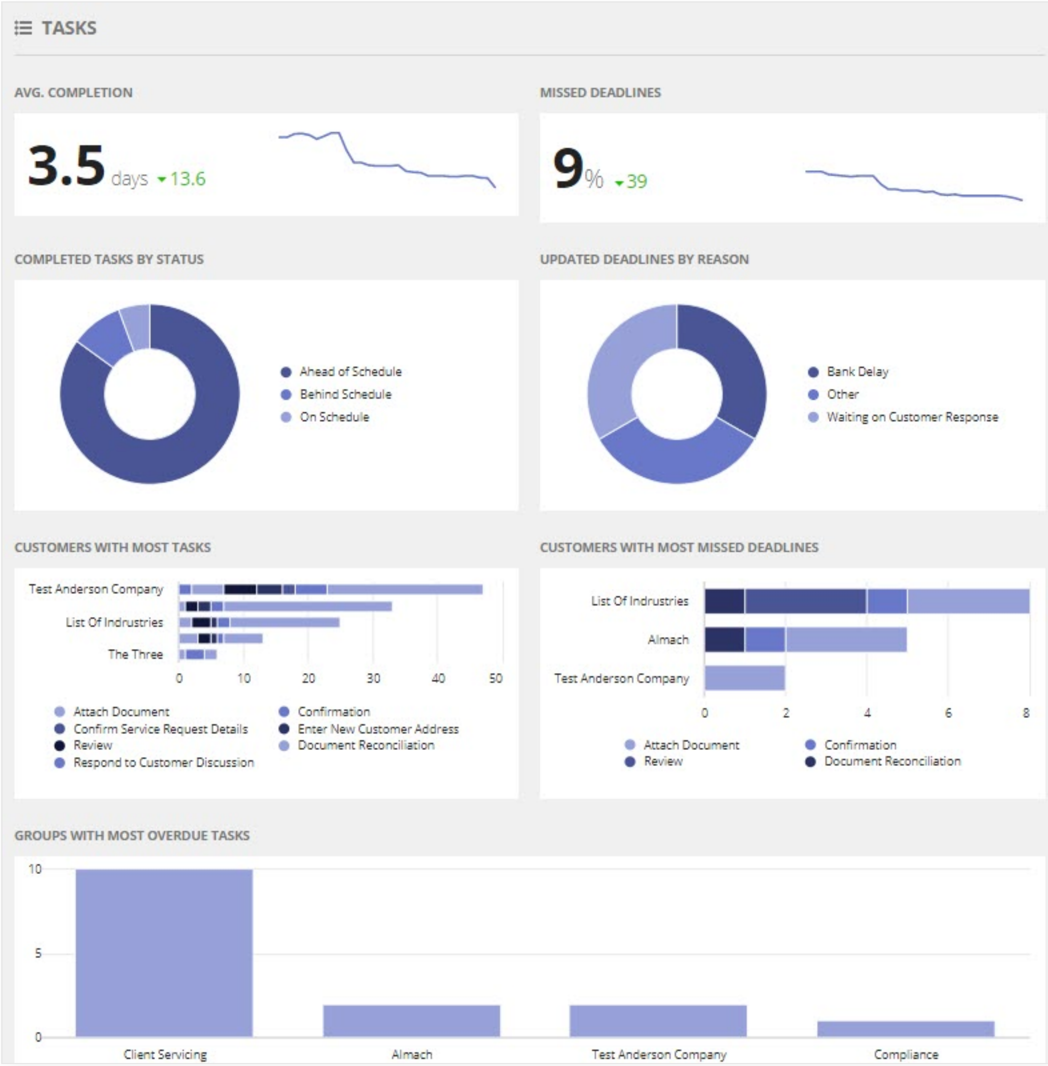
On this chart you can:

- View servicing requests by type.
- View which servicing requests were completed ahead of schedule, on schedule, or behind schedule in each region.
- Drill down into a servicing requests type to view further information about the servicing requests of that type.

Task reports

The charts and figures on the right hand side of the trends page give insight into tasks. Some questions that can be answered by this task data are:

- Are tasks being completed on time?
- Why are tasks dues dates being changed?
- Which customers are being affected most by overdue tasks?
- Which group is responsible for the most overdue tasks?



Average completion

The average completion per task section shows the manager data about how long it is taking to complete tasks

In this section you see:

- The number of days that a task takes to complete in the past 30, 60, or 90 days.
- A line chart showing the average number of days to complete tasks over the past 30, 60, or 90 days.
- The percent change of the average number of days to complete tasks to 30, 60, or 90 days ago.
    - The percentage will appear green when the average duration of a task is trending downward.
    - The percentage will appear red when the average duration of a task is trending upward.

Missed task deadlines

The missed task deadlines section shows the manager data about how many tasks have missed their due dates.

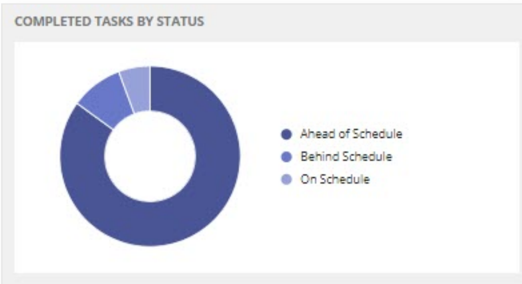
In this section you see:

- The percentage of tasks that were late over the past 30, 60, or 90 days.

- A line chart showing the percentage of tasks that were late over the past 30, 60, or 90 days.
- The percent change of the percentage of tasks that were late compared to those 30, 60, or 90 days ago.
    - The percentage will appear green when the percentage of overdue tasks is trending downward.
    - The percentage will appear red when the percentage of overdue tasks is trending upward.

Completed tasks by status

The completed tasks by status section shows the manager data about when tasks are being completed relative to their due dates.



On this chart you can:

- View tasks grouped by whether they were completed ahead of schedule, on schedule, or behind schedule.
- Drill down into a specific group of tasks to view further information about those tasks.

Updated deadlines by reason

The Updated Deadline by Reason chart shows which reasons users have given when they changed a task due date.

On this chart you can:

- View reasons that task due dates have changed.
- Drill down into a specific change reason to view further information about those tasks.

Customer with most tasks

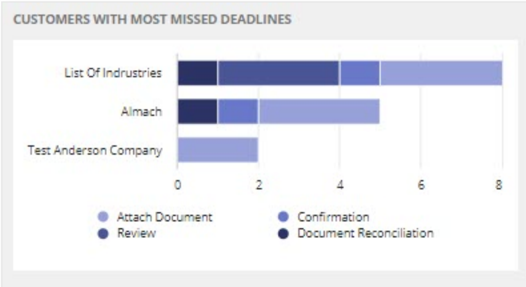
The Customer with Most Tasks chart shows the top 5 customers with the most completed tasks.

On this chart you can:

- View the tasks by type.
- Drill down into a specific customer to view further information about those customers' tasks.

Customers with most missed deadlines

The Customers with Most Missed Deadlines chart shows the top 5 customers with the most missed task due dates.

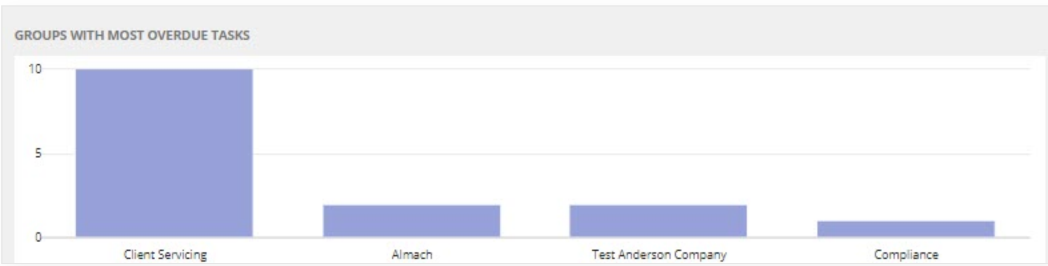


On this chart you can:

- View the tasks by type.
- Drill down into a specific customer to view further information about those customers' tasks.

Completed tasks status by group

The Group with the most overdue task chart shows which groups within the system are missing tasks the most deadlines.



On this chart you can:

- View overdue tasks by group.
- Drill down into a group to view further information about the tasks.

Using the Customer Portal

Introduction

Connected Servicing provides a self-service portal for your customers. This portal provides a centralized location that allows them to be in control of their data, easily complete the tasks they need, and request updates. They can perform all of these tasks all while keeping your internal team informed of any changes.

Access the customer portal

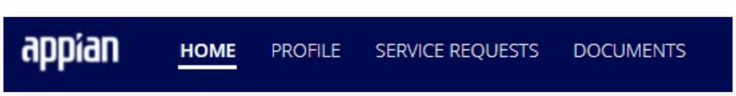
To access the customer portal, customers must have an Appian user account and be assigned to a customer group. It is imperative to maintain strict security to the customer portal, therefore, a user can only be assigned to one customer group at a time.

Internal users with access to the Connected FS settings site will be able to create customer users and add them to the correct customer group.

View the customer portal

A customer can access 4 tabs from the customer portal:

1. Home
2. Profile
3. Service Requests
4. Documents

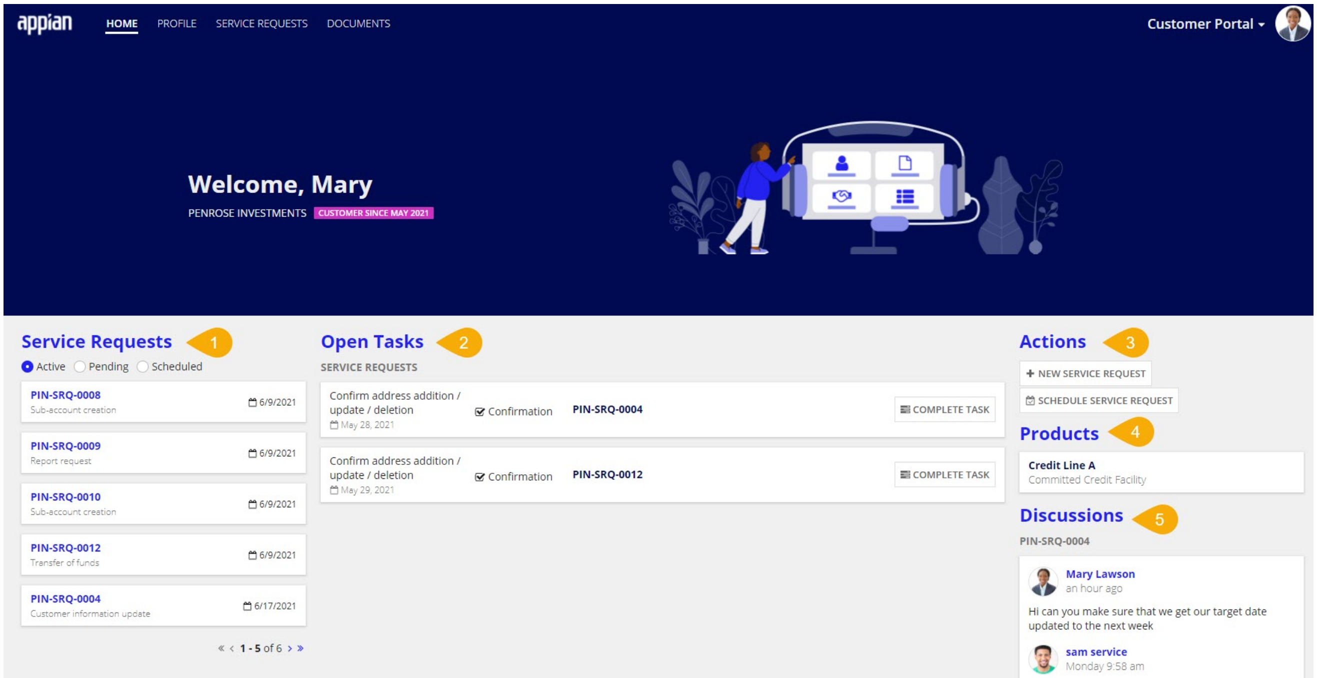


Home

On the **HOME** page, the customer can view a list of the customer's service requests, complete any tasks assigned to them, and view recent discussions with the internal client services team.

The following information is listed on the home page:

1. **Service Requests**: The open service requests for the customer.
2. **Open Tasks**: Outstanding tasks assigned to the customer for completion.
3. **Actions**: Actions the customer users can take.
4. **Products**: The list of products for the customer.
5. **Discussion**: The most recent comments on the most recently active discussion threads between the customer and the internal client services team.

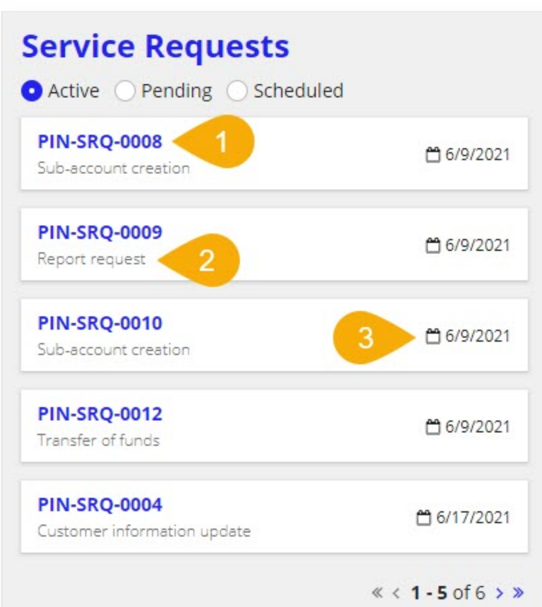


Service Requests

Service requests are listed in order by the target completion date, starting with the soonest. A user can choose to view either **Active**, **Pending**, or **Scheduled** service requests.

Each service request listed shows:

1. Service request name.
   - **NOTE**: clicking on the service request name will open up the service request summary.
2. Service request type.
3. Target completion date.

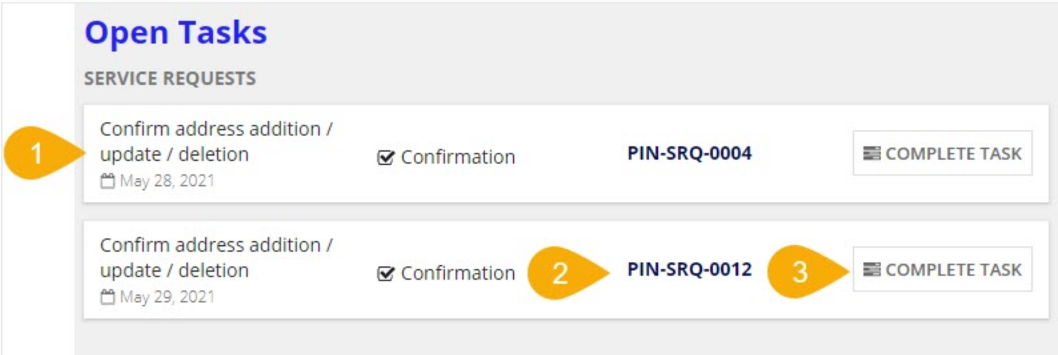


Open tasks

Customers will see any tasks assigned to them on the customer portal and they can complete tasks directly, creating a more streamlined service request process. When a task is assigned to a customer, the customer will receive an email notifying them of the task with a link to the customer portal.

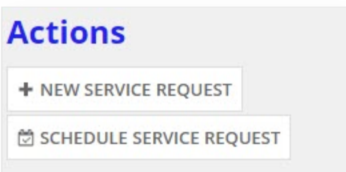
On the open task list, a customer can:

1. View task details.
2. View the service request the task is for.
3. Complete a task.



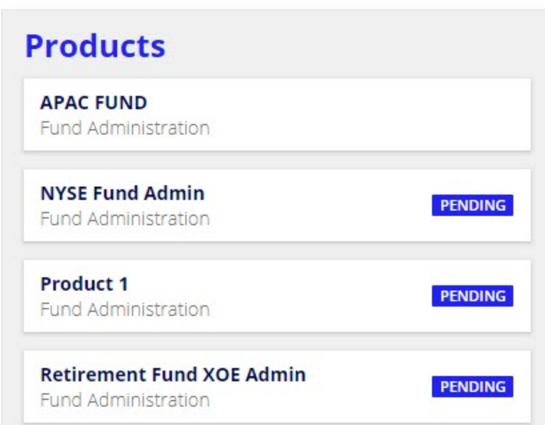
Actions

Any actions that customers can perform such as **NEW SERVICE REQUEST** or **SCHEDULE SERVICE REQUEST** will be listed in the Actions section.



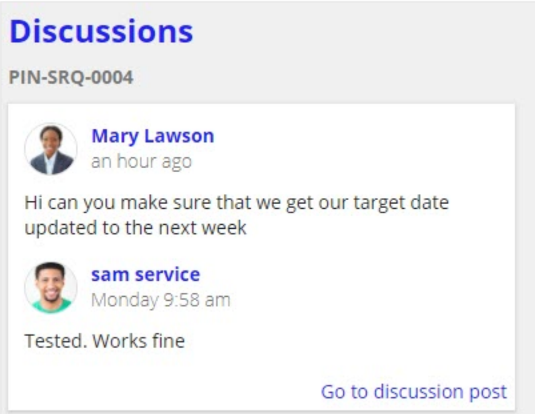
Products

Products associated with the customer will be listed under **PRODUCTS**. Products that have changes pending from open service requests will have a **PENDING** tag next to the product name. Hovering over the **PENDING** tag will show the user which service request the change was requested on.



Discussions

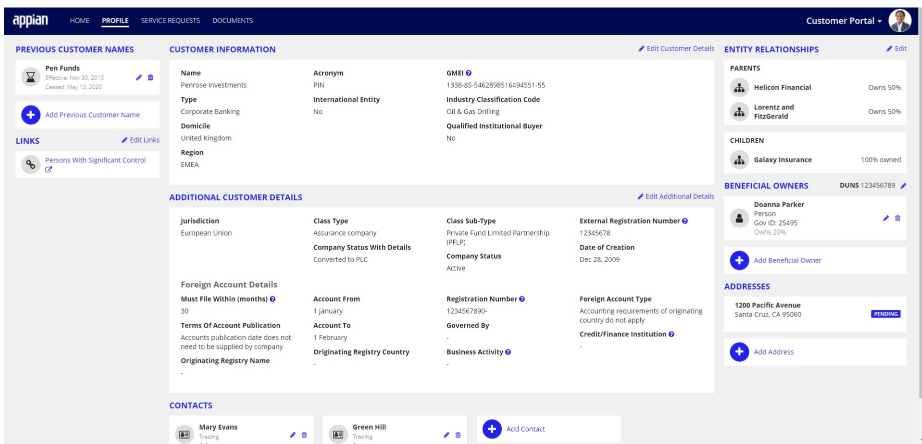
The discussion section allows customers to view the latest comments from the most recently active discussion for servicing requests. To view past comments or view the associated service request in further detail, a user can click **Go to discussion post**. This discussion section allows onboarders to have full context and keep an audit of customer interaction directly on the onboarding itself.



When a customer adds a discussion post, the primary owner of the onboarding will receive a task to respond to the discussion. When the onboarder responds, the response will be available on the discussion feed.

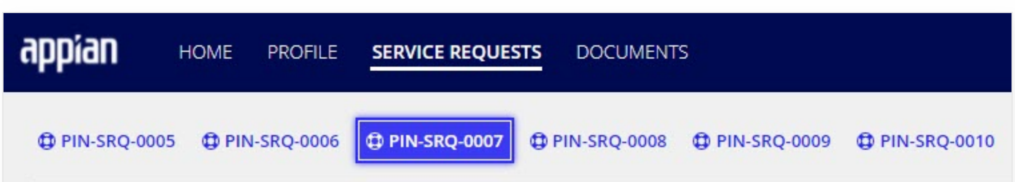
Profile tab

The **PROFILE** tab has all of the information related to the customer. Customers can navigate to this page to add, remove, or edit their customer data.



Service Requests tab

The service request tab shows all service requests for the customer. Use the service request tabs to navigate between each of the service requests. Open service requests will be listed in order by target completion date starting with the soonest first. Canceled and completed service requests will be listed after any open service requests.

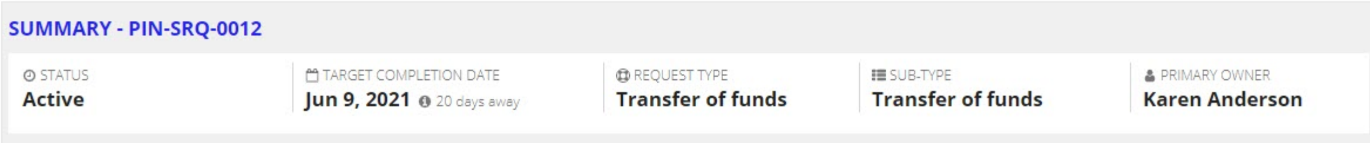


Service request summary

After a service request is selected, all of the information on the page relates to that single service request.

The **Summary** header lists key information about the service request including:

- Status
- Target Completion Date
- Request type
- Sub-type
- Primary Owner



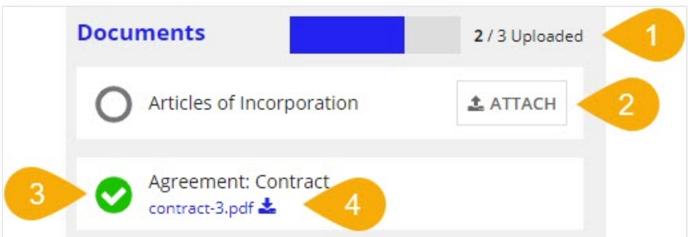
Upload documents

Customers can upload documents directly to a service request. This eliminates the need to send documents back over email, which can easily cause confusion.

When a customer uploads a document, the document is classified for accuracy. If Connected Servicing matches the document type correctly, the document is accepted and is reflected on the customer portal with a green ✔. The document that satisfies the document requirement will be available for download.

On the document list of a selected onboarding, a customer can:

1. View the number of outstanding required documents.
2. Attach a document.
3. View the completion status for a requirement document.
4. Download an accepted document.

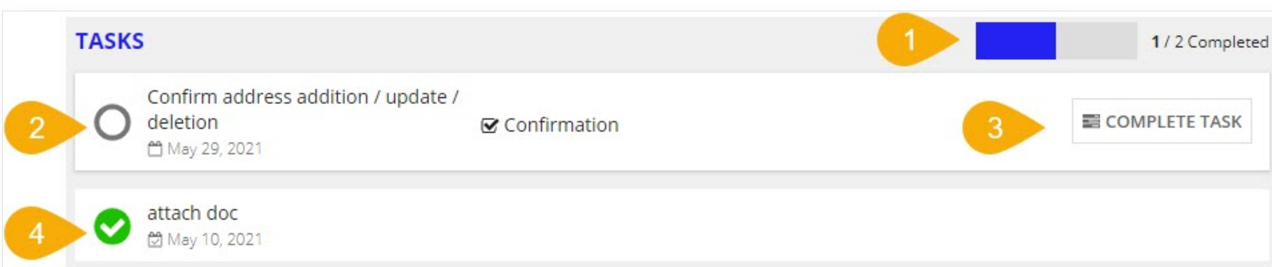


Complete tasks

Customers can complete tasks directly from the customer portal, creating a more streamlined service request process. When a task is assigned to a customer, the customer will receive an email notifying them of the task with a link to the customer portal.

On the task list of a selected service request, a customer can:

1. View the number of outstanding tasks.
2. View task details.
3. Complete a task.
4. View completed tasks.



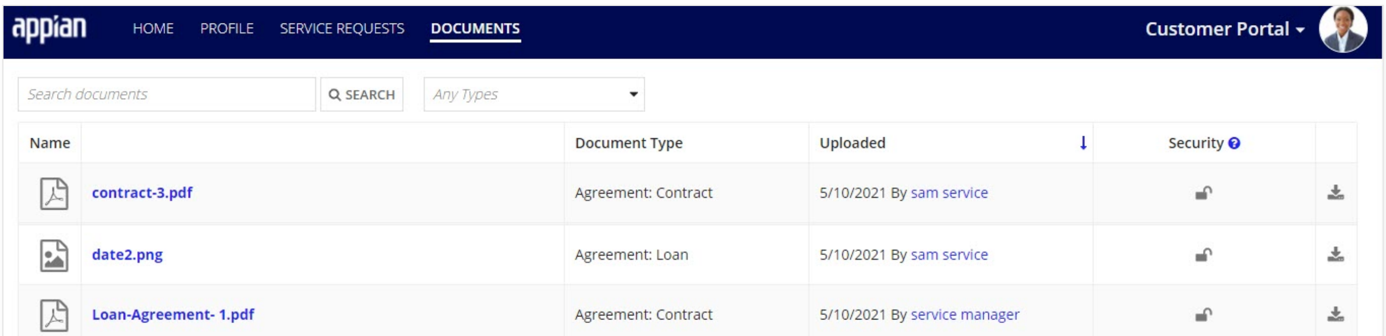
Add discussion post

The service request discussion thread allows customers to send comments and requests to the internal client servicing team. This allows the client servicing team to have full context and keep a running log of customer interaction directly on the service request itself.

When a customer adds a discussion post, the primary owner of the service request will receive a task to respond to the discussion. When the user responds, the response will be available on the discussion feed.

Documents tab

When a document is uploaded, the customer is able to access it from the **DOCUMENTS** tab on the customer portal. In addition, customers can search for a document or filter by the document type from the **DOCUMENTS** tab. All available documents can be downloaded.

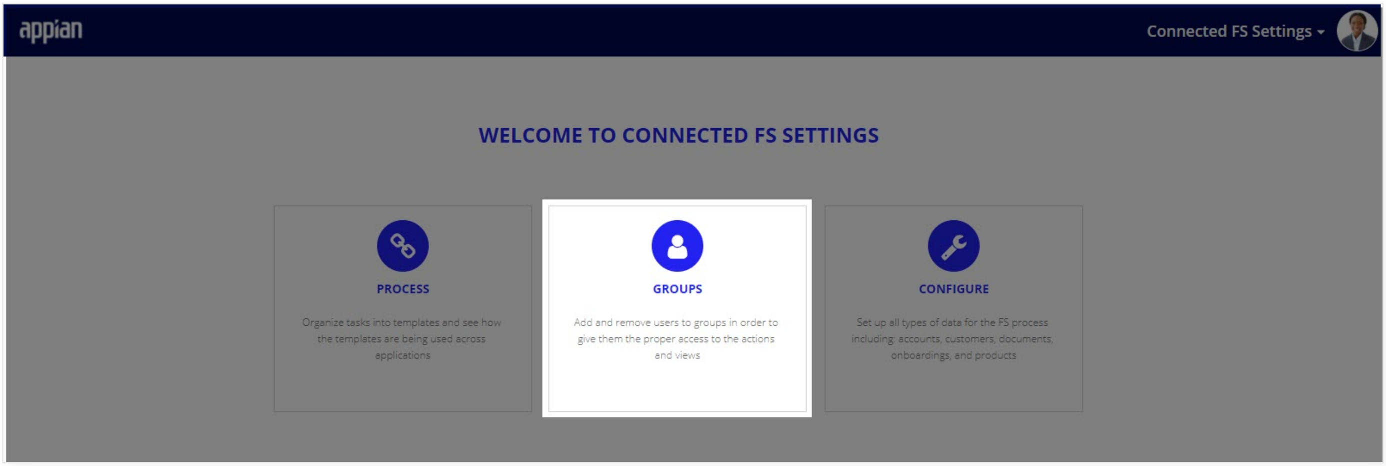


Clicking on a document name will show a preview of the document along with additional details that can be updated.

Setting Up Groups

Introduction

Managing organizational changes can be a big pain point for many organizations. New team members or team members with new responsibilities need to quickly have access to the tools they need to do their jobs. To ensure security, departing team members need to have their access revoked in a timely manner. The Connected FS Settings site in Appian Connected Servicing allows business users with the appropriate access to quickly make the changes needed to keep business running securely.



If you need to add new business or security groups, or modify group membership using Appian Designer, see Modifying Groups.

What are business groups?

Only business groups are able to be modified from Connected FS Settings. So what is a business group? A business group is a group that represents the different business roles that will interact with the application.

For example, sales team members who are involved in service requests will be in the **Sales** business group and managers on the legal team who are involved in service requests will be in the **Legal Department Heads** business group.

This allows you to put certain teams into security groups to allow access to specific parts of the application. For example, only members of the **Client Servicing** and **Client Onboarding** groups have actions to create new service requests from the Home page.

See Group Reference Page for more information on what groups provide what access in Connected Servicing.

Customer groups

Customer groups are a special type of business groups. Customer groups allow access to the **Customer Portal** for external users. In order to ensure customers can only see their data and no other customer data, a user may only be added to one customer group at a time.

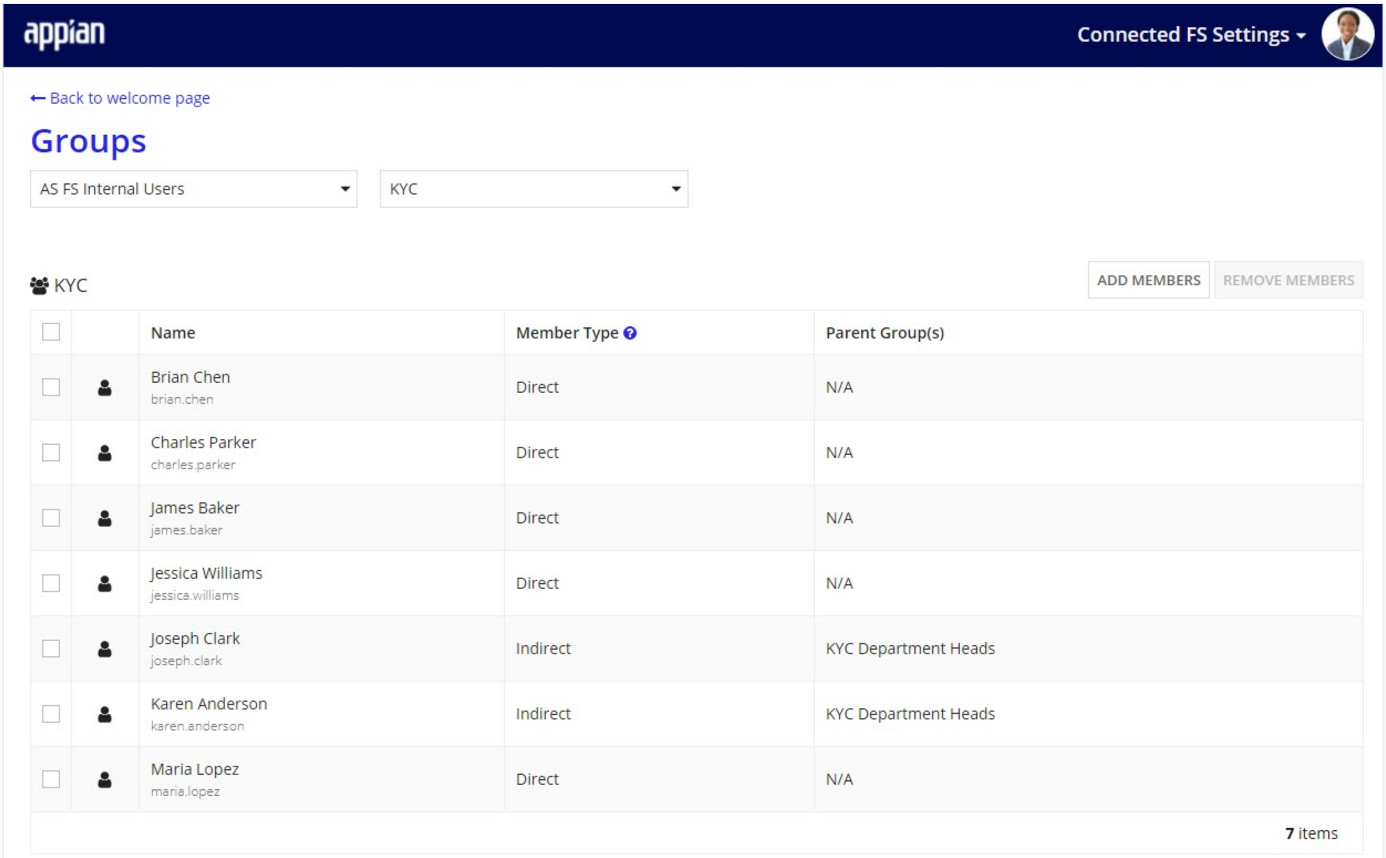
A customer group is automatically created when a customer is created. Therefore, in the group management tool, there will be one group for every customer.

View group members

To view current group members:

1. Access the Connected FS Settings site and click **Groups**.
2. In the group picker, select the group type.
    - **Note**: The group type aligns with the wrapper groups that are defined in Group Reference Page.
3. Select the business group that you would like to view.

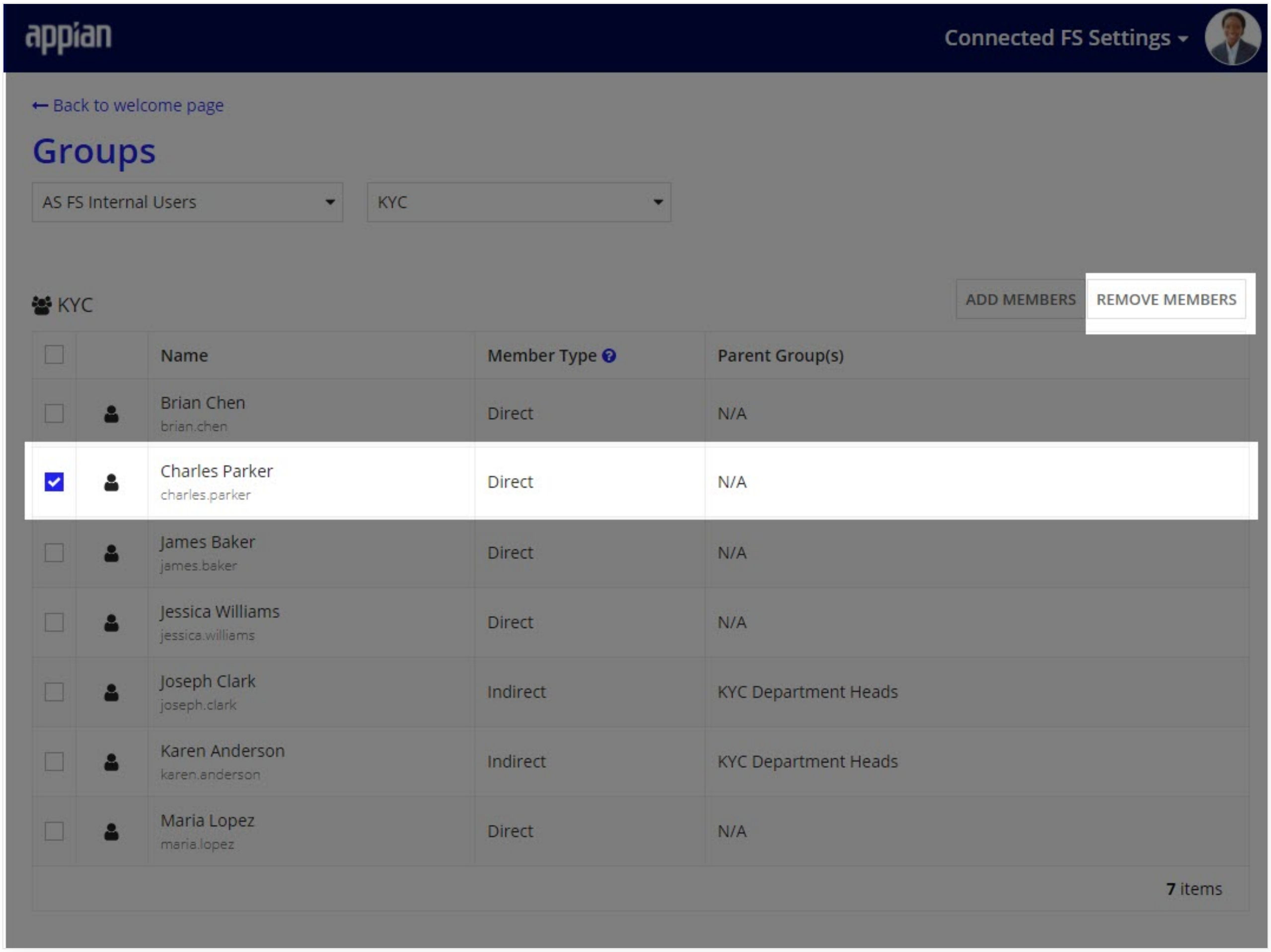
The group members display. You can see if a user is a **Direct** member, which means they have been added directly to the group, or an **Indirect** member, which means they are a member of a subgroup. If the user is an **Indirect** member, their subgroup will display in the **Parent Group(s)** column.



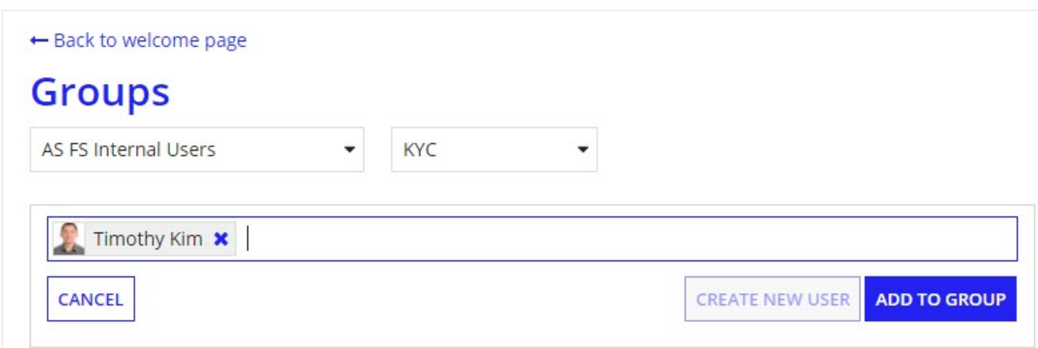
Manage group membership

To update group membership:

1. On the Groups page, select the group that you would like to update. See Viewing group members for instructions.
2. To remove a member, select the checkbox next to their name and click **REMOVE MEMBERS**.
    - **Note**: If the member is an indirect member of the group, you will not be able to remove them from the group. You must remove them from the parent group. For example, a member of the Back Office Department Heads group is an indirect member of the Back Office group. To remove them from the Back Office group, you must remove them from the Back Office Department Heads group.



3. To add a member, click **ADD MEMBERS**. Use the picker to find the member(s) you would like to add, then click **ADD TO GROUP**.



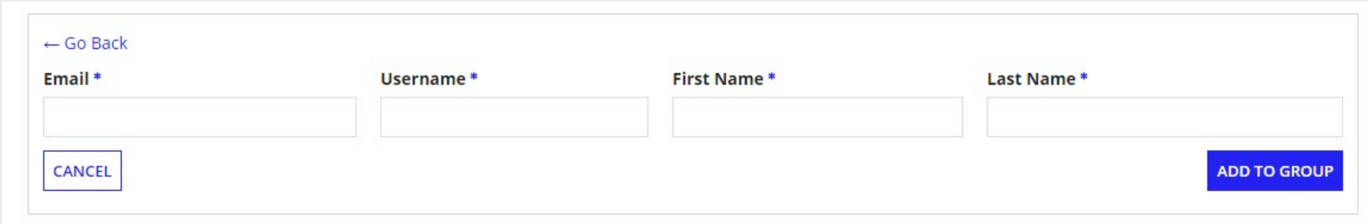
When the users refresh the site, their membership will be updated.

Create a new user

If a user needs an account, a business user can create one from the group management tool.

To create a new user:

1. Access the Connected FS Settings site and click **Groups**.
2. In the group picker, select the group type.
3. Select the business group that you would like to add the user to.
4. Click **ADD MEMBERS**.
5. Click **CREATE NEW USER**.
6. Enter the **Email**, **Username**, **First Name**, and **Last Name**.
    - **Note:** Username is case sensitive and must be unique.
7. Click **ADD TO GROUP**.



Accessing Connected FS Settings

Introduction

Connected FS (Financial Services) Settings is a separate site in the Connected Servicing application. It allows business users to:

- Organize tasks for service request processes.
- Manage group membership.
- Configure important service request values

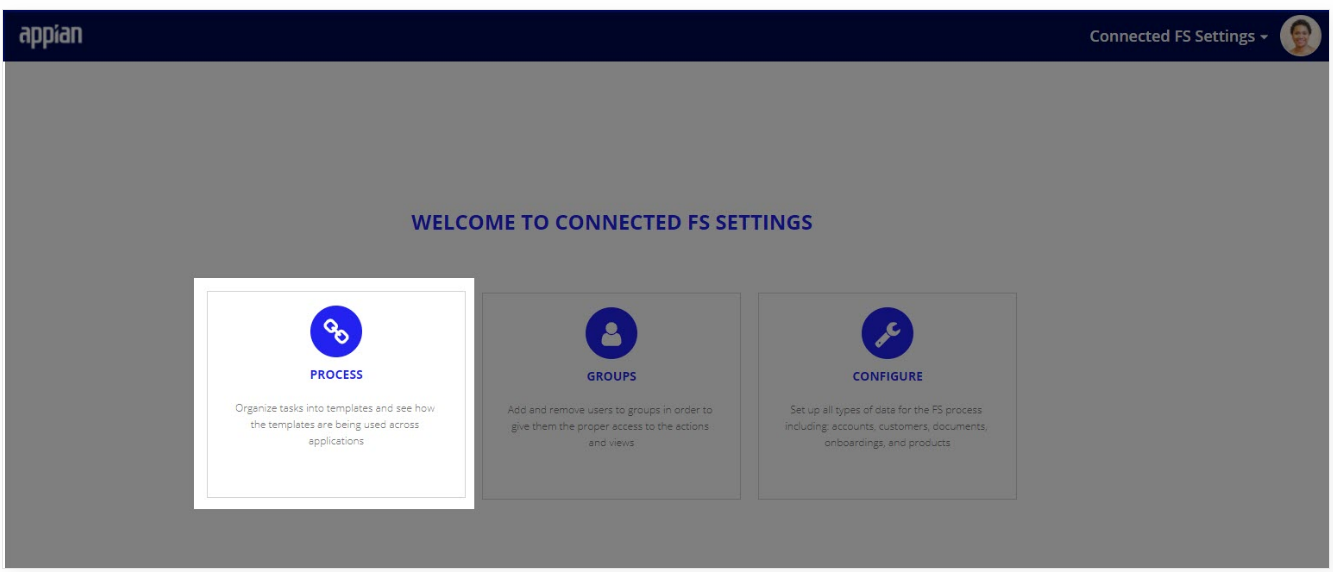
Only business users with the appropriate group membership are able to access this site. This ensures that only a select few have access to sensitive processes and information.

This page provides instructions and prerequisites for accessing the Connected FS Settings site.

Accessing the Connected FS Settings site

To access the Connected FS Settings site:

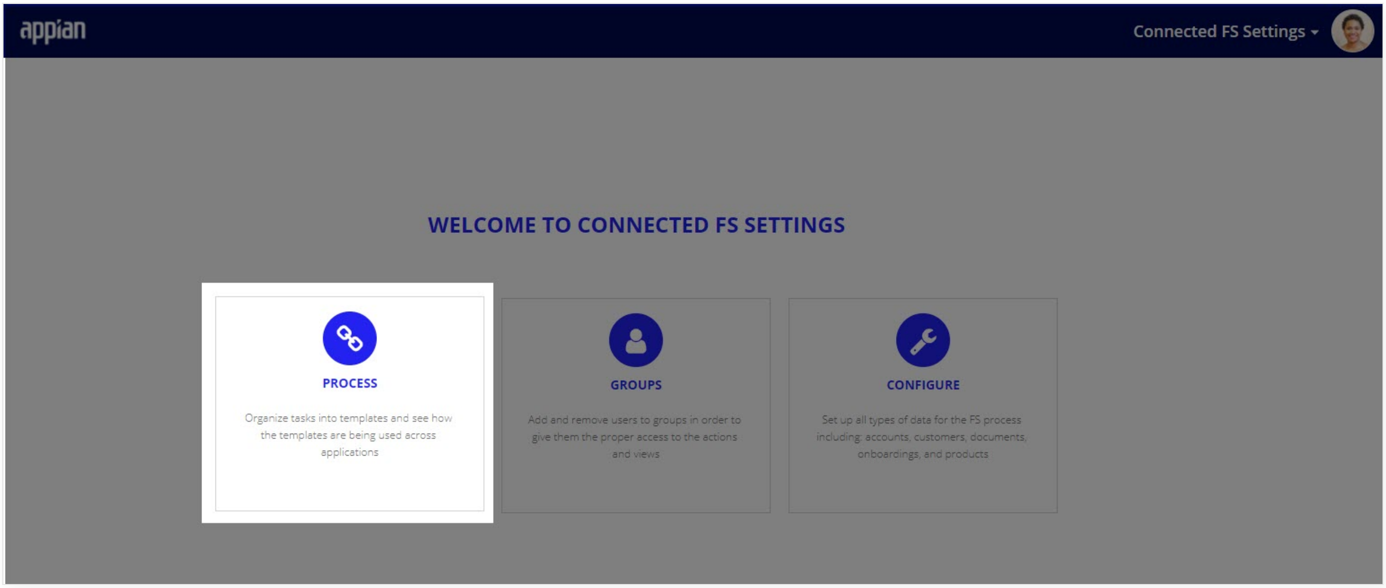
1. Make sure you are in the appropriate security groups. See the Groups Reference Page for more information about security groups.
    - To access the Connected FS Settings site to manage categories, tasks, and templates, make sure you are in the `AS FS Manage Processes` group.
    - To access the Connected FS Settings site to configure service requests make sure you are in the `AS FS Access Settings Configure Page` group
    - To access the **Groups** page to manage group membership, make sure you are in the `AS FS GM Manage Group Membership` group.
2. From the **Connected Servicing** site, select the navigation menu > **Connected FS Settings**.
3. From the **Welcome to Connected FS Settings** page, click a card to choose a settings page.



Setting Up Processes

Introduction

The **Process** section of the Connected FS Settings site allows business users to tailor tasks that need to occur for each service request. This page describes how to manage categories, tasks, and templates.



Business users can:

- Add, remove, and edit the categories that group tasks together.
- Add and edit the tasks that can be chosen for service request processes.
- Add and edit the service request templates that assign default tasks for a specific type of service request.

Managing categories

Categories group tasks together, usually by the function of the tasks or the group that performs the tasks. We have provided some categories out of the box that are completely configurable to meet the needs of your organization's service request process.

The out-of-the-box categories are:

- Compliance Preparation
- Document Review
- Enhanced Due Diligence

View categories

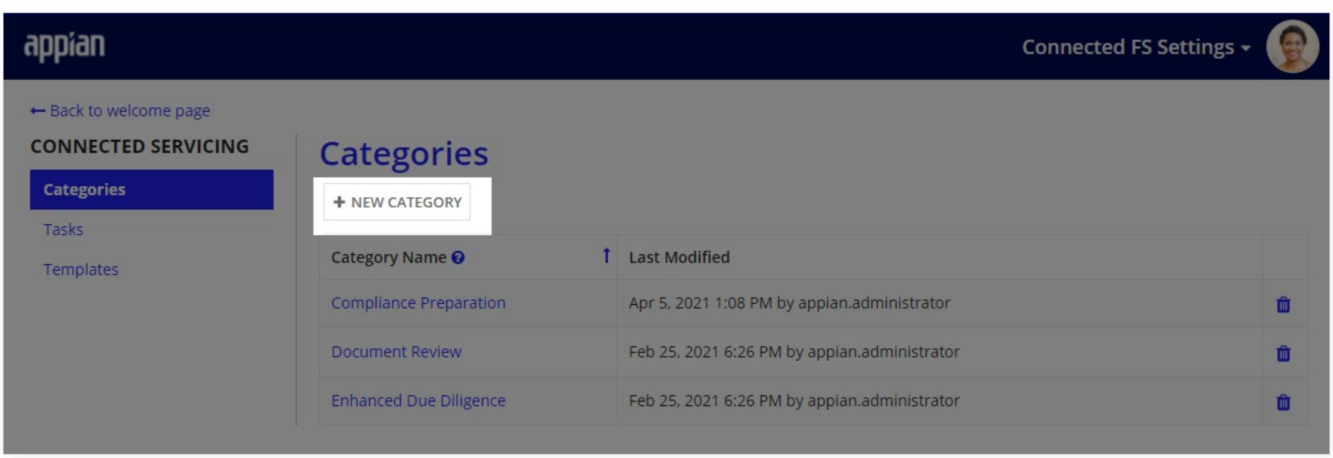
After you access the Connected FS Settings site, you can view the categories by clicking **PROCESS**. The **Categories** tab will display.

Add a category

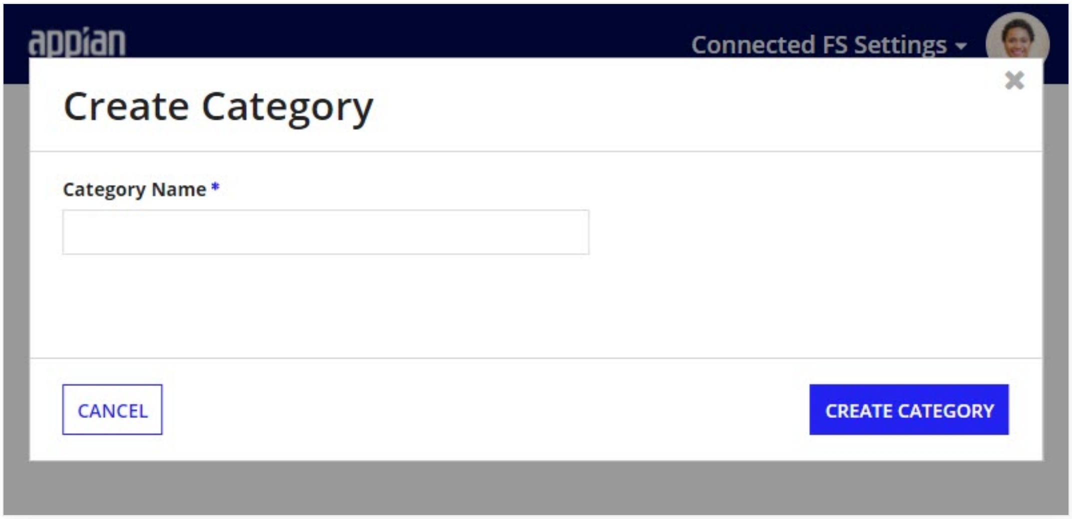
You can create a new category whenever you need a new way to group tasks, such as adding a process that requires related tasks to be completed. For example, if you want to create a new category for independent valuation tasks.

To add a category:

1. From the Categories page, click **NEW CATEGORY**.



2. Enter a **Category Name** and click **CREATE CATEGORY**.



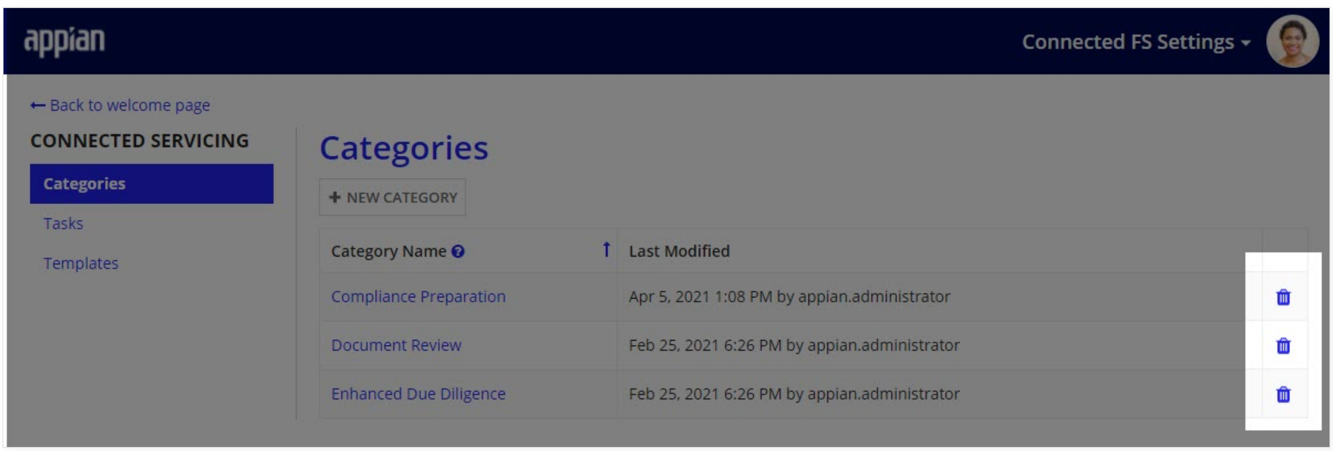
The new category will display for all new and existing service request templates.

Remove a category

If you ever need to remove a category, you can do it from the Connected FS Settings site.

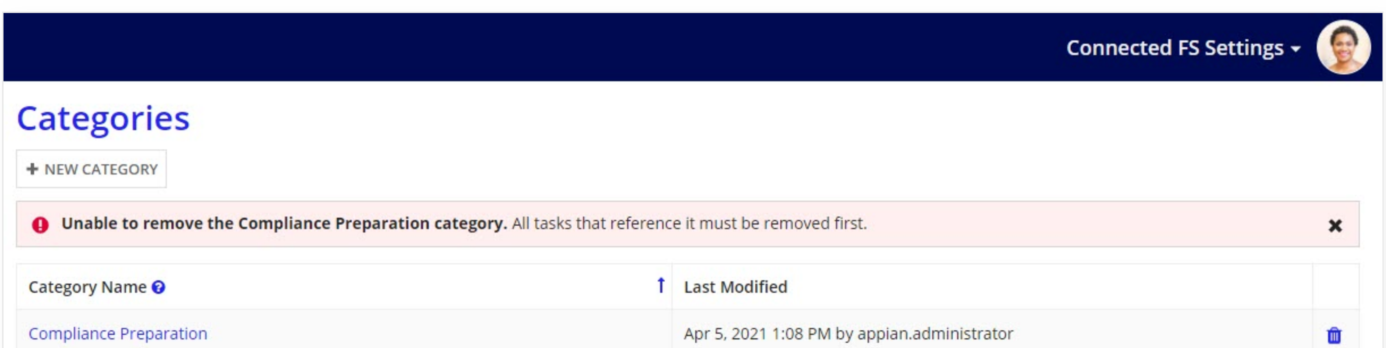
To remove a category:

- From the Categories page, next to the category you want to remove, click the delete icon.



The category will no longer display on service request templates.

Note: if there are any tasks on a template that reference the category, you will not be able to remove the category. A message will display to let you know that it cannot be removed. To remove the category, complete or cancel all tasks that reference the category.

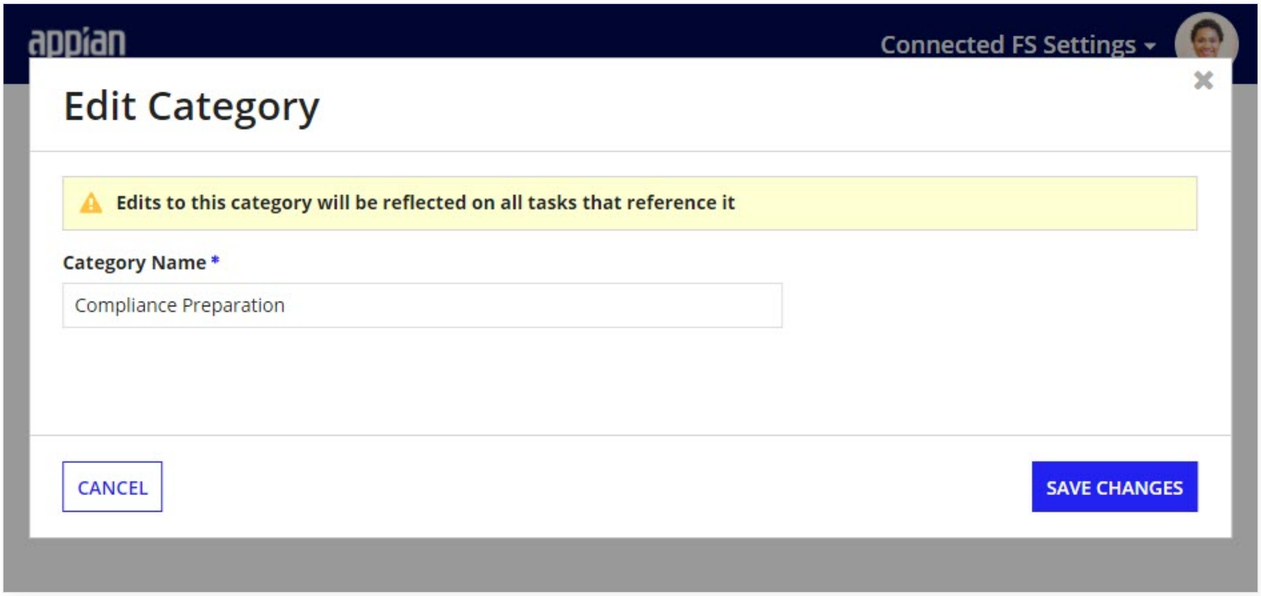


Edit a category name

If you ever need to update the name of a category, you can edit the name in the Connected FS Settings site.

To edit a category name:

1. From the Categories page, select the category you want to modify.
2. Enter a new **Category Name** and click **SAVE CHANGES**.



The new name will display in all new and existing tasks that reference it.

Managing tasks

In order to add tasks to service request templates, you will need to create a library of tasks to choose from.

Task types

Tasks can be one of six types:

- **Confirmation**: This type of task requires a user to select a checkbox that says the task has been completed.
- **Document Upload**: This type of task requires a user to upload a specific document.
- **Review**: This type of task requires a user to approve, reject, or make no decision on a task.
- **Enter New Customer Address**: This type of task requires a user to enter the benchmark details for a customer.

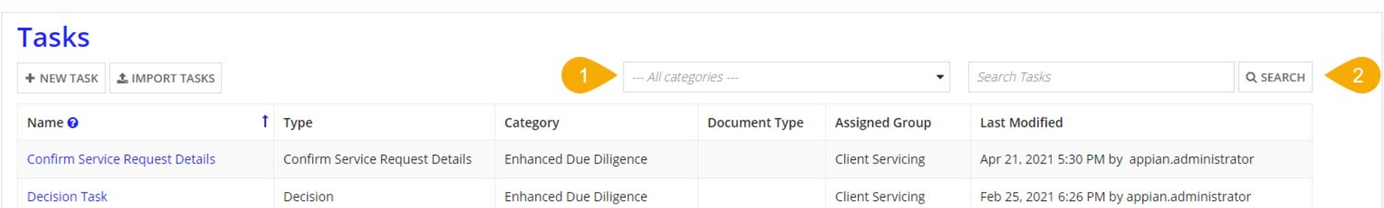
To learn how to complete each of these task types, see Managing Tasks. If you need to add a different task type, see Adding a New Task Type.

View tasks

To view the tasks, after you access the Connected FS Settings site click **PROCESS**. On the left, click **Tasks**. A list of existing tasks displays.

To filter the lists of tasks:

1. Select a category from the dropdown list, or
2. Enter a search term into the **Search Tasks** box.

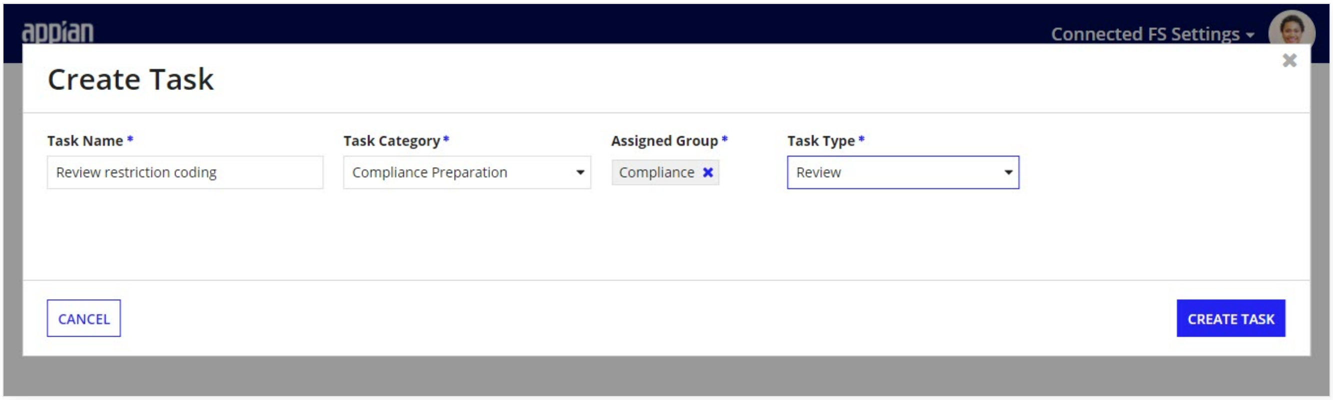


Add an individual task

If you only need to add a few tasks, you can add them one at a time.

To add an individual task:

1. From the Tasks page, click **NEW TASK**.
2. Enter a **Task Name**.
3. Select a **Task Category**.
4. Use the **Assigned Group** picker to select the group that should be responsible for the task.
5. Select the **Task Type** and click **CREATE TASK**.
6. If the **Task Type** is **Document Upload**, select a **Document Type**.



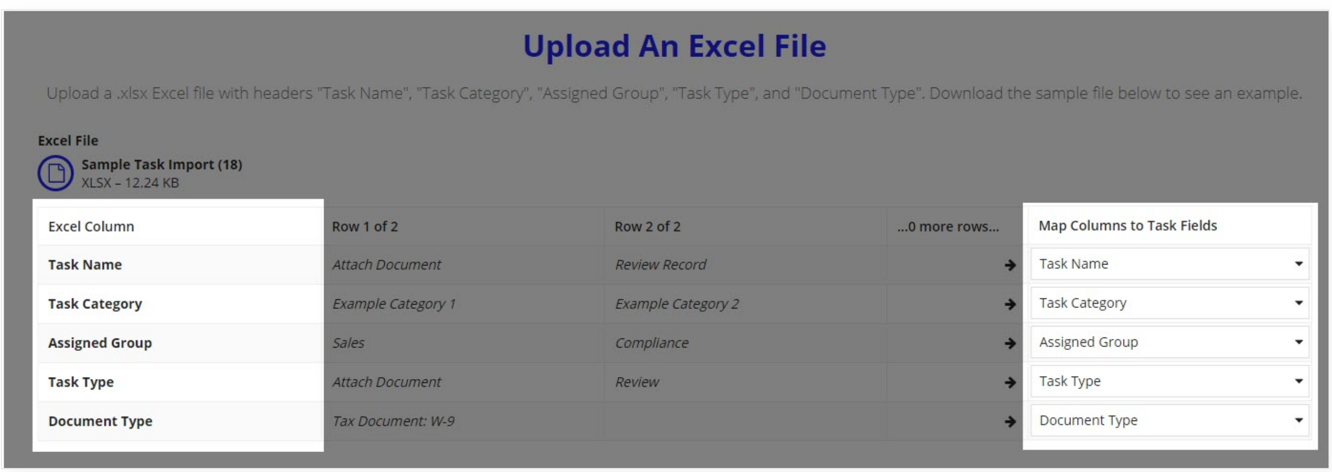
The new task will be available in all new and existing servicing requests templates.

Add multiple tasks by importing from Excel

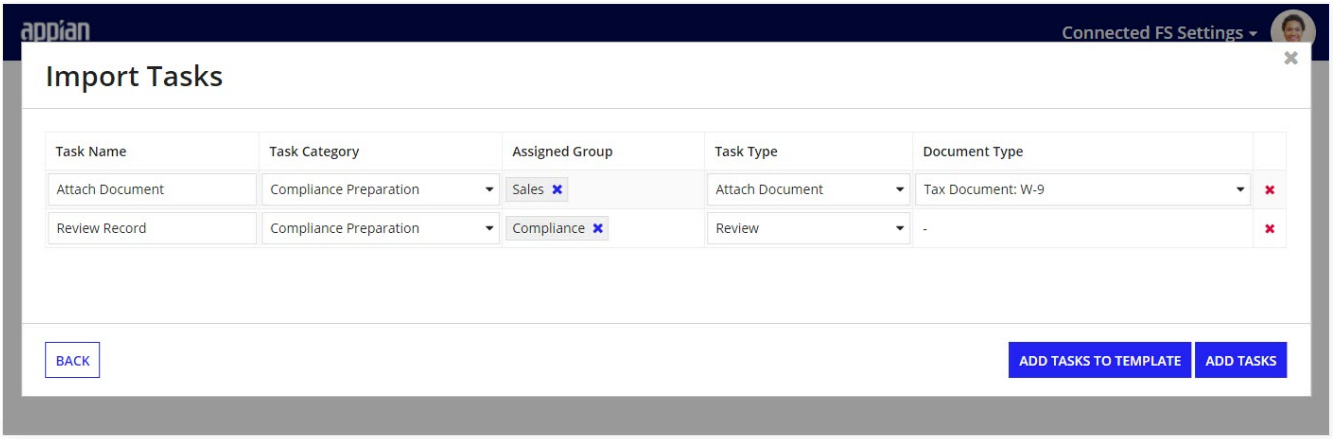
If you want to add many tasks at once, you can import tasks from an Excel spreadsheet.

To add multiple tasks:

1. From the Tasks page, click **IMPORT TASKS**.
2. Download the **Sample Import Excel File**.
3. Add multiple tasks to the spreadsheet, filling out the following fields:
   - **Task Name:** The display name for the task. There is a 50 character limit. Task names must be unique, or the task won't be imported.
   - **Task Category**: The category that the task should be grouped with. The valid values are any category listed on the Category page.
   - **Assigned Group**: The group that will automatically be assigned the task. The valid values are all business groups that are in the Connected Servicing application. See the Groups Reference Page for a list of the out-of-the-box business groups.
   - **Task Type**: The type of task. Out of the box, the valid values are: `Confirmation`, `Document Upload`, and `Review`.
   - **Document Type**: Only required if **Task Type** is **Document Upload**. If the **Task Type** is something else and a value is entered in this field, it will be ignored. Out of the box, the valid values are: `Agreement: Contract`, `Agreement: Custody`, `Agreement: Loan`, `Agreement: Payments`, `Agreement: Pricing`, `Agreement: Security`, `Counterparty Agreement`, `CSA Annexe`, `Foreign Supplier Details`, `Guidelines`, `IMA`, `Independent Validation`, `ISDA`, `Options Form`, `Other`, `Prime Brokerage`, `Proxy Form: Client`, `Proxy Form: Internal`, `Tax Document: W-8`, `Tax Document: W-9`, `User Permissions`.
4. Click **UPLOAD** and select the `Sample Task Import.xlxs` file that you just modified.
5. A list of the columns from the spreadsheet displays. Map the columns from the Excel sheet to the task fields. If you used the template without modifying the column headers, these should all match up automatically. Click **NEXT**.



6. The task fields that you entered display. Verify all of the fields are correct and there are no validation errors.
7. To create a new template with the tasks you just imported, click **ADD TASKS TO TEMPLATES**.
8. To add the tasks to the library of tasks, click **ADD TASKS**.

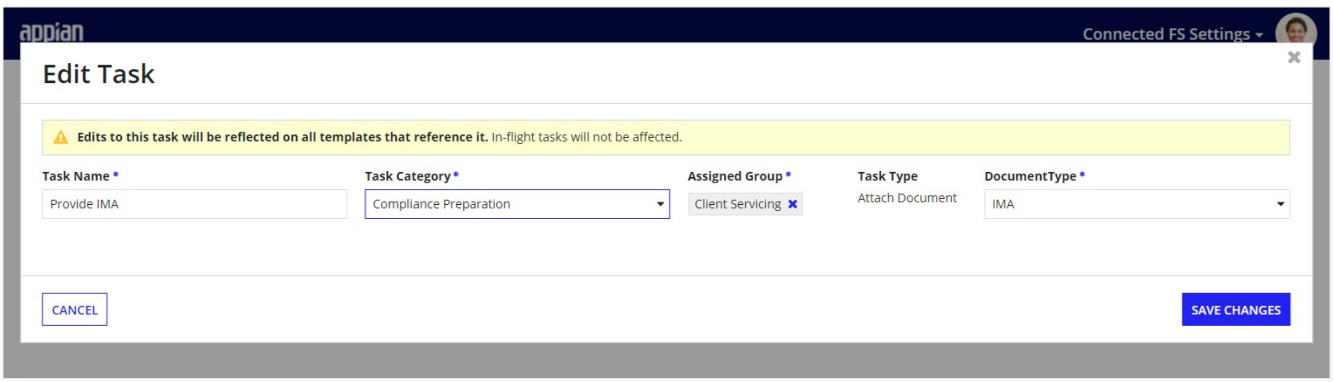


Edit tasks

If you ever need to update a task, you can edit it in the Connected FS Settings site.

To edit a task:

1. From the Tasks page, click the name of the task you want to modify.
2. Modify the **Task Name**, **Task Category**, **Assigned Group**, **Task Type**, and/or **Document Type** and click **SAVE CHANGES**.



All service request templates that reference the task will be updated. Service requests that are in progress will not be affected.

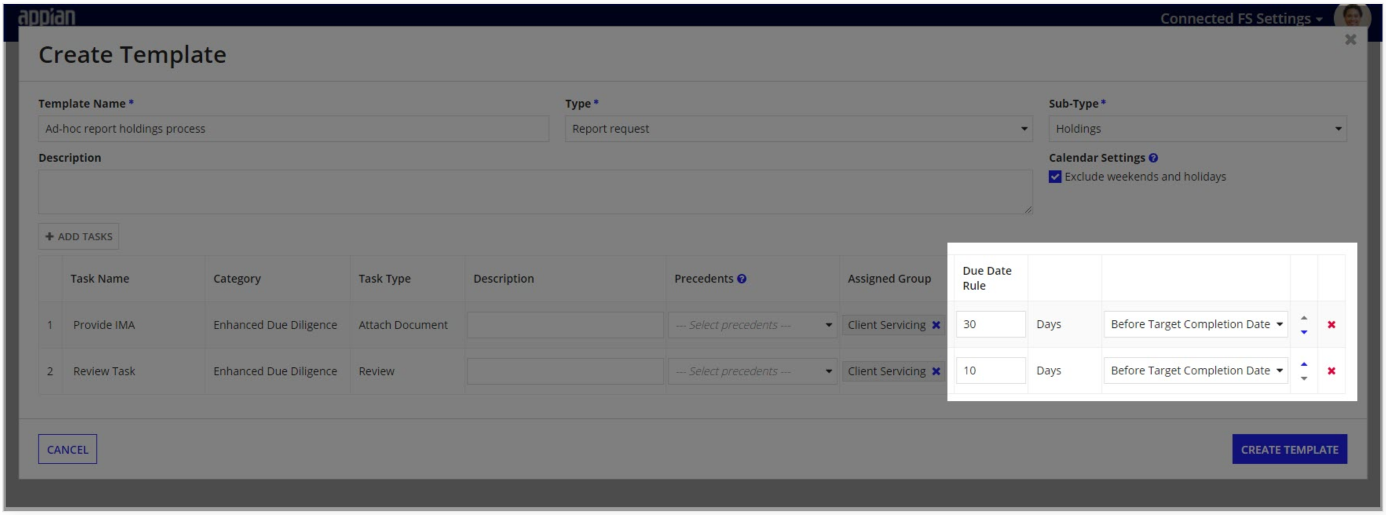
Edit task due dates

In a template, you can determine how an individual task's due date is calculated. By default, you can base the due dates off of a service request's target completion date.

If you want to change or add which dates you can select from, see how to modify key due dates. Once set, the due dates for the active tasks will change accordingly.

To edit a due date on the Connected FS Settings Site:

1. Navigate to the **Templates** section of the site.
2. Select the template you want to edit.
3. Adjust the **Task Due Date** days for the task you want to change.
    - You can change the due date to be before the selected target completion date, depending on the nature of the task.



You may have a task whose due date comes before its precedent task. You may need to adjust that task's due date to prevent the service request from being at risk of missing its completion date.

Managing templates

A service request for an ad-hoc report required different tasks than updating a customer's domicile. This is where service request templates come into play. A service request process is all of the tasks that will be used to complete the request for a customer. The type and sub-type that is input when the service request is being created will determine which process template will be selected.

View templates

On the Connected FS Settings site, a grid lists all of the information that is pertinent to service request templates. Users can use this information to determine which templates already exist and when they were last updated.

To view the templates, after you access the Connected FS Settings site click **PROCESS**. On the left, click **Templates**. A list of the existing templates displays.

You can search this list for a particular template. Clicking the history icon ↺ will take you to the Template History for that template with a list of all the changes that have been made to it.

Clicking a template name displays the tasks for that template and allows you to edit them.

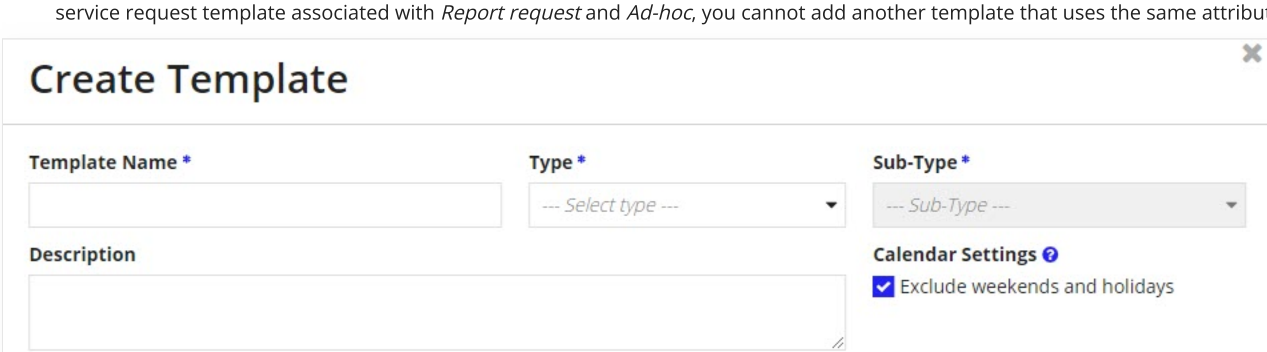
Create a new template

After installing the Connected Servicing application, new service request templates that fit your organization's processes will need to be added. Also, changes in the organization, such as adding new service request types, may require creating new templates.

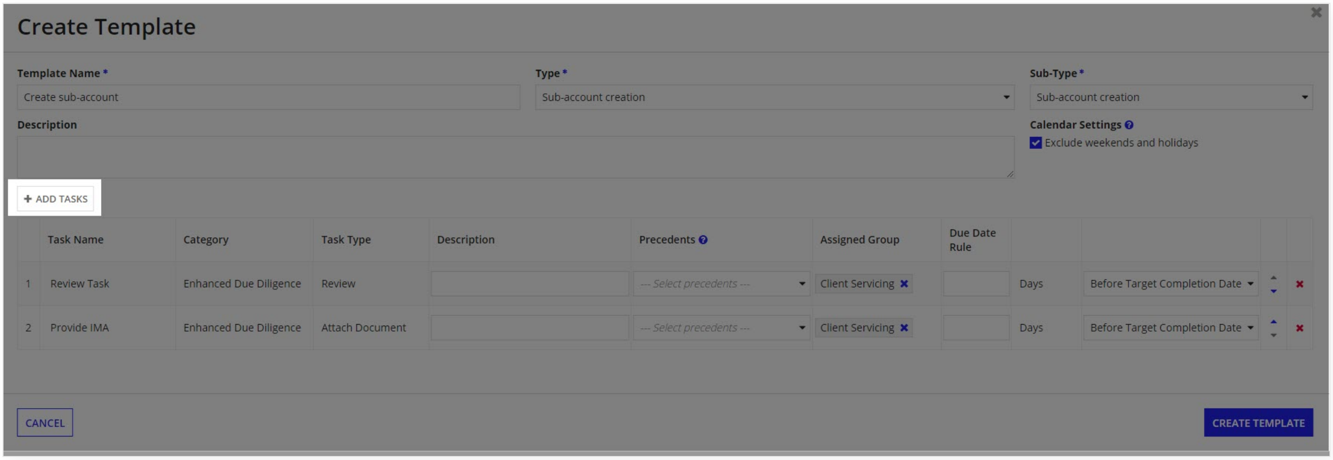
You can create a new template from the Templates page or an Excel document. See Add multiple tasks by importing from Excel for instructions on creating a template by adding tasks using Excel.

To create a new service request template:

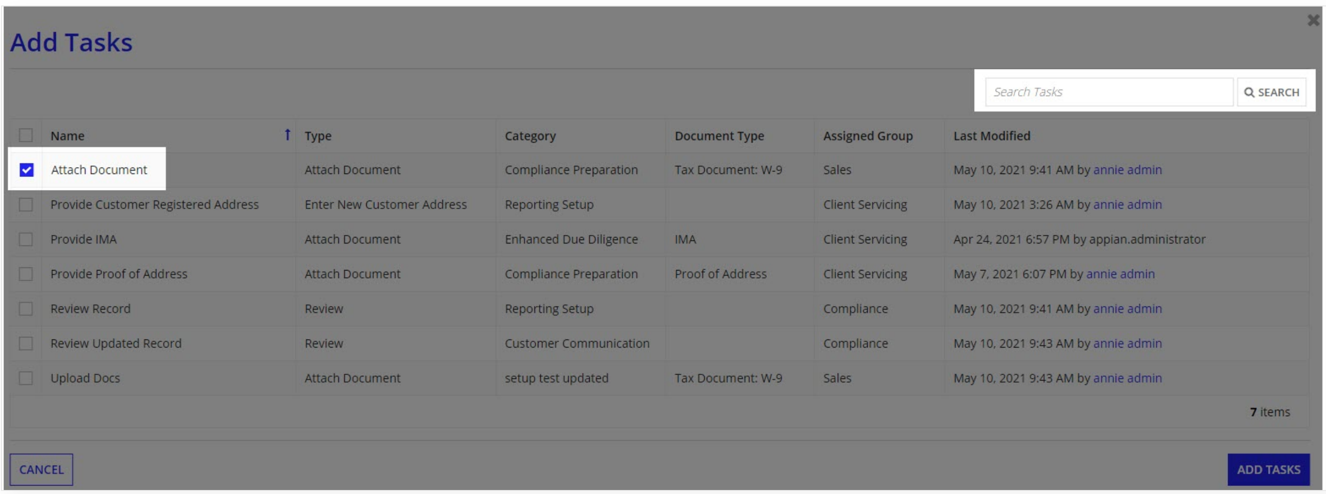
1. From the Templates page, click **NEW TEMPLATE**.
2. Enter a **Template Name**.
3. Select the attributes that will be used to select the new template when a new service request is being created. Out of the box, these attributes are **Type** and **Sub-type**. See Modifying Service Request Process Selection Attributes for instructions on how to modify these attributes.
   - **Note:** There cannot be more than one template that uses the same combination of type and sub-type. For example, if there is already a service request template associated with *Report request* and *Ad-hoc*, you cannot add another template that uses the same attributes.



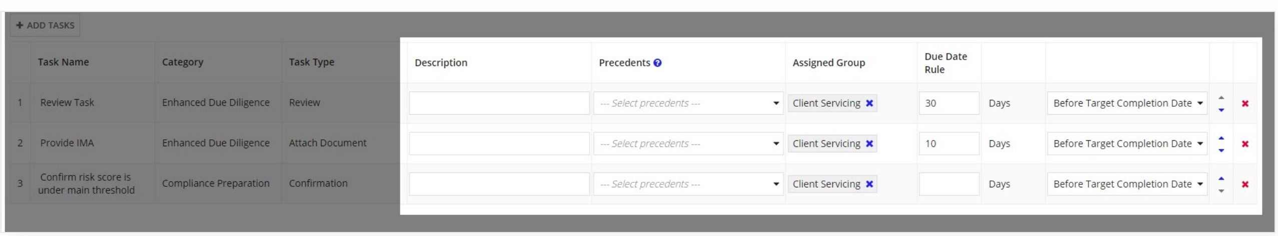
4. Click **ADD TASKS** to add the tasks that will be the default tasks for that service request type.



5. Select the task or tasks that you want to add to the template. You can use the **Search Tasks** box to find tasks.



6. Click **ADD TASKS**.
7. Modify the tasks. You can do this in the following ways:
    - Add a default **Description** to any task.
    - Modify the default **Precedents**.
        - **Note:** A precedent is a task that must be completed before another task can be assigned.
    - Modify the default **Assigned Group** for the task.
    - For **Task Due Date**, enter the number of days that the task will be due before or after the target completion date.
    - Remove tasks by clicking the red **X**.



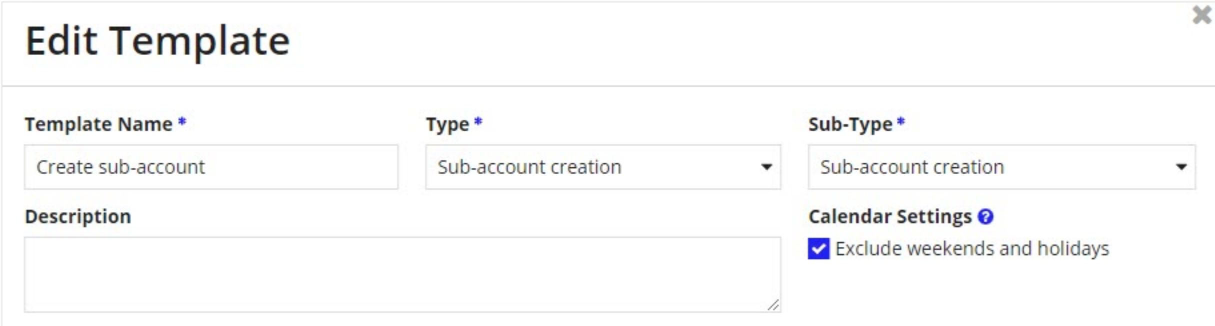
8. Click **CREATE TEMPLATE**.

Update an existing template

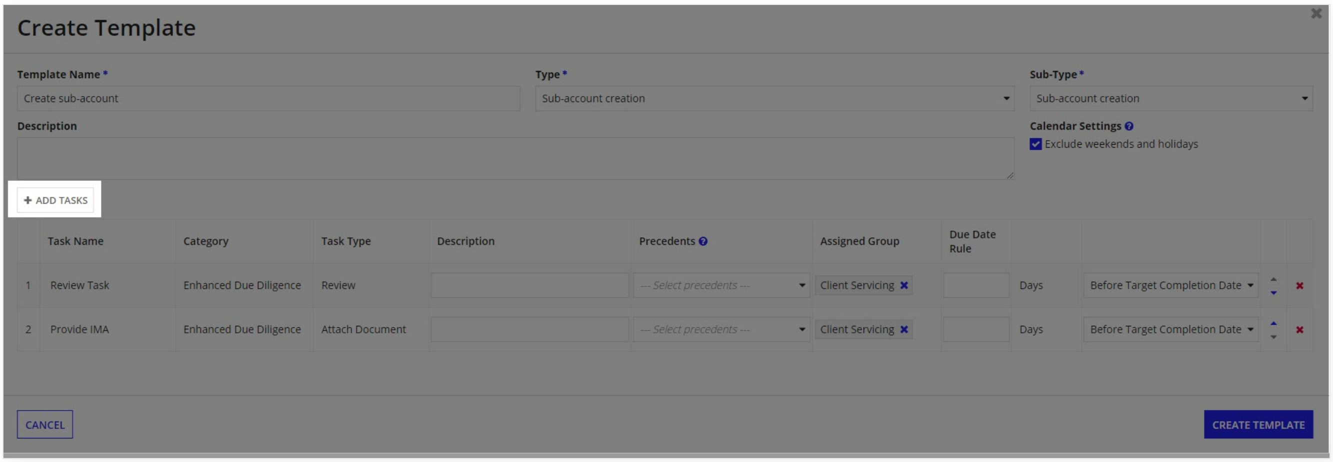
With the Connected FS Settings site, users can easily update the service request templates with their changes.

To update a service request template:

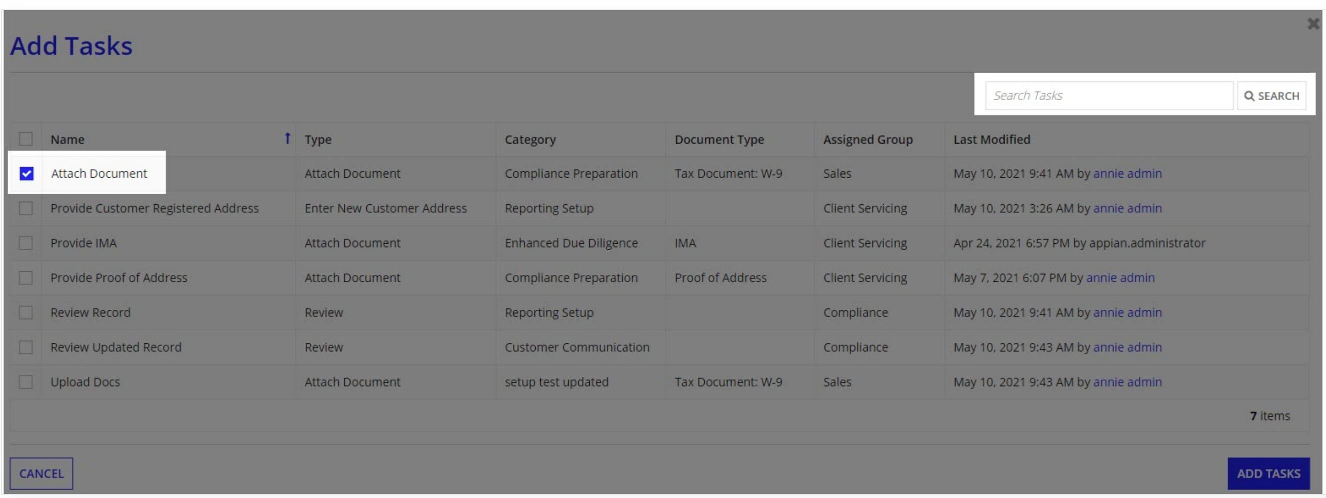
1. Make sure any tasks you want to add is on the Tasks page.
2. From the Templates page, click the template name that you want to update.
3. If desired, update the **Template Name**, **Type**, **Sub-type**, and/or **Description**.
    - **Note: Type Type** and **Sub-type** are the attributes that determine which template will be used after a user creates a service request. If you need to change the attributes used to select the template, see Modifying Service Request Template Selection Attributes.



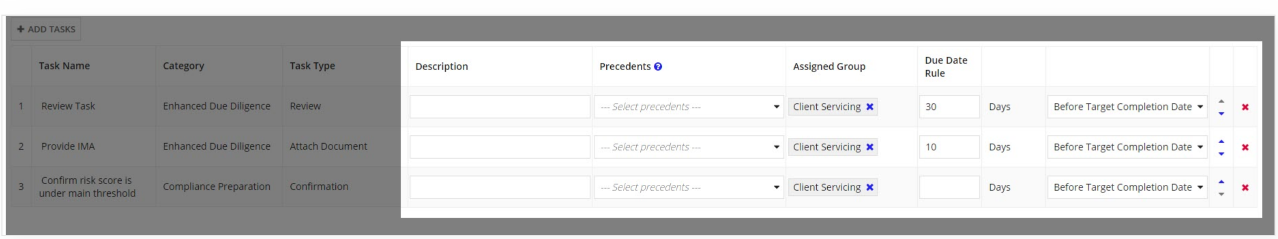
4. Click **ADD TASKS**



5. Select the task or tasks that you want to add to the template. You can use the **Search Tasks** box to find tasks.



6. Click **ADD TASKS**.
7. Modify the tasks. You can do this in the following ways:
   - Add a default **Description** to any task.
   - Modify the default **Precedents**.
     - **Note:** A precedent is a task that must be completed before another task can be assigned.
   - Modify the default **Assigned Group** for the task.
   - For Task Due Date, enter the number of days that the task will be due before or after the target completion date.
   - Remove tasks by clicking the red **X**



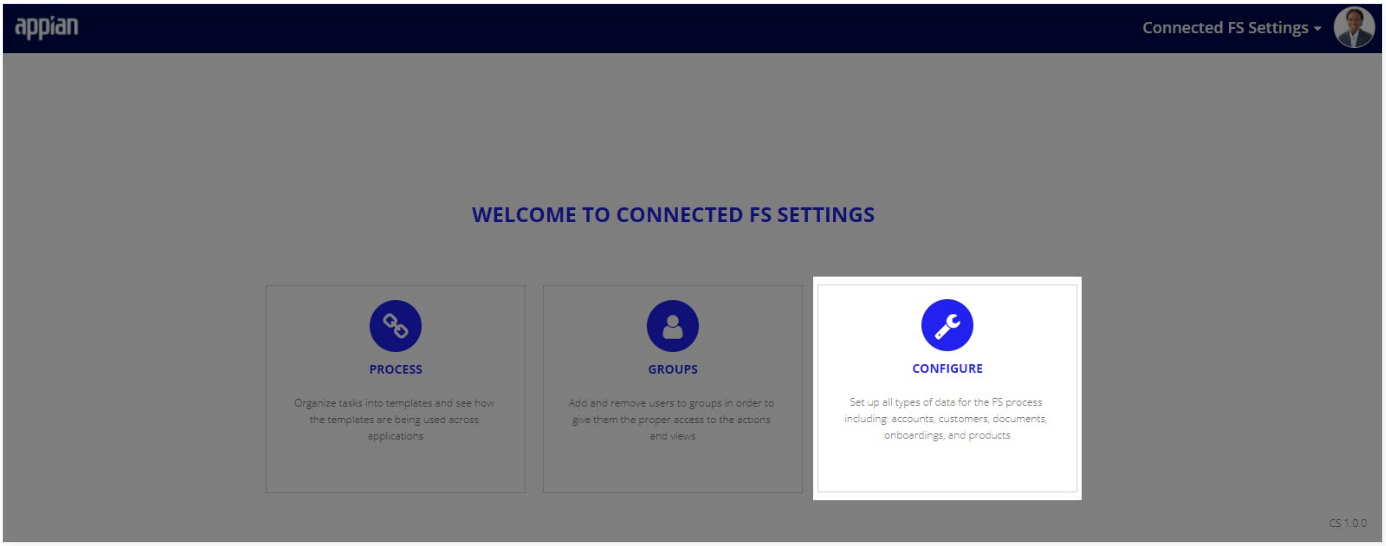
8. Click **SAVE CHANGES**.

All future service requests will use the modified template. Service requests that are already in process or completed will not be affected.

Configure Service Requests

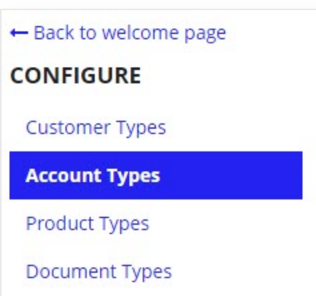
Introduction

The **Configure** section of the Connected FS Settings site allows business users to manage dropdown values for their service request data.



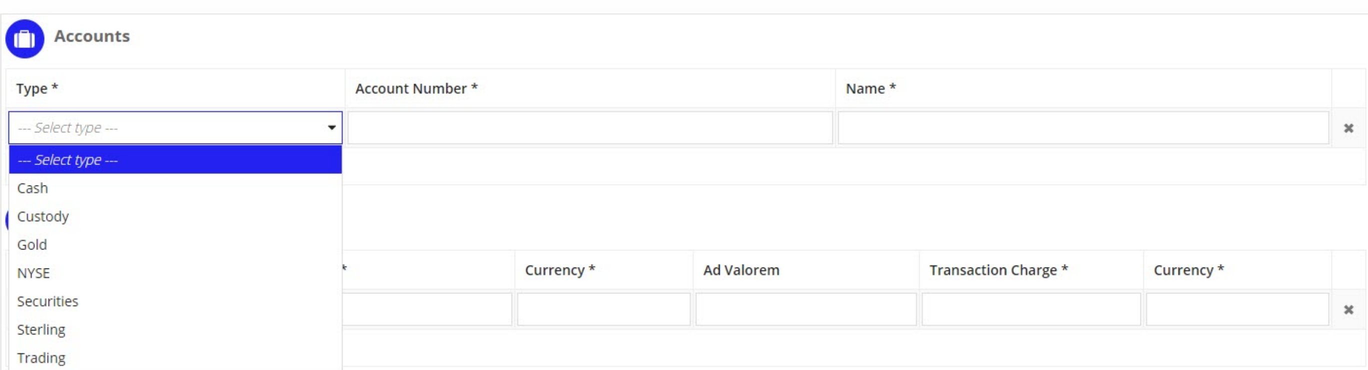
This page describes how to manage:

- Account types
- Customer types
- Document types
- Product types



Configure Account Types

The account type dropdown is accessed when a product is added

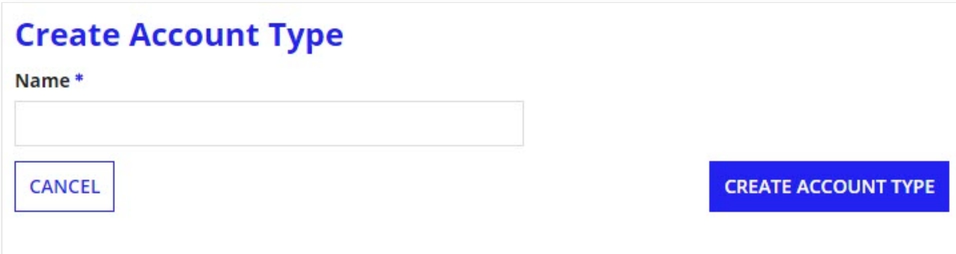


The default values are: cash, custody, gold, NYSE, securities, sterling, and trading. If you need to change this dropdown you are able to add, remove, and update these values.

Add an account type

To add a new account type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **ACCOUNT TYPES**, then click **NEW ACCOUNT TYPE**.
3. Enter the account type **Name**. This has a 100 character limit and must be unique.
4. Click **CREATE ACCOUNT TYPE**.



Remove an account type

To remove an account type:

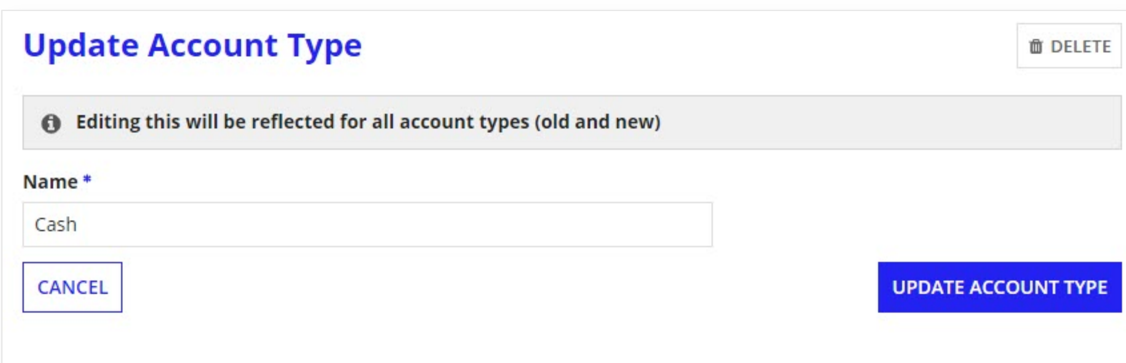
1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **ACCOUNT TYPES**, then click the account type that you would like to remove.
3. Click **DELETE**.
4. In the confirmation message, click **DELETE** again.

If this account type is set up to be a default account type for certain products, it will no longer be associated to those products. Additionally, if an account type is removed, anywhere it is already referenced will now show that it is inactive.

Update an account type

To update an account type:

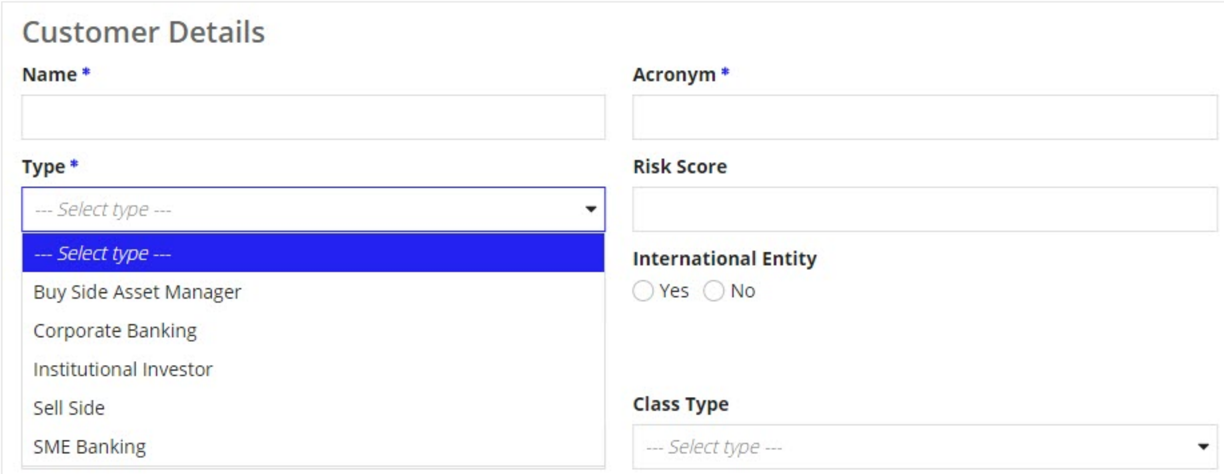
1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **ACCOUNT TYPES**, then click the account type that you would like to update.
3. Update the the account type **Name**. This has a 100 character limit and must be unique.
4. Click **UPDATE ACCOUNT TYPE**.



Updating the account type will be reflected for anywhere this account type is used on both previous and new customers.

Configure customer types

The customer type dropdown is accessed when a new customer is created.

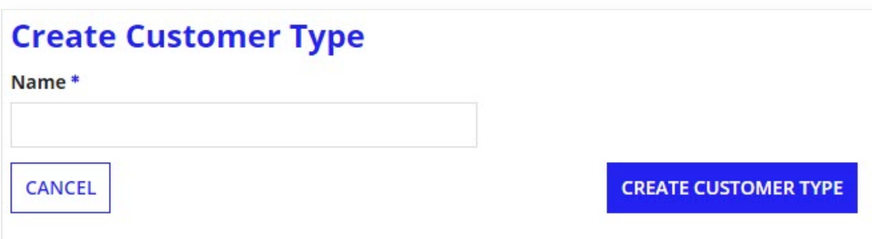


The default values are: buy side asset manager, corporate banking, institutional investor, sell side, and SME banking. If you need to change this dropdown you are able to add, remove, and update these values.

Add a customer type

To add a new customer type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **CUSTOMER TYPES**, then click **NEW CUSTOMER TYPE**.
3. Enter the customer type **Name**. This has a 100 character limit and must be unique.
4. Click **CREATE CUSTOMER TYPE**.



Remove a customer type

To remove a customer type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **CUSTOMER TYPES**, then click the customer type that you would like to remove.
3. Click **DELETE**.
4. In the confirmation message, click **DELETE** again.

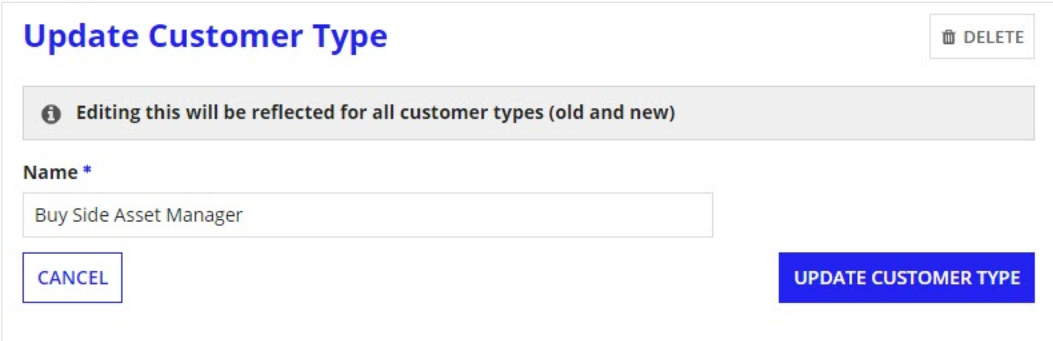
If a customer type is removed, anywhere it is already referenced will now show that it is inactive.

Update a customer type

To update a customer type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **CUSTOMER TYPES**, then click the customer type that you would like to update.
3. Update the customer type **Name**. This has a 100 character limit and must be unique.
4. Click **UPDATE CUSTOMER TYPE**.

Updating the customer type will be reflected for anywhere this type is used on both previous and new customers.



Configure document types

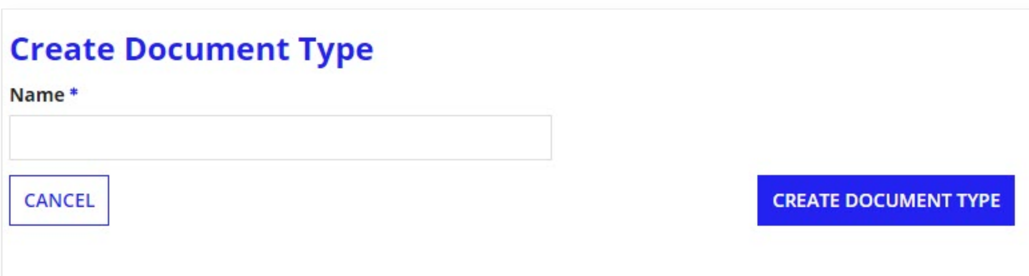
The document type dropdown is accessed when a document is uploaded to a service request or customer.

There are several default values including: articles of incorporation, credit report, IMA, and CSA annex. If you need to change this dropdown you are able to add, remove, and update these values.

Add a document type

To add a new document type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **DOCUMENT TYPES**, then click **NEW DOCUMENT TYPE**.
3. Enter the document type **Name**. This has a 100 character limit and must be unique.
4. Click **CREATE DOCUMENT TYPE**.

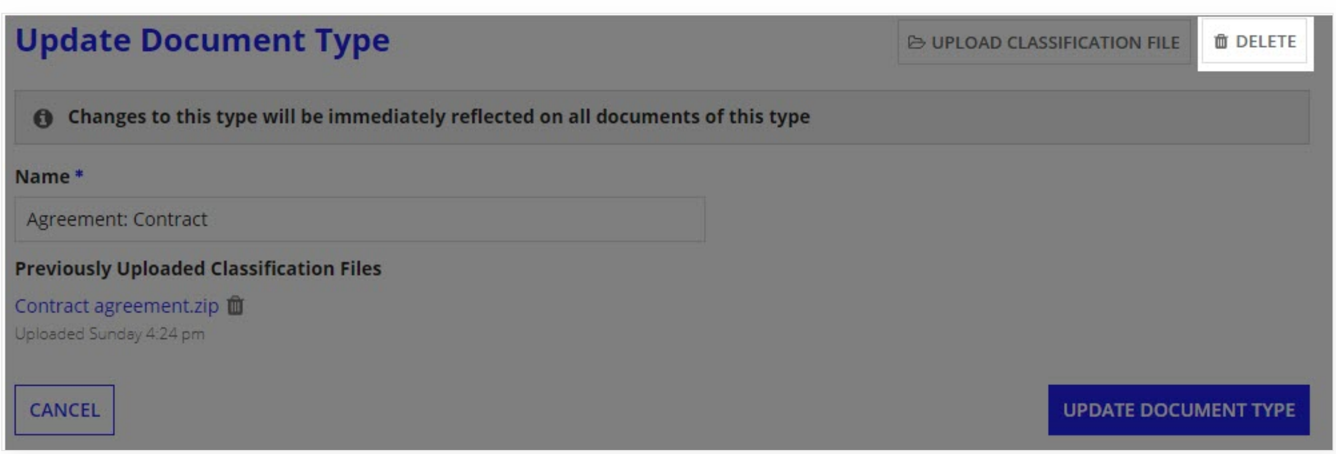


Remove a document type

To remove a document type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **DOCUMENT TYPES**, then click on the document type that you would like to remove.
3. Click **DELETE**.
4. In the confirmation message, click **DELETE** again.

If a document type is removed, anywhere it is already referenced will now show that it is inactive.

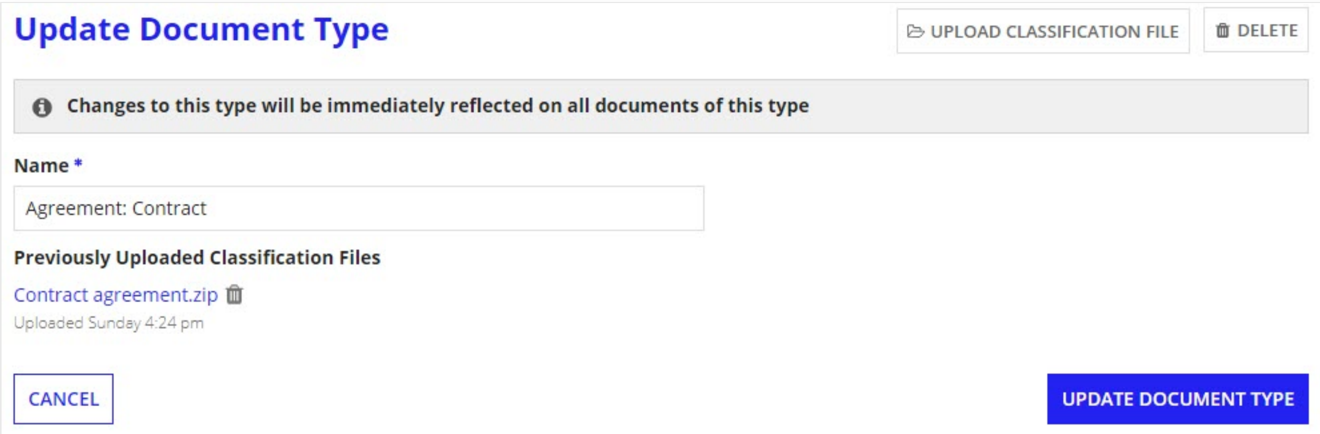


Update a document type

To update a document type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **DOCUMENT TYPES**, then click the document type that you would like to update.
3. Update the document type **Name**. This has a 100 character limit and must be unique.
4. Click **UPDATE DOCUMENT TYPE**.

Updating the document type will be reflected for anywhere this type is used on both previous and new documents.



Set up document classification files

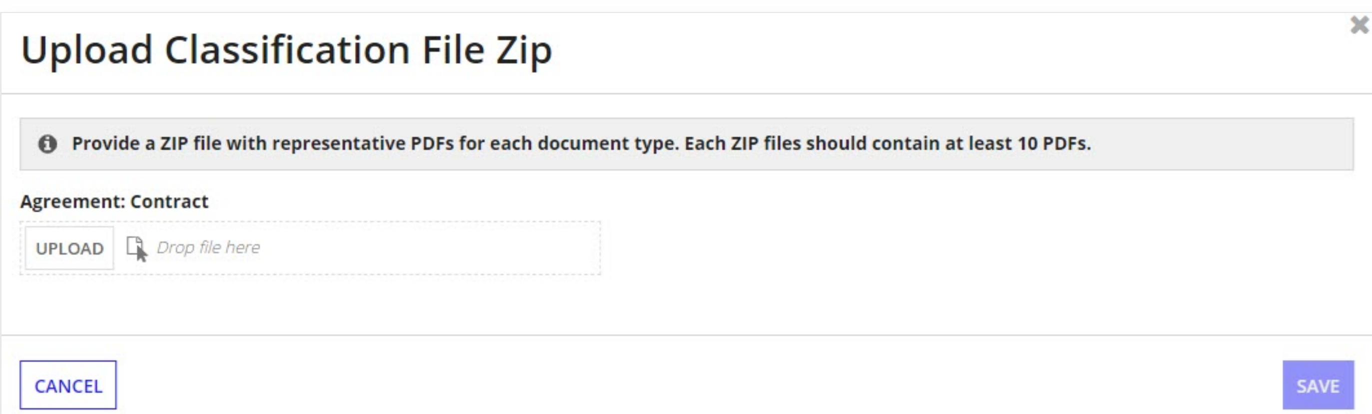
If Intelligent Document Processing (IDP) is being used in your environment, a business user has the ability to train Connected Servicing to recognize different document types. If trained, when a user uploads a document to the system, the system can automatically determine what type of document has been uploaded. This will save users time and ensure accuracy when attaching documents to service requests.

Classification files are groups of 10 example documents of the same document that will be used to train the system to recognize that format as a certain document type.

Add document classification files to a single document type

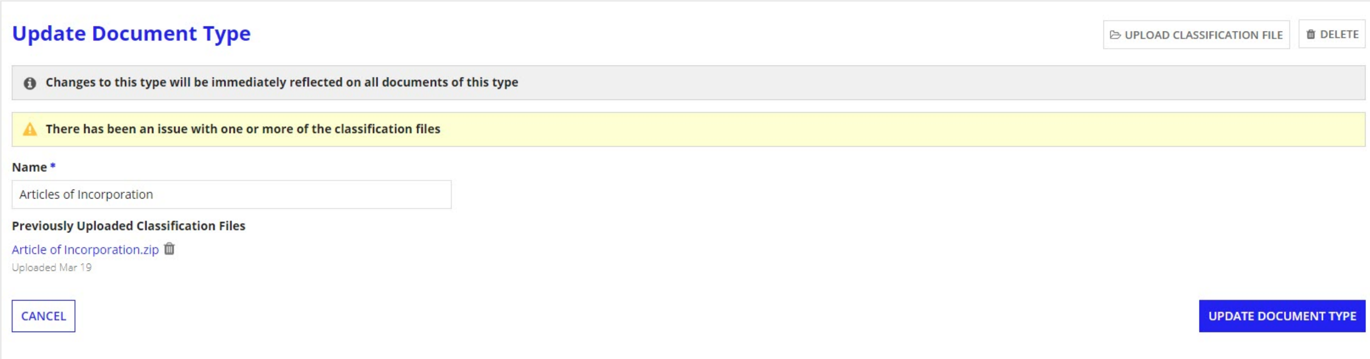
To add a document classification file:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **DOCUMENT TYPES**, then click on the document type that you would like to add files to.
3. Click **UPLOAD CLASSIFICATION FILE**.
   - **Note:** If IDP is not enabled in the environment, the **UPLOAD CLASSIFICATION FILE** button will not be available.
4. Attach a ZIP file with representative PDFs for the document type. Each ZIP file should contain at least 10 PDFs.
   - **Note:** If the training model is processing, you must wait until it is done before submitting a new classification file. Training the model can take several hours.
5. Click **SAVE**.



If there are any issues with the classification files and the system could not process them there will be an indicator next to the name of each document type with an issue.

When you click on a document type with an issue you will also see a message on the **UPDATE DOCUMENT TYPE** page.



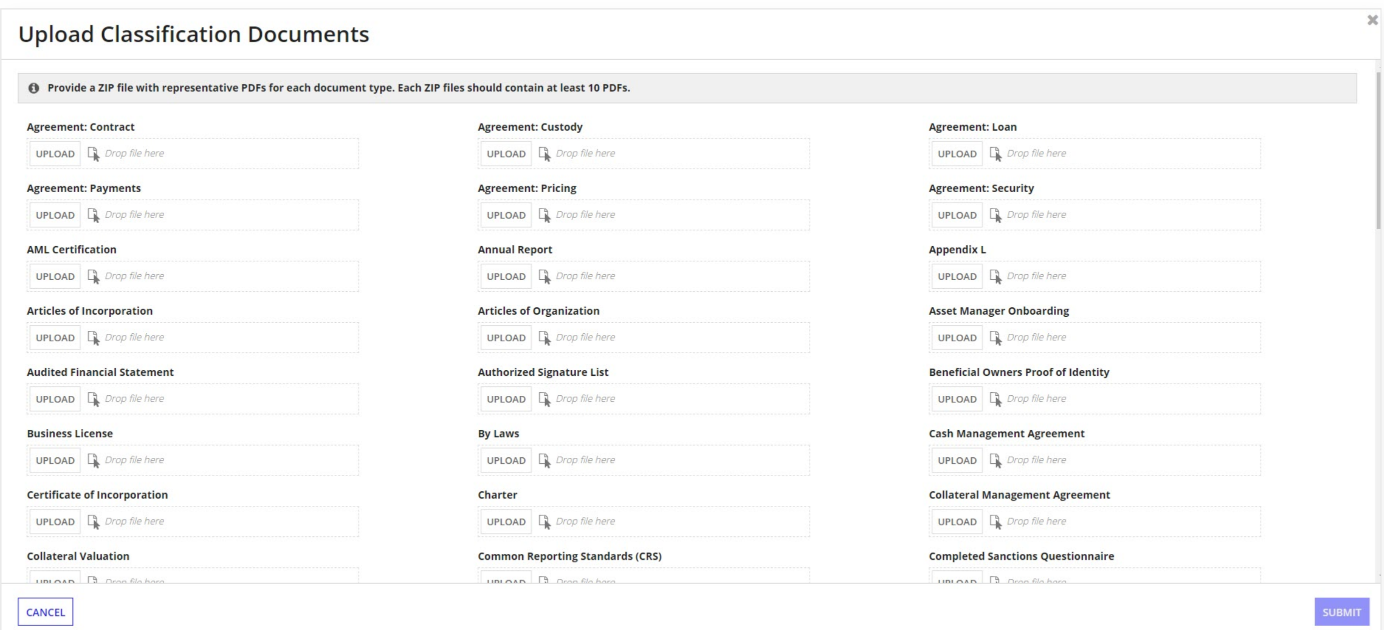
You will need to remove and re-upload the files to fix any issues.

Bulk add document classification files

It is possible to add multiple files in order to train the system on many document types at once.

To bulk add document classification files:

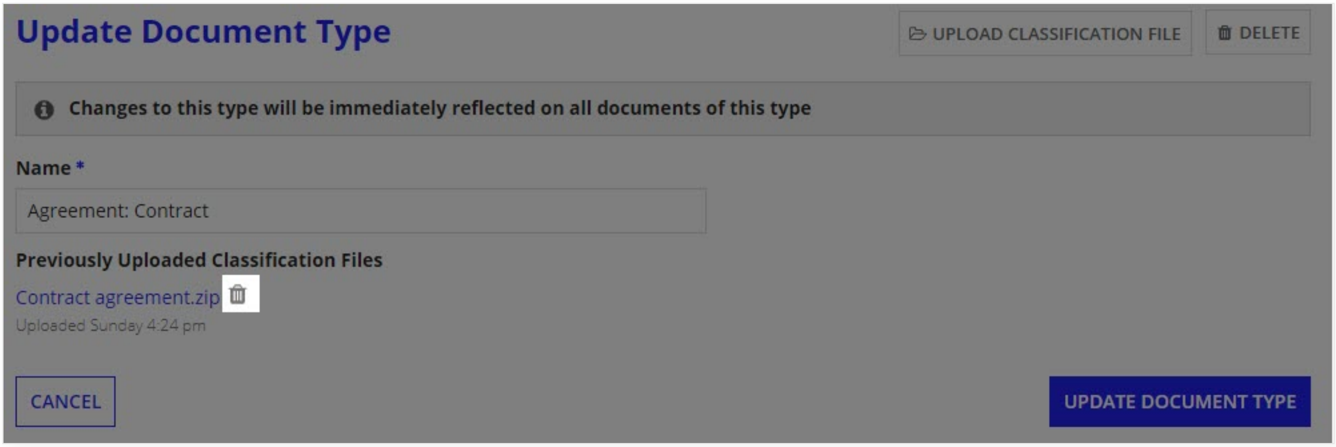
1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **DOCUMENT TYPES**.
3. Click **ADD CLASSIFICATION FILES**.
    - **Note:** If IDP is not enabled in the environment, the **ADD CLASSIFICATION FILES** button will not be available.
4. Attach a ZIP file with representative PDFs for each document type that you want to add classification files for. Each ZIP file should contain at least 10 PDFs.
    - **Note:** If the training model is processing, you must wait until it is done before submitting a new classification file. Training the model can take several hours.
5. Click **SUBMIT**.



Remove document classification files

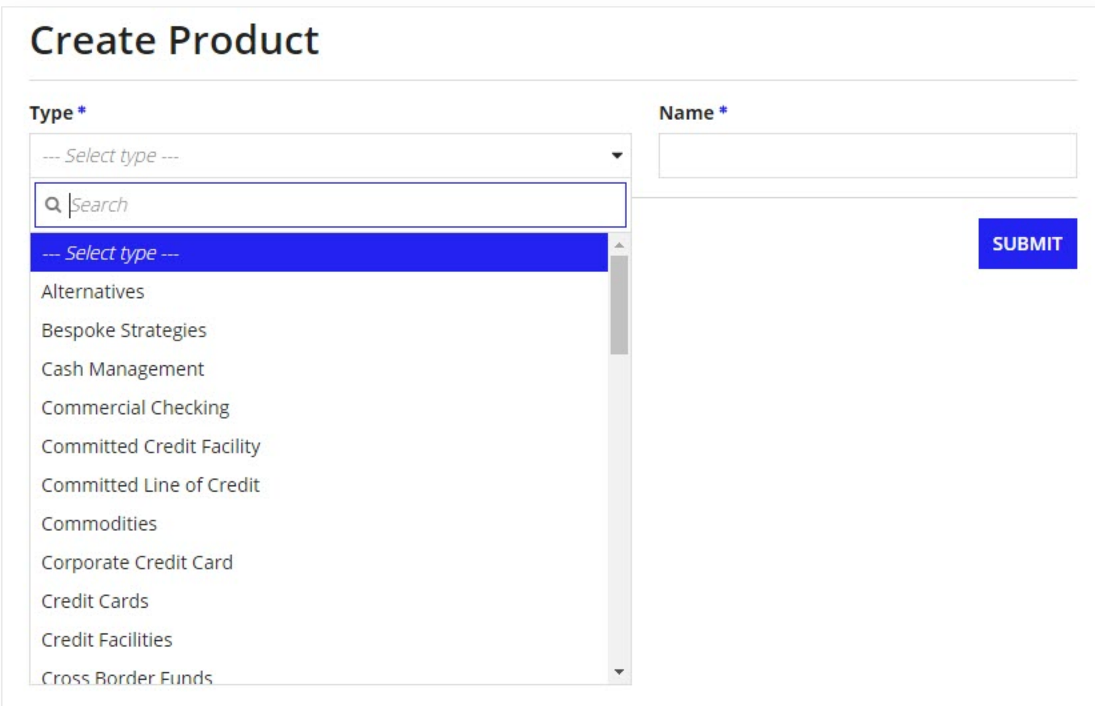
To remove a document classification file:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **DOCUMENT TYPES**, then click on the document type that you would like to remove the file from.
3. Next to the file you would like to remove, click 🗑.
    - **Note:** If the training model is processing, you must wait until it is done before removing a classification file. Training the model can take several hours.
4. Click **UPDATE DOCUMENT TYPE**.



Configure product types

The product type dropdown is accessed while adding a product to a customer record.

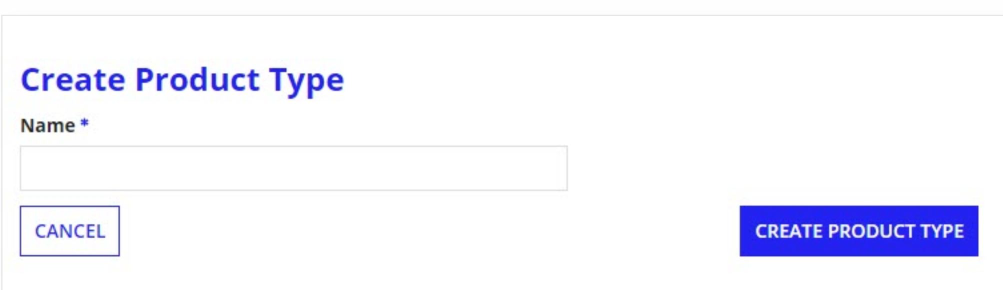


If you need to change the default dropdown list you are able to add, remove, and update these values.

Add a product type

To add a new product type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **PRODUCT TYPES**, then click **NEW PRODUCT TYPE**.
3. Enter the product type **Name**. This has a 100 character limit and must be unique.
4. Click **CREATE PRODUCT TYPE**.

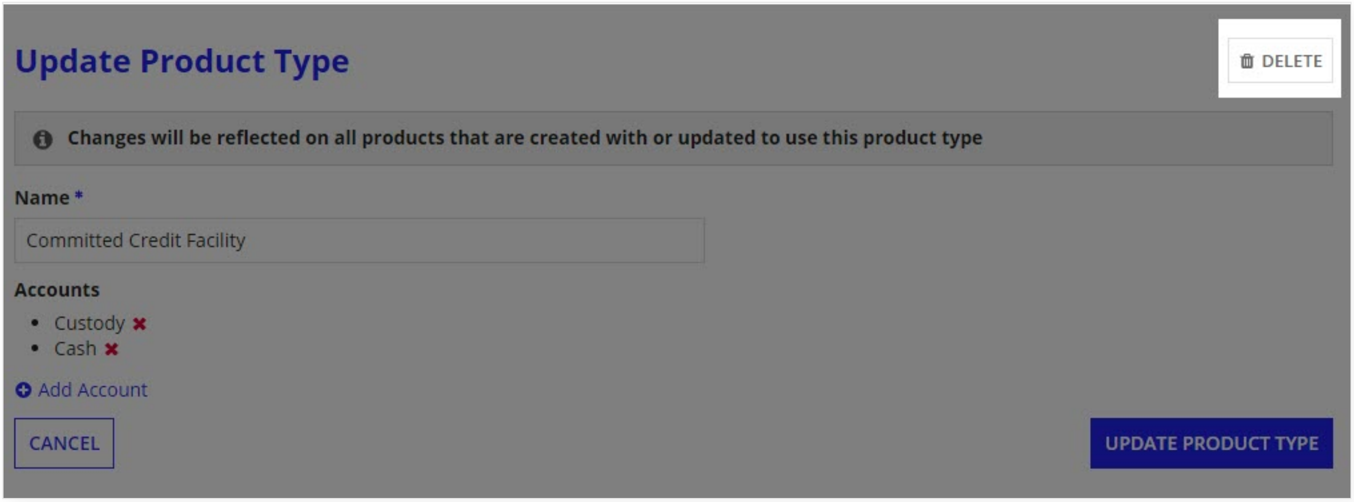


Remove a product type

To remove a product type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **PRODUCT TYPES**, then click on the product type that you would like to remove.
3. Click **DELETE**.
4. In the confirmation message, click **DELETE** again.

If a product type is removed, anywhere it is already referenced will now show that it is inactive.

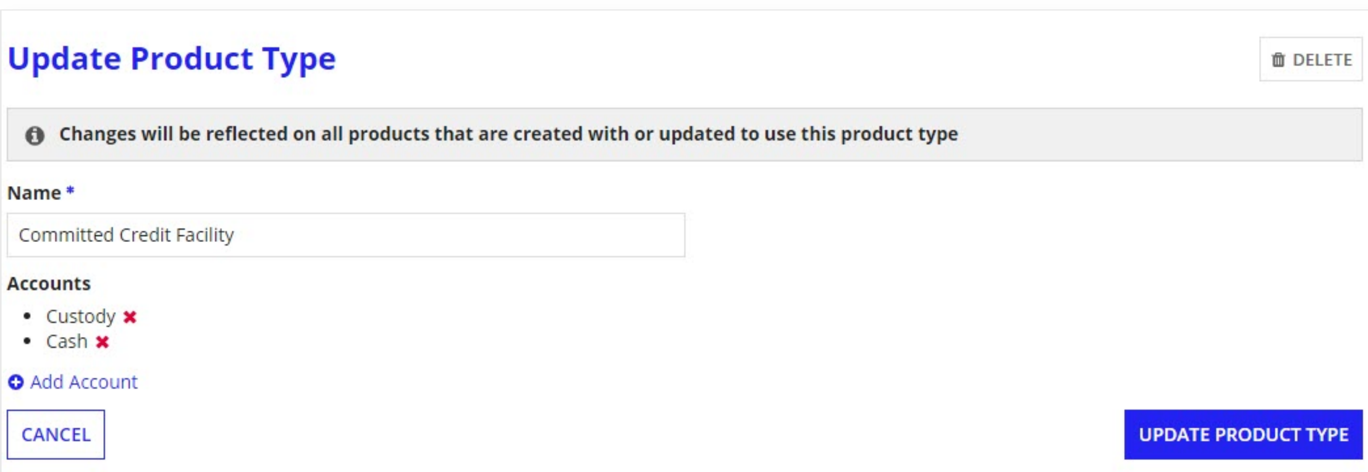


Update a product type

To update a product type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **PRODUCT TYPES**, then click on the product type that you would like to update.
3. Update the product type **Name**. This has a 100 character limit and must be unique.
4. Click **UPDATE PRODUCT TYPE**.

Updating the product type will be reflected anywhere this type is used on both previous and new products.



Manage default account types for products

When a product is added to a customer, if there are account types associated with the product type they will automatically be added to the account grid.

Business users can set up which accounts will be automatically added for each product type by setting the default accounts for the product type while updating the product type in the Connected FS settings site.

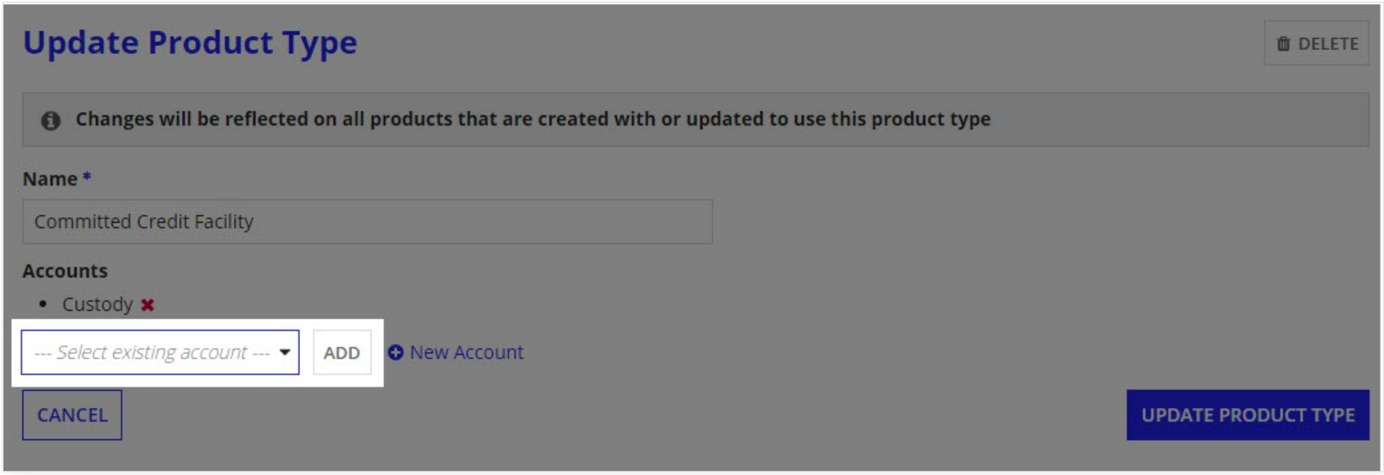
Add an account to a product type

To add an account to a product type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **PRODUCT TYPES**, then click on the product type that you would like to update.
3. Click **ADD ACCOUNT**.

4. Choose which existing account type to add.
    - **Note:** If the account you are trying to add does not exist, click the add account link to add the new account type to the dropdown list.
5. Click **ADD**.

Going forward, products added to customers will reflect the changes made to the default accounts. Existing customer products will not be affected.



Remove an account from a product type

To remove an account from a product type:

1. From the Connected FS Settings site, click **CONFIGURE**.
2. On the left click **PRODUCT TYPES**, then click the product type that you would like to update.
3. Click the red ✖ icon next to the account type you would like to remove.

Only new products added to customers will reflect the changes made to the default accounts.

Accessing System Administration Center

Introduction

The **System Administration Center** is a separate site in the Connected Servicing application. It allows administrators:

- Turn on/off connected integrations.
- View and update properties for connected integrations.
- Test integration connections.

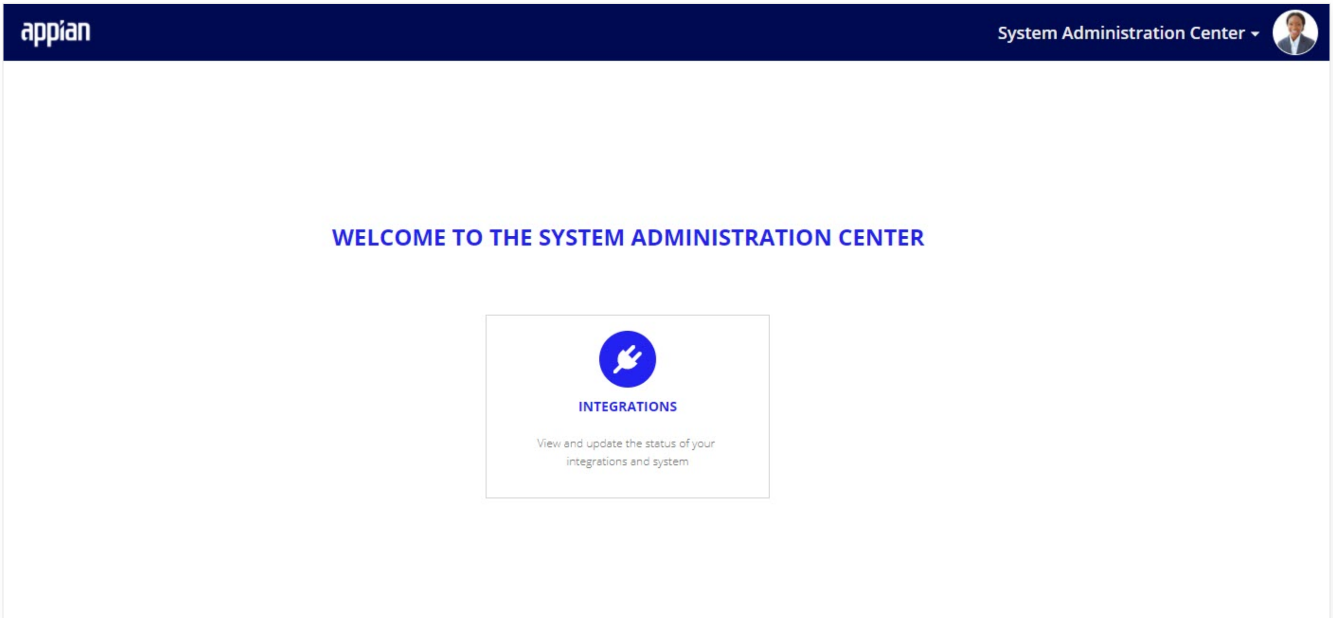
Only administrators with the appropriate group membership are able to access this site. This ensures that only a select few have access to sensitive processes and information.

This page provides instructions and prerequisites for accessing the **System Administration Center**.

Accessing the System Administration Center

To access the **System Administration Center**:

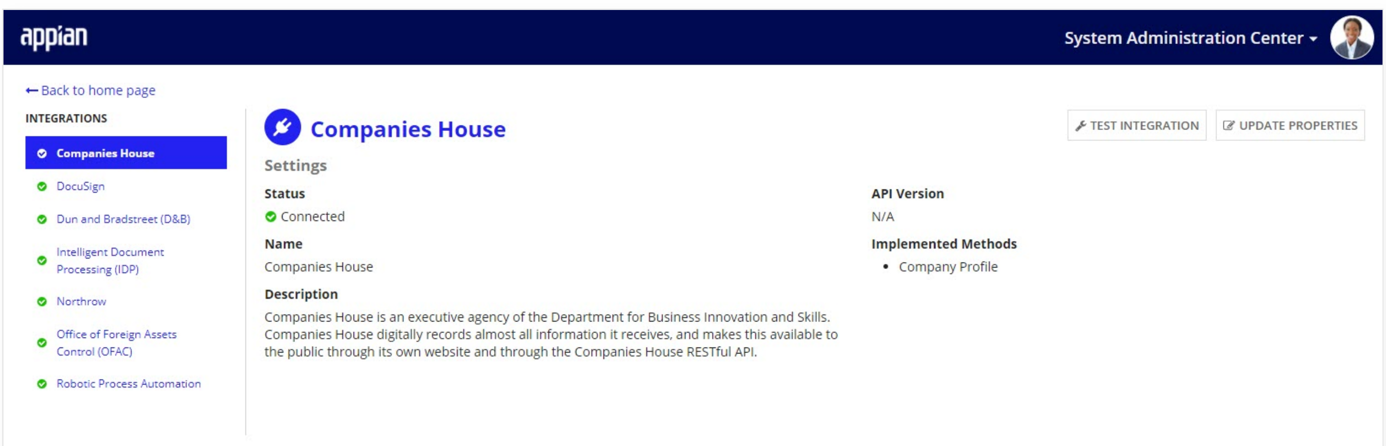
1. Make sure you are in the `AS FS Appian Administrators` security group. See the for more information about security groups.
2. From the **Connected Servicing** site, select the navigation menu ▦ > **System Administration Center**.
3. From the **Welcome to the System Administration Center** page, click the **Integration** card to view and update any connected integrations."



Manage Companies House Integration

Introduction

Appian's Connected Servicing application includes the ability to populate customer data from UK company registration service, Companies House. Connecting to Companies House helps users reduce data entry by pulling in any of the public registration information available from the Companies House service. Using Companies House is optional and requires some minimal configuration in the System Administration Center site after the Companies House prerequisites are completed.



Prerequisites

The Companies House is a public API, but your organization must still generate an authorization key before the service can be used.

To obtain an authorization key:

1. From the Companies House website, create a Companies House account.
2. Follow Companies House instructions to obtain an API key and save this key.

Once you have your Companies House API key:

1. From Appian Designer, open `AS EI CHS CS Companies House` connected system.
2. Click **Clear** next to the **Value** field.
3. Enter your authentication token in the **Value** field.
4. Click **SAVE**.

Using the Companies House integration

Companies House provides registration information about a customer. Any Companies House information gathered is displayed on the **Basic Info** tab on customer profile.

While a customer is a user can provide a **Company Number**. A **Company Number** is the company registration / incorporation number a company was assigned upon registration. If the Companies House integration is connected and a **Company Number** is entered, Companies House will be called and any available information will be automatically populated.

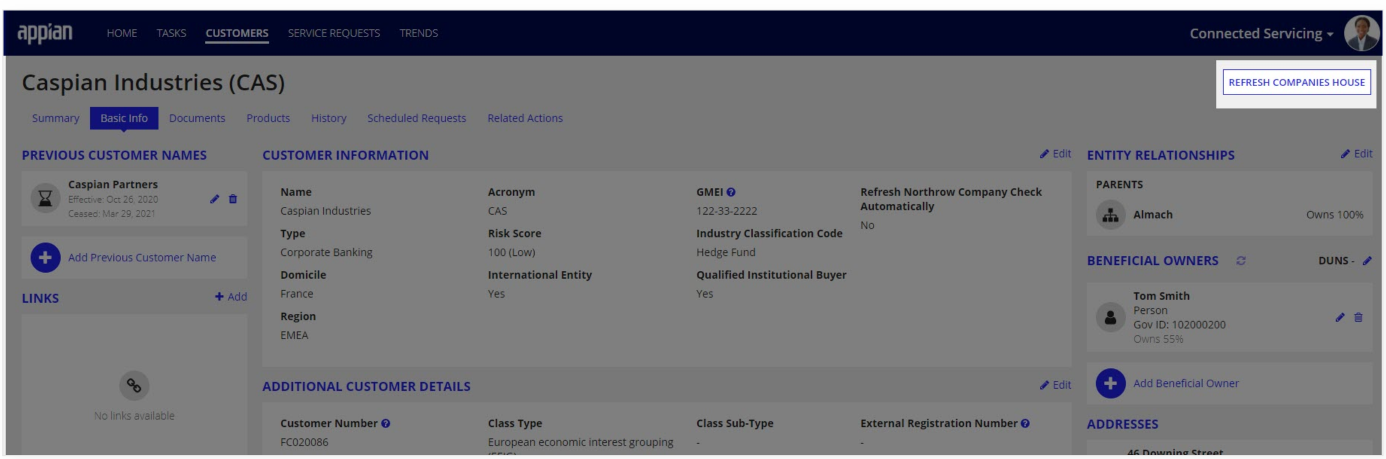
The fields that can be pulled in for Companies House are:

1. **Customer Information**
   - **Class type**: The class type of the customer. Possible values include LTD, PLC, LLP, etc.
   - **Class sub-type**: The subtype of the company. Possible values are: community interest company and private fund limited partnership.
   - **Jurisdiction**: The jurisdiction specifies the political body responsible for the company.
   - **Date of creation**: The date a company was created.
   - **External registration number**: The number given by an external registration body.
   - **Foreign company account information**
     - **Foreign Account type**: Legal form of the customer in the country of incorporation.
     - **Account from**: Date account period starts under parent law.
     - **Account to**: Date account period ends under parent law.
     - **Originating registry name**: Identity of register in country of incorporation.
     - **Originating registry country**: Country in which customer was incorporated.
     - **Credit/Finance Institution**: Is it a financial or credit institution. Valid values: Yes or No.
     - **Must file within**: Number of months within which to file disclosure of accounts under parent law.
     - **Governed by**: Law governing the customer in country of incorporation.
     - **Registration number**: Registration number in customer of incorporation.
     - **Terms of account publication**: Describes how the publication date is derived.
     - **Business Activity**: Type of business undertaken by the UK establishment.
   - **Company type**: Legal form of the company in the country of incorporation.
   - **Company status**: The status of the customer. Valid values include: active, dissolved, liquidation, receivership, administration, voluntary arrangement, converted closed, and insolvency proceedings.
   - **Company status details**: Extra details about the status of the company. Valid values include: transferred from UK, active proposal to strike off, petition to restore dissolved, transformed to SE, converted to PLC, converted to UK SOCIETAS, converted to UKEIG.
2. **Previous customer names**: The previous names of this customer.
   - **Effective from**:The date from which the customer name was effective.
   - **Ceased on**: The date on which the customer name ceased.
3. **Customer links**: A set of URLs related to the resource.
4. **Registered office address**: The address of the customer's registered office.

If Companies House is disconnected or a **Company Number** is not provided, you can enter these fields manually.

Refresh Companies House information

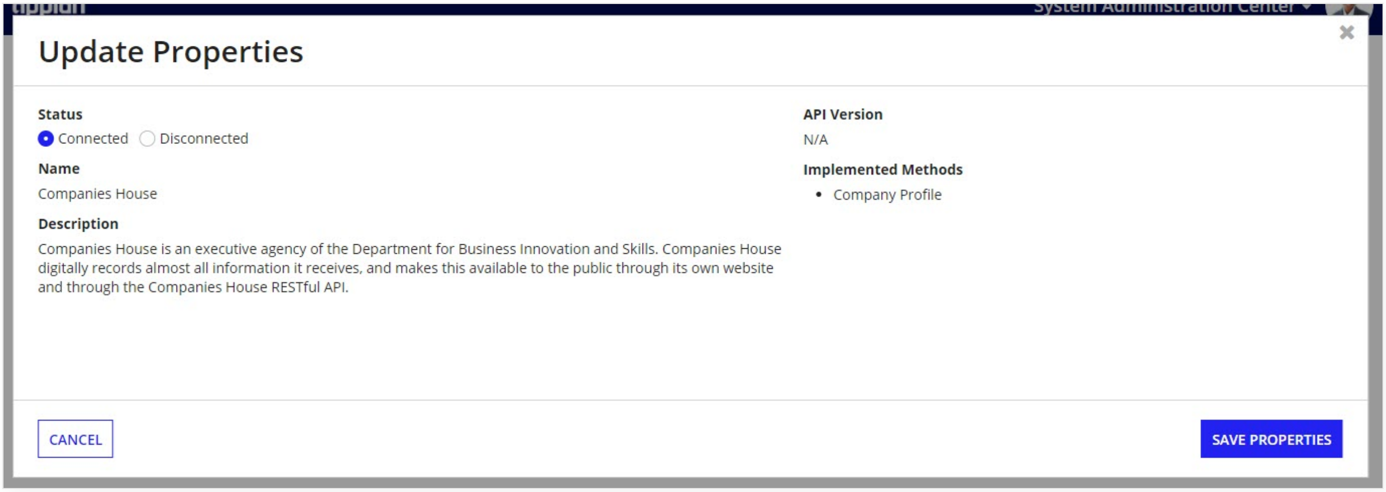
A user can manually check for changes to the information from Companies House from the customer record by clicking **REFRESH COMPANIES HOUSE** on the **BASIC INFO** tab of the customer profile.



The refresh button is not available if the Companies House integration is disconnected.

Update Companies House properties

From the **System Administration Center**, you can determine whether or not the Companies House integration is connected. When Companies House is disconnected you will need to manually enter a customer's registration information.



To update the Companies House properties:

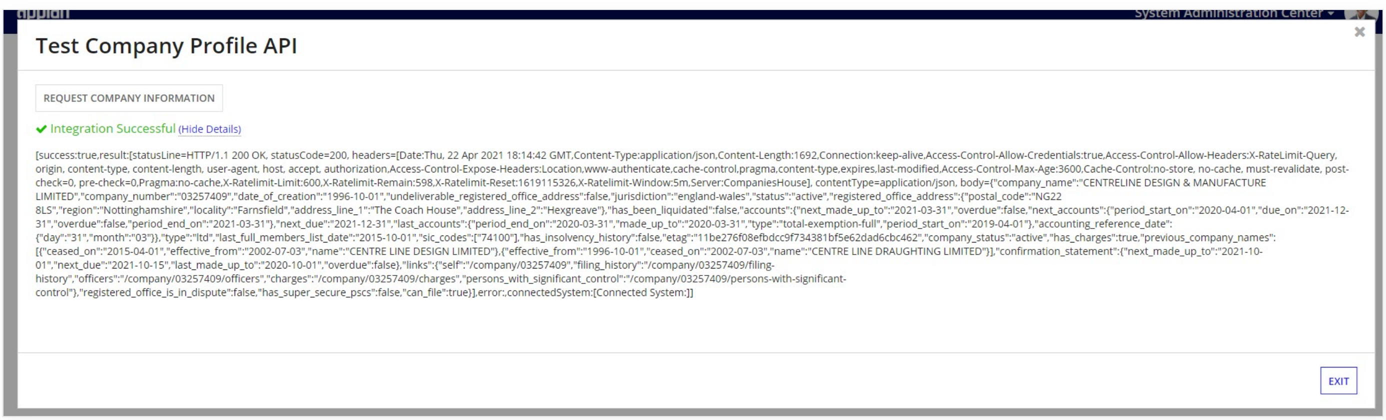
1. After accessing the System Administration Center, click **Integrations**.
2. On the left, select **Companies House**.
3. Click **UPDATE PROPERTIES**.
4. Update **Status**.
5. Click **SAVE PROPERTIES**.

Test Companies House integration

If you suspect that the Companies House integration is not working, you can test to see if this integration is working from the **System Administration Center**.

To test the Companies House connection:

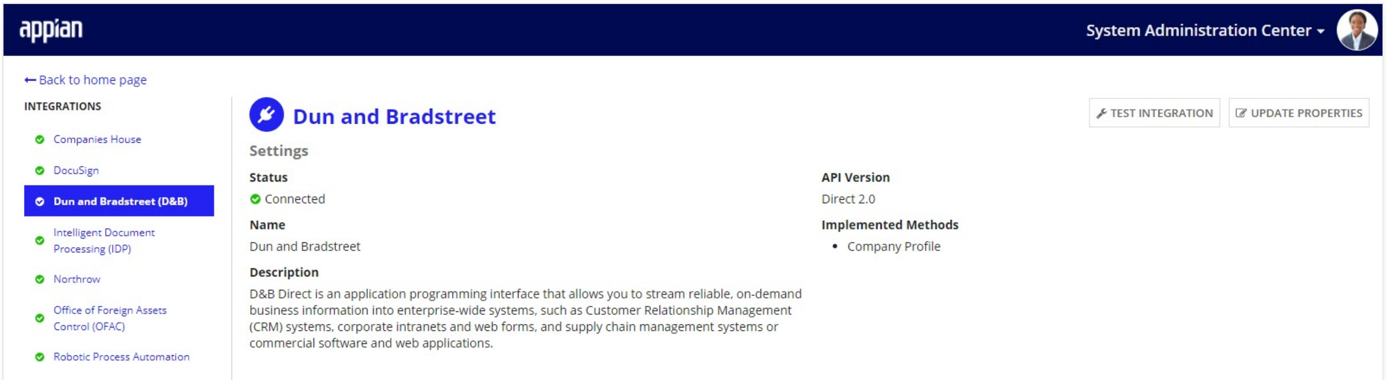
1. After accessing the System Administration Center, click **Integrations**.
2. On the left, select **Companies House**.
3. Click **TEST INTEGRATION**.
4. Click **REQUEST COMPANY INFORMATION**.
    - You are able to see what is returned, either **Integration Successful** or **Integration Error**.
    - You are also able to see the Companies House service response details.



Manage Dun & Bradstreet Integration

Introduction

Appian's Connected Servicing application includes gathering Ultimate Beneficial Owners (UBO) from a Dun & Bradstreet integration. Using Dun & Bradstreet allows users to see the most up to date information about a customer's UBOs. Using Dun & Bradstreet is optional and requires some minimal configuration in the System Administration Center site after the Dun & Bradstreet prerequisite configuration is set up.



Prerequisites

If you would like to use the Dun & Bradstreet functionality, you must have a Dun & Bradstreet account and be able to retrieve your organization's credentials.

Once you have your Dun & Bradstreet authentication information:

1. From Appian Designer, open the `AS EI DNB Bearer Token Connected System`.
2. Enter **User** and **Password**.
3. Click **SAVE**.

Using the Dun & Bradstreet integration

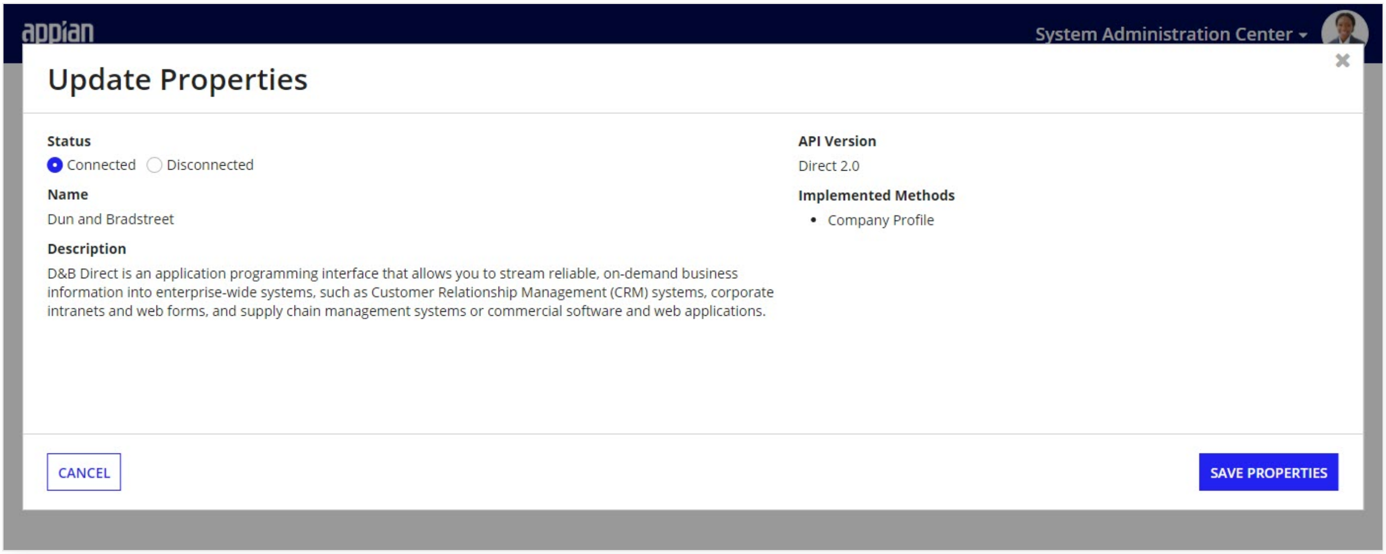
When a customer is created or updated, a user can enter a DUNS number for that customer. A DUNS number is a unique nine-digit identifier for businesses given by Dun & Bradstreet. If a DUNS number is provided and the Dun & Bradstreet integration is connected, Connected Servicing will retrieve UBOs and display them on the profile.

A user can manually check for changes to the UBO in the customer profile by clicking the refresh button next to the BENEFICIAL OWNERS section.

The refresh button is not available if the Dun & Bradstreet integration is disconnected or a DUNS number is not provided.

Update Dun & Bradstreet properties

From the **System Administration Center**, a user can determine whether or not the Dun & Bradstreet integration is connected. When Dun & Bradstreet is disconnected a user will not be able to use Dun & Bradstreet to gather or refresh the beneficial owners.



To update the Dun & Bradstreet properties:

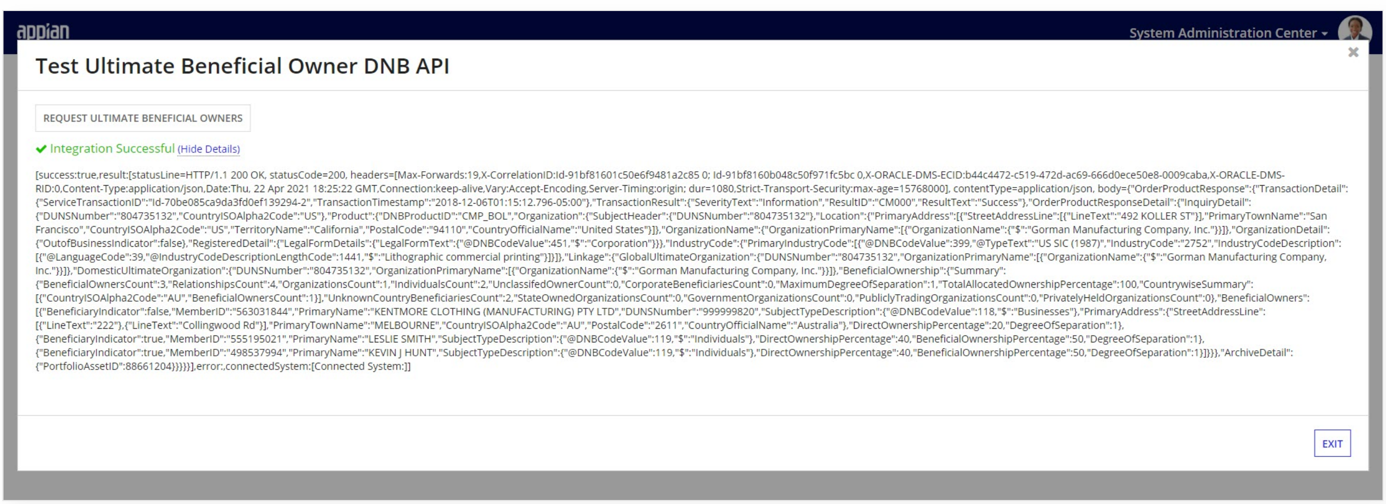
1. From the System Administration Center, click **Integrations**.
2. Select Dun & Bradstreet on the left hand navigation pane.
3. Click **UPDATE PROPERTIES**.
4. Update **Status**.
5. Click **SAVE PROPERTIES**.

Test Dun & Bradstreet integration

If you suspect that the Dun & Bradstreet integration is not working, you can test to see if this integration is working from the **System Administration Center**.

To test the Dun & Bradstreet connection:

1. From the System Administration Center, click **Integrations**.
2. Select Dun & Bradstreet on the left hand navigation pane.
3. Click **TEST INTEGRATION**.
4. Click **REQUEST ULTIMATE BENEFICIAL OWNERS**.
   - You are able to see what is returned, either **Integration Successful** or **Integration Error**.
   - You are also able to see the Dun & Bradstreet service response details.



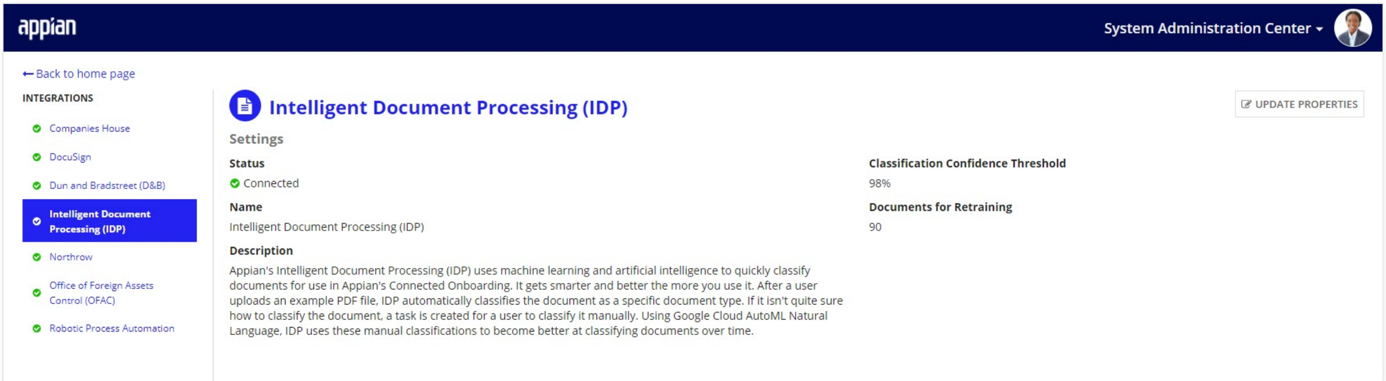
If both of these tests work, the service is up and connecting properly.

Manage Intelligent Document Processing Integration

Introduction

Appian's Connected Servicing application includes automated document classification powered by Appian's Intelligent Document Processing (IDP). This process is used to help save users time by automatically classifying the types of documents that are uploaded to Connected Servicing. Using

IDP is optional and requires some minimal configuration in both the and System Administration Center sites after the prerequisites are complete.



Prerequisites

In order to use this functionality as shipped, make sure that Google Cloud is set up.

Google Cloud set up for Appian AI customers

If you have opted in to being an Appian AI customer, contact your Appian technical contact administrator. The technical contact will have received the service account credentials, bucket names, and region information in the License Management site on Appian Community.

Your technical contact administrator is listed on the Accounts page on Community, under Administrators. Note that you must be registered with your company on Community to access this site.

Google Cloud set up for Non-Appian AI customers

If you have purchased Google Cloud separately, follow these steps to set up AutoML Natural Language and create your Google Service Account and key.

> AutoML Natural Language and Document AI can share Google service accounts (for authentication) and storage buckets (for prediction and extraction).

To set up Google Cloud AutoML Natural Language:

1. **Create or select project:** As the Project Owner, log in to the Google Cloud console and select an existing project or create a new project.
2. **Enable billing:** Ensure that billing is enabled for your project.
3. **Enable APIs:** Enable the `Cloud AutoML API`, `Google Cloud Storage JSON API`, and `Cloud Document AI API`.
4. **Create storage buckets:** Create Cloud Storage buckets that follow the bucket requirements to store the AutoML Natural Language files:
    - For us-central1:
        - Location type: `Region`
        - Location: `us-central1`
        - Storage class: `Standard` (sometimes displayed in the Cloud Storage browser as Regional)
    - For eu:
        - Location type: `Multi-region`
        - Location: `eu`
        - Storage class: `Standard` (sometimes displayed in the Cloud Storage browser as Multi-Regional)

> You may choose to have two buckets: one for the training documents and one for the prediction documents. Or, you can use the same storage bucket for both. If you use two buckets, then they must be in the same regional location.

To create your Google Service Account and key:

1. Create a Google Service Account in the Google Cloud Console with AutoML Admin and Storage Admin permissions
2. Create the service account key and save the file as a JSON document.

Update IDP specific constants

You will need update the constants to match your configuration from your Google Cloud set up.

Constants to update from Appian Designer are:

1. `AS_FS_IDP_CLOUD_REGION` - value should be your Google Cloud region.
2. `AS_FS_IDP_CLOUD_PROJECT_ID` - value should be your Google Cloud project ID.
3. `AS_FS_IDP_AUTOML_CLOUD_BUCKET` - value should be your Google Cloud Auto ML bucket.
4. `AS_FS_IDP_STORAGE_CLOUD_BUCKET` - value should be your Google Cloud storage bucket.

Update the connected system (only EU storage buckets)

If your storage bucket is in the eu multi-region, you will need to update the compute region for two of the connected systems.

To update the connected systems:

1. From **Appian Designer**, open the `AS FS IDP Google Cloud AutoML` connected system.
2. Update the **Compute Region** to eu.
3. Open the `AS FS IDP Google Cloud Storage` connected system.
4. Update the **Compute Region** to one of the Europe regions. These region options start with `europe-`.

Document classification with IDP process overview

When a user uploads a document in Connected Servicing, the system:

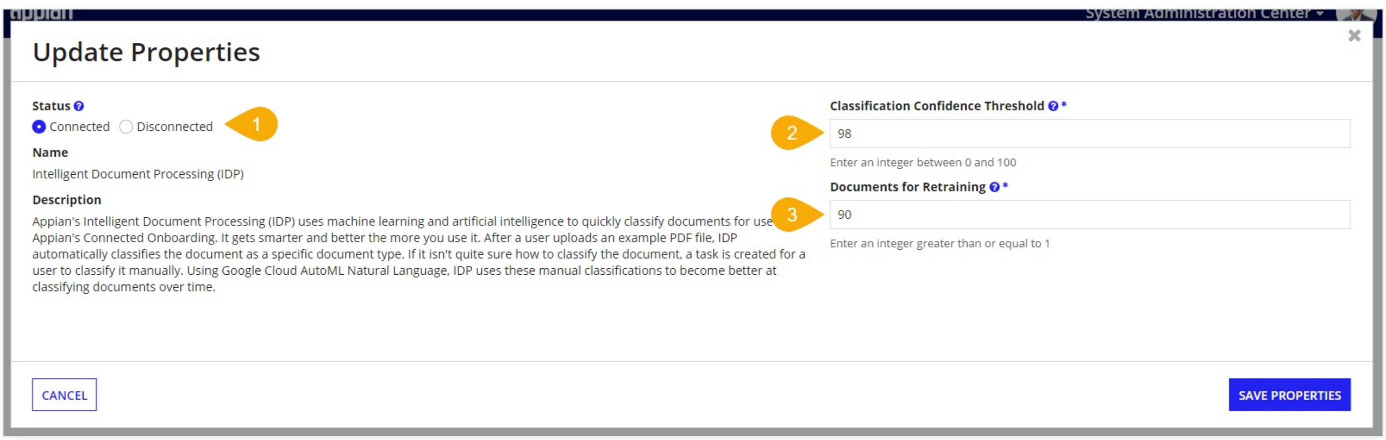
1. Checks if IDP is turned on.
2. Determines if the document uploaded matches an uploaded example document.
3. Assigns matching example document type to the uploaded document and determines **TYPE CONFIDENCE** level.
4. If a **TYPE CONFIDENCE** level is below the **CONFIDENCE THRESHOLD**, a document reconciliation task is assigned to a user.
   - **Note:** the **CONFIDENCE THRESHOLD** can be changed.

If IDP is not turned on, users will need to manually select **DOCUMENT TYPE** for an uploaded document.

Update IDP Properties

There are several IDP properties users can update from the **System Administration Center** including:

1. **Status:** Whether or not IDP is connected.
   - **Note:** When IDP is disconnected a user will not be able to for document types.
2. **Classification Confidence Threshold:** The percentage of confidence that the data must meet when it is extracted from a document. If it doesn't meet this threshold, the value will not be automatically populated. During the reconciliation task, a user will need to provide the value.
   - **Tip**: As with the classification threshold, a higher confidence percentage will increase auto-extraction accuracy, but it will also increase the number of fields that need to be populated by the user.
   - **Note:** This will only show when IDP is connected.
3. **Documents for Retraining:** The number of documents that will need to be classified before triggering the retraining of the AI classification machine learning model. This enables the AI classification model to improve over time. A lower number allows the model to learn more quickly, but also increases the Google Cloud Platform costs. This could cause you to hit your Appian AI or Google account limits more quickly.
   - **Note:** This will only show when IDP is connected.



To update the IDP properties:

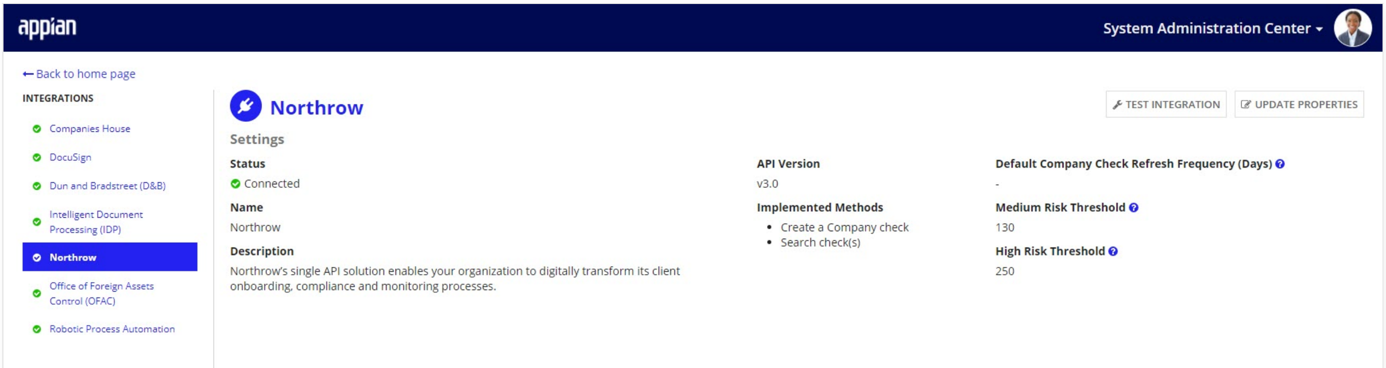
1. From the **System Administration Center**, click **Integrations**.
2. Select **Intelligent Document Processing (IDP)** on the left hand navigation pane.
3. Click **UPDATE PROPERTIES**
4. Update either **Status**, **Classification Confidence Threshold:**, or **Documents for Retraining**.
5. Click **SAVE PROPERTIES**.

Once your IDP properties are set, be sure to in the Connected Servicing Settings site. If no classification files are updated, a task will be assigned for a user to manually select the **Document Type**.

Manage Northrow Integration

Introduction

Appian's Connected Servicing application includes the ability to display a customer risk score and show alerts generated by Northrow's customer profiles. Using Northrow is optional and requires some minimal configuration in both the and System Administration Center sites after the Northrow prerequisite configuration is set up.



Prerequisites

If you would like to use the Northrow functionality, you must have a Northrow account and be able to retrieve your organization's credentials and profile unique IDs (UIDs).

Once you have your Northrow authentication information:

1. From Appian Designer, open the `AS EI NORTHROW Bearer Token Connected System`.
2. Enter **Organisation UID** and **Access Key**.
3. Click **SAVE**.
4. Open the `AS_EI_NORTHROW_TXT_PROFILE_UID_COMPANY_CHECK_INTERNATIONAL` constant.
5. Update the **Value** to your organizations international profile unique ID.
6. Click **SAVE**.
7. Open the `AS_EI_NORTHROW_TXT_PROFILE_UID_COMPANY_CHECK_UK` constant.
8. Update the **Value** to your organizations UK profile unique ID.
9. Click **SAVE**.

Using the Northrow integration

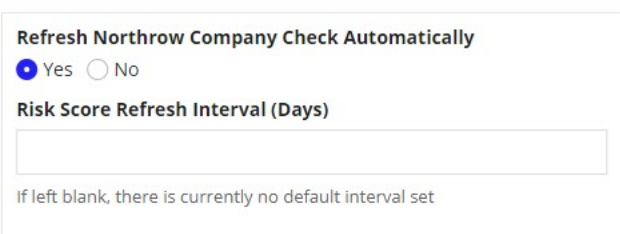
When a customer is created, the Northrow integration is called using the company name and domicile to retrieve a company's risk score and any alerts about the customer. The risk score and alerts are displayed on the record.

When the Northrow company check is called, Northrow also provides a detailed risk score report. Once generated, the report is available for download from the **DOCUMENTS** tab of the customer record.

Refresh Northrow company check

Each customer can have their risk score refreshed automatically on a regular schedule or manually.

When creating or editing a customer, a user can select whether or not to automatically refresh the Northrow company check. If a user selects to refresh automatically, they can then set the number of days between automatic refreshes. If the refresh interval is left blank, the default interval is used, which can be changed by updating the Northrow properties in the System Administration Center.

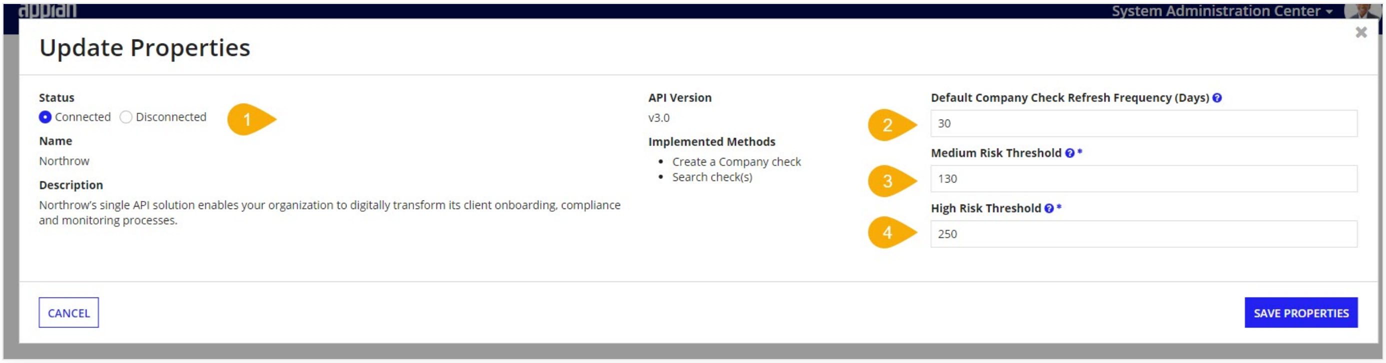


A user can manually check for changes to the risk score or alerts from the customer record by clicking the refresh button. The refresh button is not available if the Northrow integration is disconnected.

Update Northrow properties

There are several Northrow properties users can update from the **System Administration Center** including:

1. **Status**: Whether or not Northrow is connected.
2. **Default Company Check Refresh Frequency (Days)**: Determines the frequency at which a Northrow company check will be executed when the frequency is not set explicitly for an individual customer. When blank, no default checks will be initiated.
3. **Medium Risk Threshold**: The minimum risk score numerical value that will qualify a customer to be medium risk.
4. **High Risk Threshold**: The minimum risk score numerical value that will qualify a customer to be high risk.



To update the Northrow properties:

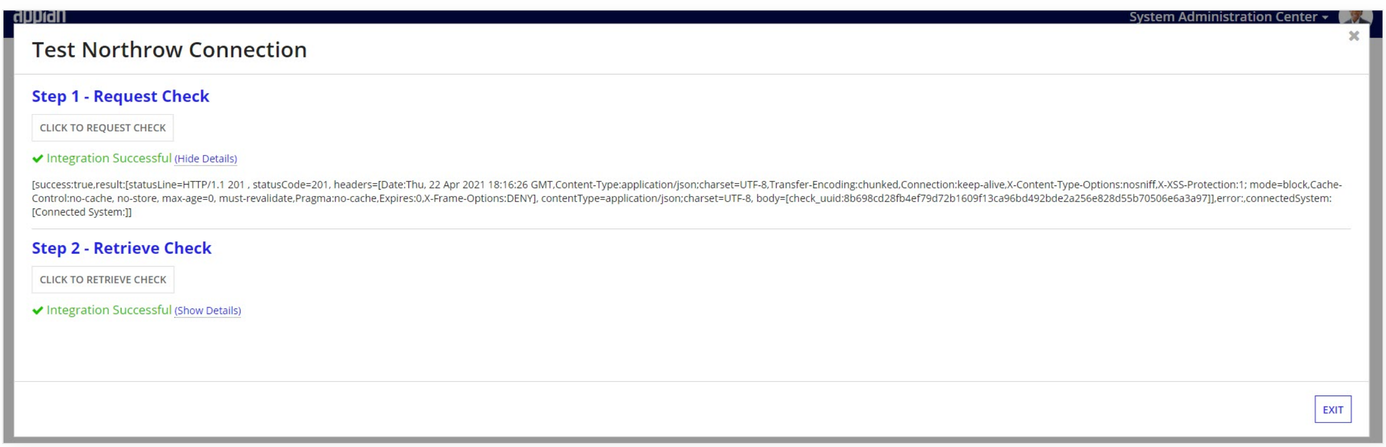
1. From the System Administration Center, click **Integrations**.
2. On the left, select **Northrow**.
3. Click **UPDATE PROPERTIES**.
4. Update either **Status**, **Default Company Check Refresh Frequency (Days)**, **Medium Risk Threshold**, or **High Risk Threshold** available.
5. Click **SAVE PROPERTIES**.

Test Northrow integration

If you suspect that the Northrow integration is not working, you can test to see if this integration is working from the **System Administration Center**.

To test the Northrow connection:

1. After accessing the System Administration Center, click **Integrations**.
2. On the left, Select **Northrow**.
3. Click **TEST INTEGRATION**.
4. To check the connection to Northrow, click **CLICK TO REQUEST CHECK**.
    - You are able to see what is returned either **Integration Successful** or **Integration Error**.
    - You are also able to see the Northrow service response details.
5. To check that the data retrieval is working, click **CLICK TO RETRIEVE CHECK**.
    - You are able to see what is returned either **Integration Successful** or **Integration Error**.
    - You are also able to see the Northrow service response details.



If both of these tests work, the service is up and connecting properly.Connected Servicing

Modifying Groups

Introduction

When adding users to Appian Connected Servicing, they initially won't have access to see or do much in the application. In order to give them access to the information and actions that they need to do their jobs, you must add them to the appropriate groups.

Connected Servicing comes with default groups that make it easy to grant the appropriate access to users. The application uses business groups that represent the different business roles that will interact with the application. For example, **Client Servicing** and **Sales Department Heads**. These business groups are members of security and wrapper groups, which grant access to different parts of the application, such as starting a new servicing request or viewing customer information.

By placing users into the business groups, the application automatically assigns them the appropriate access for their business role. To understand what groups to put users in depending on the actions that they need to perform, see Actions users can perform based on their group membership on the Groups Reference Page. This page also gives more information on what business groups belong to which security and wrapper groups.

When you are setting up the application, you will need to understand what business roles are required for your organization and modify the groups to fit your organization. You will also need to add users to the appropriate groups. This page outlines how to do both.

Modifying group membership

To give users appropriate access to Connected Servicing, you must first add them to the necessary business and security groups. Generally, it is a best practice to only place users inside of business groups, not security groups. However, there are some security groups where it is preferable to grant membership to individual users.

For example, the **AS FS Manage Processes** security group grants access to the Connected FS Settings site and allows users to modify service request processes. Since Connected FS Settings is an administrative page, you may want to control access on an individual user level. For example, rather than giving access to all users in the Client Servicing group, you may want to limit it to a couple of individuals. In this case, you would add users to the security group, instead of adding a business group to the security group.

You can manage group membership either manually or automatically.

Manually modifying membership

Modifying group membership can be done from two places in Connected Servicing: the Connected FS Settings site or Appian Designer.

Business users can use the Connected FS Settings site to modify users in business groups. See Managing Group Membership for instructions on how to do this.

Administrators can also use Appian Designer to manage group membership. See Group Management for more information on this. However, Appian highly recommends that you use the Connected FS Settings site to manage all group memberships. Using Appian Designer to update group membership for Connected Servicing may cause unwanted visibility changes or security vulnerabilities.

Automatically syncing group membership

You can also configure an Appian process model to run periodically, typically nightly, which can automatically add users to different groups. This is typically hooked into an LDAP integration to ensure the LDAP system is what actually controls user access to groups. See the LDAP Synchronization Playbook article for more information about setting this up.

Syncing with LDAP would likely overwrite group memberships that were set using the Connected FS Settings site.

If you implement automatic syncing, you have two options:

- You can leave the Groups & Users section of Connected FS Settings visible to end users so that they can use it to grant access right away, without waiting for the sync. If you choose this option, make sure that end users know that they need to make changes in the LDAP system as well as Connected Servicing and that their changes in Connected Servicing will be overwritten by the changes to the LDAP system.
- You can hide the Groups & Users section of Connected FS Settings by not adding any users to the **AS IO GM Manage Group Membership** group. This is the group that grants access to that section of the site.

Adding new business groups

If your organization has different business roles that the default business groups don't cover, you can create additional groups using Appian Designer.

To add a new business group:

1. Create a business group for the new business role.
    - Set the **Visibility** to **Public (everyone)**. This will allow users to select the group in pickers in the application.
    - Set the appropriate **Parent Group**. Reference an existing business group to see how this is configured.
2. Add the group to the proper wrapper and security groups so users will be given the appropriate access to the application functionality.
3. Add users to the group.

Adding new security groups

If you configure additional functionality in the application, such as adding new records or related actions, it is recommended that you create a security group. Learn more about object security.

For example, the **AS FS Create or Update Customer** process model has associated security groups called **AS FS Create Customer** and **AS FS Update Customer**.

To add a new security group for an object:

1. Create a security group for the new Appian object.
    - Set the **Visibility** to **Personal (only admins)**. This makes sure that users will not be able to select this group from pickers in the application.
2. Make the new security group a viewer on the Appian object.
3. Add the appropriate business groups to the security group to give them access to the new functionality.

Setting Default System Behavior

Introduction

Every organization's needs are unique. That's why Connected Servicing comes with out-of-the-box functionality to configure the service request experience and comply with your company standards. All it takes is making some small changes.

This page explains how to change the following application behaviors:

- Changing default product fields.
- Turning integrations on or off.
- Setting task due dates
- Setting the default currency.
- Setting email notifications for discussions

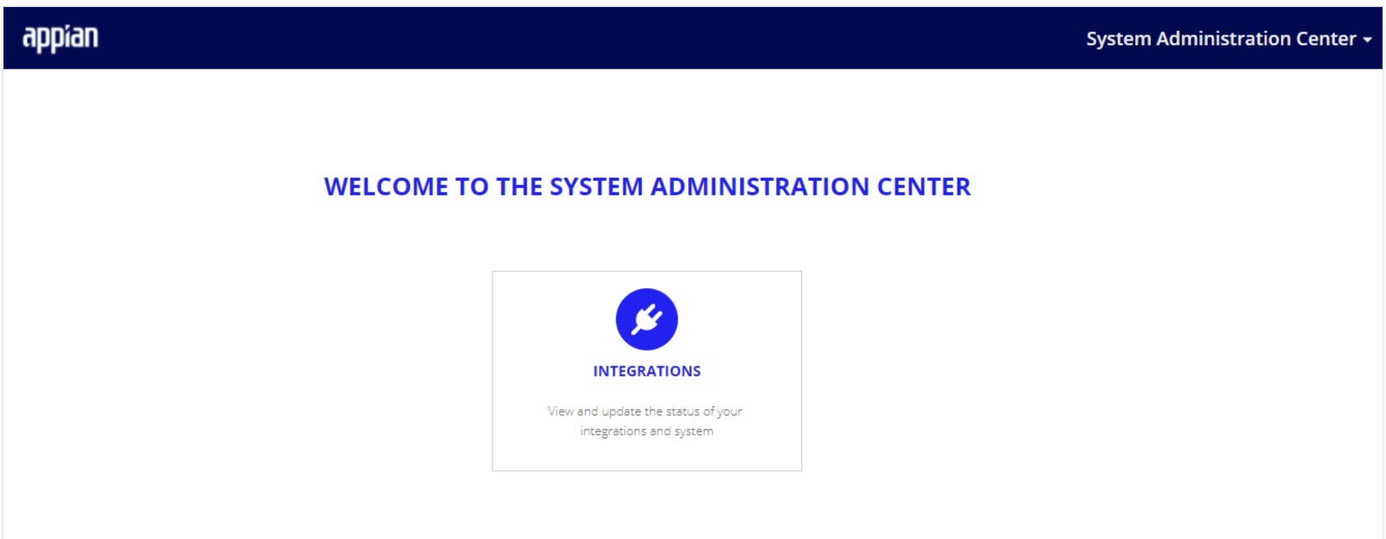
Changing default product fields

When a user adds a product to a customer, the user is required to fill out specific product-related details. Each product may have its own unique fields that the user is required to complete. By default, there are 35 fields that can be associated with the product types.

If you want to change the product fields or sections available, you will need to modify them.

Turning integrations on or off

Several integrations come with functionality that you can switch on and off depending on if your organization uses the services or not. To change the status of these services from connected to disconnected, use the **SYSTEM ADMIN CENTER**.



Setting task due dates

When setting up templates, task due dates are configured based on key dates. By default, you are able to choose dates before or after a service request's target completion date. If there is a separate key date that a task's due date should be calculated from, you can modify key dates.

Setting the default currency

If your default currency is something other than the United States Dollar (USD), change the value of the `AS_CO_TXT_DEFAULT_CURRENCY_CODE` constant to the currency code of your choice.

A list of supported currencies can be found in the `AS_FS_R_CURRENCY` table.

Setting email notifications for discussions

To determine if an email notification will be sent for discussions posts, you will need to update the `AS SRQ RC Write Comment` process model.

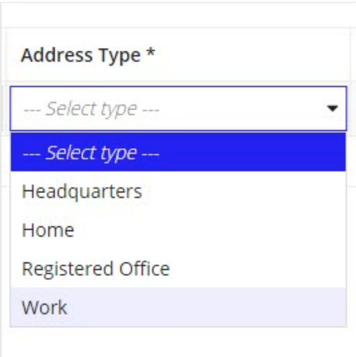
To update the notification settings:

1. From Appian Designer, open the `AS SRQ RC Write Comment` process model.
2. Open the `XOR` node called `Email enabled and recipients not empty?`.
3. Set the node to `true` if you want emails to be sent or set the node to `false` to turn these emails off.

Modifying Dropdown List

Introduction

The Connected Servicing solution is designed to be customized to your organization's particular needs. The various interfaces in the out-of-the box solution contain dropdown lists. Some dropdown values such as Document Type and Customer Type, a business user can change in the Connected FS Settings Site. However, if you need to modify a dropdown field that is not accessible through Connected FS Settings, you can modify the values by modifying reference data tables. For example, you can add or delete values that display in the Address Type dropdown list.



This page outlines how to modify the values that can be chosen from dropdown lists in the various interfaces of the Connected Servicing solution.

- If you need to add a value to a particular dropdown list, add a row to the reference data table. See the Adding new dropdown values section.
- If you need to remove a value from a dropdown list, deactivate the value in the reference data table. See the Deactivating a dropdown value section.
- If you want to add a new dropdown list, create a new dropdown list type in the reference data table. See the Adding a new dropdown list section.
- If you are using the application in multiple languages, see the nuances of this in the Internationalizing dropdown list values section.

See the Reference Data Tables page for descriptions of the table structures.

Adding new dropdown values

Dropdown values that cannot be set in the Connected FS Settings site are stored in the `AS_SRQ_R_DATA` table. Updating this table allows you control what dropdown values and lists display to end users moving through the servicing request process. See the Connected Servicing only reference data table on the Reference Data Tables page for a description of the table structure.

To add a value to a dropdown list:

1. Insert a new row into the `AS_SRQ_R_DATA` table.
2. Update each column with the following information:
    - R_DATA_ID: This is the primary key of the reference value.
        - **Note**: The first 100,000 rows of this table are reserved for future use by the Appian Connected Servicing product team to avoid conflicts when upgrading to a newer version of the solution.
        - **Note**: When adding a new row to this table, leave this value as `NULL`. There is a default `AUTO_INCREMENT` setting on this table, so that any new rows you insert with a `NULL` primary key will begin at 100,000 and increment from there.
    - LABEL: The new bundleKey value you will reference in your bundle file.
    - TYPE: A grouping category for the dropdown values; a name for the dropdown list.
        - **Note**: The label for a dropdown list is defined in a bundle file, so this isn't necessarily the same as the label for a dropdown list.
    - CODE: The dropdown list type prefix with a descriptive suffix.
    - SORT_ORDER: Optional field that can be used specifying sort order
        - **Note**: Queries will have to be updated to query against this column for this to be implemented
    - ICON: Optional field that can be used to specify icon for this entry
    - COLOR: Optional field that can be used to specify color for the icon
    - IS_ACTIVE: true (1)
    - CREATED_BY: Your Appian username.
    - CREATED_DATETIME: The current timestamp, in the format YYYY-MM-DD HH:MM:SS.
    - MODIFIED_BY: Your Appian username.
    - MODIFIED_DATETIME: The current timestamp, in the format YYYY-MM-DD HH:MM:SS.

After the row is inserted, this value will be available in any of the dropdown lists that have the same reference `TYPE` as the value you inserted.

EXAMPLE

To add a new dropdown value, you could use the following SQL statement, replacing the values in brackets (< >) with your data. Note that this example uses MySQL syntax.

```

```

```
INSERT INTO `AS_SRQ_R_DATA` (`R_DATA_ID`, `LABEL`, `TYPE`, `CODE`, `IS_ACTIVE`, `CREATED_BY`, `CREATED_DATETIME`, `MODIFIED_BY`,
VALUES (null, '<New Label>', '<Type>', '<Code>', 1, '<Username>', CURRENT_TIMESTAMP(), '<Username>', CURRENT_TIMESTAMP()),
(null, '<New Label>', '<Type>', '<Code>', 1, '<Username>', CURRENT_TIMESTAMP(), '<Username>', CURRENT_TIMESTAMP());
```

Deactivating a dropdown value

If there is a value in a dropdown list that is no longer needed, deactivate the value by changing the `IS_ACTIVE` value in the `AS_SRQ_R_DATA` from 1 (true) to 0 (false).

> Deactivating a service request status or task status is not recommended nor supported, as it will negatively affect other aspects of the application because logic within the application is based on these values.

After the update is made, this value will no longer display in any dropdown list. The value will still display for already active and historical data.

> Deleting data from the table is not recommended except during initial set up. If the application is already in use, deleting data rather than deactivating it may cause issues.

EXAMPLE

To deactivate a dropdown value, you could use the following SQL statement. Replace `<ID Being Updated>` with the R_DATA_ID value. For example, to deactivate the **FEE_RATE_MONTHLY** in the following example table, `<ID Being Updated>` with the `R_DATA_ID` value.

R_DATA_ID	LABEL	TYPE	CODE	IS_ACTIVE
24	FeeRate.lbl_Annual	Fee Rate	FEE_RATE_ANNUAL	1
25	FeeRate.lbl_Monthly	Fee Rate	FEE_RATE_MONTHLY	1

Note that this example uses MySQL syntax.

```
UPDATE AS_SRQ_R_DATA SET IS_ACTIVE = 0 WHERE R_DATA_ID = <ID Being Updated>
```

Adding a new dropdown list

If you want to add a new dropdown list, you need to create a new dropdown list type.

There are two main steps to add a new dropdown list:

1. Add a new row to the `AS_SRQ_R_DATA` table. See Adding new dropdown values for instructions on how to add new rows.
    - For the value in the `TYPE` column, enter a name for the new dropdown list, such as *Entity Region*.
    - For the value in the `CODE` column, enter a short prefix to associate with the new dropdown list type, along with a number to give it a unique identifier. For example, *ENTITY_REGION_ASIA*.
2. Create a constant in the application to be able to query this from the database. See Using a new dropdown list in the application for instructions on how to set this up.

Using a new dropdown list in the application

After a new dropdown list type has been added to the `AS_SRQ_R_DATA` table, it will need a constant to point to it in order to be used in interfaces.

1. Go to the **AS SRQ Full Application** application in Appian Designer.
2. Create a new constant called `AS_SRQ_REF_TYPE_`*<NEW_DROPDOWN_LIST_TYPE>*. For example `AS_SRQ_REF_TYPE_SERVICE_REQUEST_STATUS`.
    - Type: **Text**
    - Value: *<New Dropdown List Type>*
        - **Note:** This needs to exactly match the dropdown list name in the `TYPE` column of the `AS_SRQ_R_DATA` table. For example, if the name in the `TYPE` column is *Service Request Status*, the value here must be the same.
    - Save it in the **AS SRQ SAIL Design Objects** folder.

After the dropdown list constant has been created, the list is ready to be used by the `AS_SRQ_QE_getRefDataByType` rule. This rule pulls all of the reference data onto the interface that needs a reference value. `AS_SRQ_QE_getRefDataByType` takes in typelist—an array of text—corresponding to the type values in the database you need to use.

EXAMPLE

To pull in the Fee Rate or Entity Type dropdown lists, you would use the rule as shown below:

```

```

```
local!refData: rule!AS_SRQ_QE_getRefDataByType(
  typelist: {
    /* Comment Type */
    cons!AS_SRQ_REF_TYPE_COMMENT_TYPE,
    /* Service Request Status Type */
    cons!AS_SRQ_REF_TYPE_SERVICE_REQUEST_STATUS
  }
)
```

As shown in the example, you can pass in either text or a constant of type text with the corresponding dropdown list type.

> Remember that `AS_SRQ_QE_getRefDataByType` is a query. In order to minimize the number of queries, it is best practice to avoid calling your reference data in sub-interfaces. Instead, query for all of the reference data on the main form and pass it to the sub-interfaces using rule inputs.

Internationalizing dropdown list values

If you are using Connected Servicing in multiple languages, the reference data needs to be internationalized in order to show the user the dropdown values in their native language.

To do so, you will only need one entry in the `AS_SRQ_R_DATA` table for each value, but you will need to have a bundle (or document file) based on the default language that the user has selected.

The `LABEL` column of `AS_SRQ_R_DATA` will act as a key for the application to show the proper label based on which bundle is selected. The `LABEL` is comprised of `<bundleName>.<labelName>`.

EXAMPLE

For example, the `LABEL` FeeRate.lbl_Annual has a bundle called FeeRate and a label name lbl_Annual.

R_DATA_ID	LABEL	TYPE	CODE	IS_ACTIVE
23	FeeRate.lbl_Annual	Fee Rate	FEE_RATE_ANNUAL	1

The `FeeRate_en_US` bundle will show the following:

```
...
lbl_Annual=Annual
lbl_Monthly=Monthly
...
```

The `FeeRate_es` bundle will show the following:

```
...
lbl_Annual=Anual
lbl_Monthly=Mensual
...
```

Both dropdown values use the same `LABEL` to reference the correct translation.

After the additional translations are in the bundle, end users will be able to view the dropdown values in their native language.

If you are adding a new language, you will also need to update the labelsbin the application to use the language. See Modifying UI Text for how to do this.

Other reference data tables

There are several other tables that contain reference data that appear in lists. The information stored in these tables are universal and shouldn't change often. However, if you ever have to change the list of countries, currencies, industry classification codes, or states, refer to the below tables.

- AS_FS_R_COUNTRY
  - A list of countries
- AS_FS_R_CURRENCY
  - A list of currencies
- AS_FS_R_GLOBAL_INDUSTRY_CLASS
  - Industry classification codes and names
- AS_FS_R_M_CURRENCY
  - A mapping of currencies to countries
- AS_FS_R_STATE
  - A list of US states

Modifying Record Fields

Introduction

Each organization's processes are unique and often complex. Connected Servicing is flexible enough to allow you to modify all of the form and data fields that you use to collect and view information for each service request.

The two main records that hold this data are the service request and customer records. This page provides guidance for adding or modifying fields for the two main records.

The methods discussed on this page apply to other records as well. The main difference is that other records don't have record lists on the Connected Servicing site, so you don't need to update the record list database views and CDTs.

Adding fields

If you need to capture more data than what exists in the default Connected Servicing application, you can add fields to the custom data type (CDT).

There are four main steps to add fields to the service request and customer records.

Step 1: Update the database table

Add the extra column with the appropriate type into the database table.

For the service request records, the name of this table is `AS_SRQ_SERVICE_REQUEST`. For customer records, it is `AS_FS_CUSTOMER`.

Step 2: Update the CDT

Add the extra field to the corresponding CDT, making sure the column name matches that of the column name in the CDT's XSD file.

The two main CDTs for the records are `AS_SRQ_ServiceRequest` and `AS_FS_Customer`.

See Mapping Custom Data Types (CDTs) to Pre-defined Database Tables for more information about making changes to CDTs.

Step 3: Verify the data store

Verifying the data store makes sure that the CDT is mapped and ready to be used in your process.

To verify the data store:

1. Navigate to the data store that holds the CDT.
    - **Note**: `AS_SRQ_ServiceRequest` and `AS_FS_Customer` are in `AS SRQ Data Store` and `AS FS Tables` data stores respectively.
2. Click **VERIFY**.
3. Make sure an "Entity mappings verified" message displays.
    - If this message does not display, the database table or CDT updates may not match the data store.
4. Click **SAVE & PUBLISH**.

See Data Stores for more information about editing data stores.

Step 4: Add the new field to desired interfaces

You may also want to update the interfaces that use the CDT in order to capture and display the new data. We recommend making copies of the default objects. See Best practices for modifying objects for more information.

The main interfaces are listed below, but there may be many more.

For the service request record, the main interfaces are:

- `AS_SRQ_FM_servicingSummary`: Summary view of the service request record.
- `AS_SRQ_FM_createServiceRequest`: Allows users to populate the data fields for a service request.

For the customer record, the main interfaces are:

- `AS_FS_FM_customerSummary`: Summary view of the customer record.
- `AS_FS_FM_customerDetails`: Allows users to populate the data fields for a customer.

Modifying fields

Modifying fields in a CDT requires more care than just adding fields to a CDT. This is because every reference to an existing field must be updated if the name or data type changes.

There are four main steps to modifying the fields of the `AS_SRQ_ServiceRequest` or `AS_FS_Customer` CDT.

> Always follow Appian best practices when modifying CDT fields. See Mapping Custom Data Types (CDTs) to Pre-defined Database Tables for more information on updating a CDT.

Step 1: Update the database table

The first step in modifying CDT fields is to change the data structure in your database table.

For the service request records, the name of this table is `AS_SRQ_SERVICE_REQUEST`. For customer records, it is `AS_FS_CUSTOMER`.

See Mapping Custom Data Types (CDTs) to Pre-defined Database Tables for more information about making changes to the database tables.

Step 2: Update the database view

Because the application contains the service request and customers record lists, you need to update the database view that backs the record list.

For the service request records, the name of this view is `AS_SRQ_V_SERVICE_REQUEST` . For customer records, it is `AS_FS_V_CUSTOMER`.

Step 3: Update the CDTs

Update the fields in the CDTs for both the record and record list.

For the service request records, the name of these CDTs are:

- `AS_SRQ_ServiceRequest`
- `AS_SRQ_V_ServiceRequest`

Step 4: Update the associated objects

Update the interfaces, expression rules, and process models that use the CDT. If you do not update the objects that reference the field you updated or deleted, the objects will break. We recommend making copies of the default objects. See Best practices for modifying objects for more information.

The main interfaces are listed below, but there may be many more.

For the service record, the main interfaces are:

- `AS_SRQ_FM_servicingSummary`: Summary view of the service request record.
- `AS_SRQ_FM_createServiceRequest`: Allows users to populate the data fields for a service request.

For the customer record, the main interfaces are:

- `AS_FS_FM_customerSummary`: Summary view of the customer record.
- `AS_FS_FM_customerDetails`: Allows users to populate the data fields for a customer.

Best practices for modifying objects

To make sure you always have the default interfaces, expression rules, and process models to refer back to, we suggest the following:

- Create copies of the interfaces, expression rules, and process models you want to update.
- Name them with the suffix of _CUSTOM. For example, something different than `AS_SRQ_FM_servicingSummary_CUSTOM`.
- Use your new objects instead of the original objects.

> Do not create copies of the CDTs. This would require you to update every reference to the CDT in the application. Instead, just modify the default CDTs provided in the application.

Modifying UI Text

Introduction

Because of the Connected Servicing application's ability to be translated into multiple languages, certain UI text for Connected Servicing's interfaces are contained in bundle files. For example, labels, validation messages, tooltips, and instructional text. To update this UI text, you update the bundle file that is associated with it.

Note that some dropdown list values are contained in reference data tables. To modify this type of UI text, see Modifying Dropdown Lists. Keep in mind that user-entered text always displays in whatever language the user entered.

This page describes how to modify the bundle files for Connected Servicing to update UI text, as well as how to use the bundle files to internationalize the UI text.

Internationalizing UI text

Out of the box, Connected Servicing is shipped in English. However, if your organization has users in many countries, there may be a need to use the Connected Servicing application in other languages. An admin can configure the available default languages for the platform from the Admin Console and instruct users on how to personalize their language settings.

Defining default languages from the Admin Console will convert many of the Appian out-of-the-box utilities. However, UI text in the Connected Servicing application needs configuration in order to display in other languages.

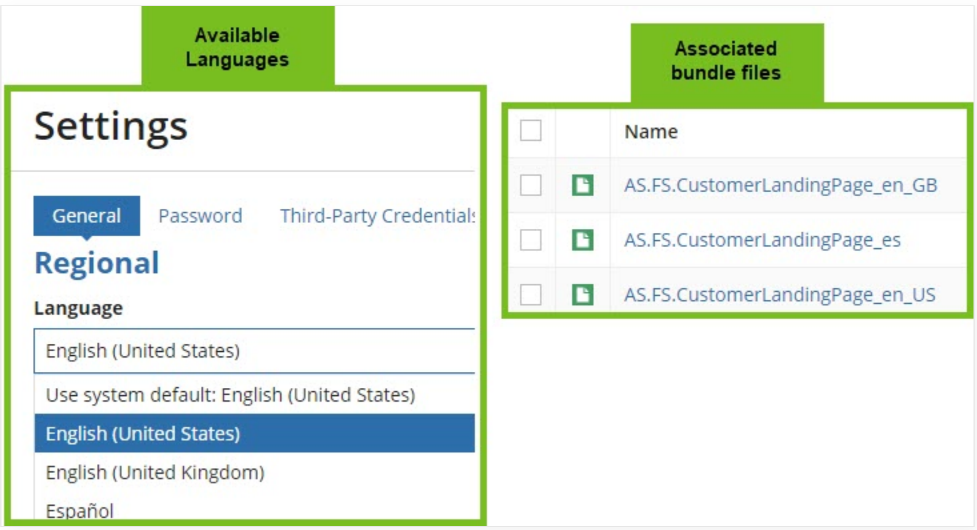
The following information applies to internationalized UI text as well as the default English UI text. See Adding a new language for instructions on how to internationalize your application.

To internationalize dropdown values, refer to Modifying Dropdown Lists.

Using bundle files for UI text

In order to display UI text, the Connected Servicing application loads the correct language bundle (or document file) based on the default language that the user has selected.

It's important that each default language available for users to select has a corresponding set of bundle files. For example, if users can select *English (United States)* or *Español* from settings, there must be corresponding bundle files for each of these languages.



Using bundle files in an interface

For interfaces that are in the **AS SRQ Full Application** application, to load the UI text onto the interface you need to load the entire bundle onto the form. You do this by using a local variable with the `rule!AS_SRQ_UT_loadI18nBundles` expression rule. The only parameter you need to pass in is called `triggerRefresh`. Under most circumstances `triggerRefresh` can be passed as null. `triggerRefresh` is only needed in cases where internationalization data needs to be reloaded after the user completes an action. For example, after a user adds new dropdown values from the front end. In this case, `triggerRefresh` should be a variable that is updated on completion of that action.

Example

```
a!localVariables(
  local!i18nData: rule!AS_SRQ_UT_loadI18nBundles(
    triggerRefresh: null
  )
)
```

The `rule!AS_SRQ_UT_loadI18nBundles` expression rule will automatically take into account the user's language and load the correct UI text. It's recommended that you call this rule in the main form and pass the UI text data to the sub-interfaces as a rule input. Name the rule input `i18nData` and make the **Type** `anyType`.

To display UI text on an interface, for the parameter that specifies the text to display, such as the *label* parameter, use the `rule!AS_CO_I18N_UT_displayLabel` expression rule. In the following example, the UI will display `Active Owners`, which is the value of the `lbl_ActiveOwners` label key in the `AS.SRQ.RequestOwners_en_US` bundle file.

The value of the *bundleKey* parameter is created using:

- The name of the bundle file, without the language suffix (en_us). For example: `AS.SRQ.RequestOwners`.
- The label key for the value that you want to display. For example: `lbl_ActiveOwners`.

The *bundleKey* parameter in this example would look like: `AS.SRQ.RequestOwners.lbl_ActiveOwners`.

Example

```
```

```
...
local!i18nData:rule!AS_SRQ_UT_loadI18nBundles(triggerRefresh: null),
  a!formLayout(
    label: rule!AS_CO_I18N_UT_displayLabel(
      i18nData: local!i18nData,
      bundleKey: "AS.SRQ.RequestOwners.lbl_ActiveOwners"
    )
  )
...
```

AS.SRQ.RequestOwners_en_US bundle file excerpt

```
...

lbl_ActiveOwners=Active Owners
lbl_AddOwner=Add Owner
lbl_DesignatePrimaryOwner=Designate as primary owner
lbl_InactiveOwners=Inactive Owners

...
```

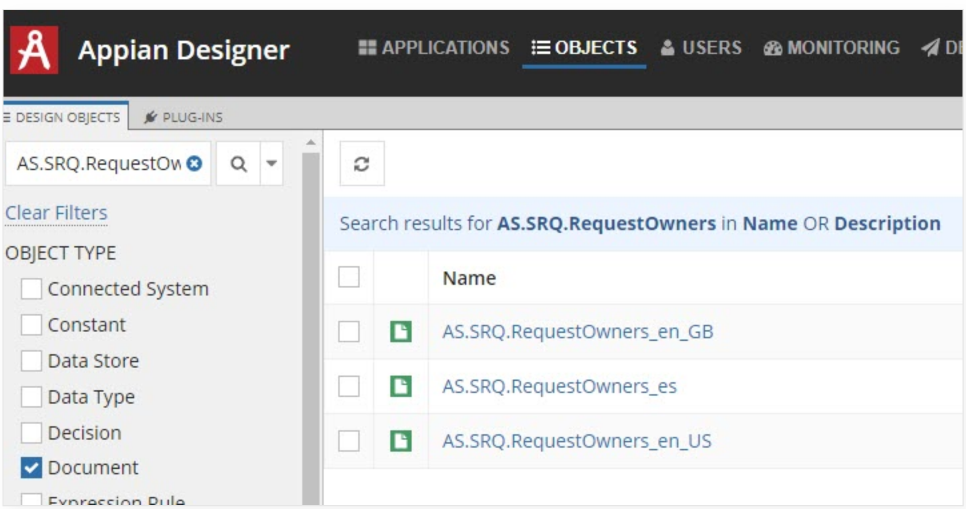
Updating existing UI text

To change existing UI text, update the bundle file associated with it.

1. In an interface where the UI text is used, find the UI text in the expression.
2. Get the values of the *bundleKey* parameters.

```
rule!AS_CO_I18N_UT_displayLabel(
  i18nData: ri!i18nData,
  bundleKey: "AS.SRQ.RequestOwners.lbl_DesignatePrimaryOwner"
)
```

3. In Appian Designer, search for the bundle file name, which is the first part of the *bundleKey* parameter. For example, `AS.SRQ.RequestOwners`.
4. Select the document with the extension of the language you need to update. For example, for English, select `AS.SRQ.RequestOwners_en_US`.

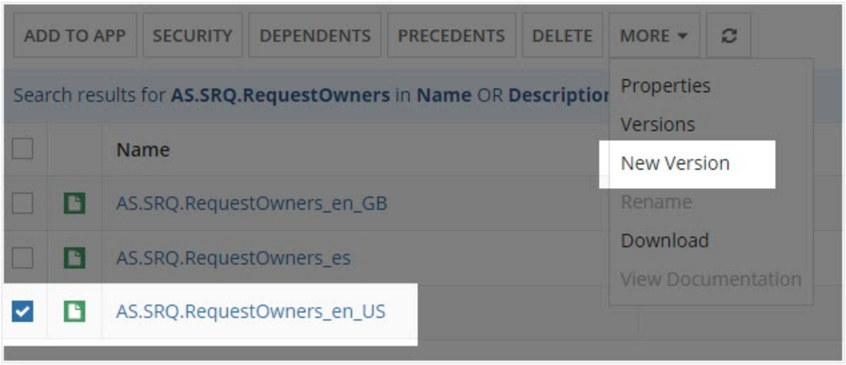


5. Download the document and open it in a text editor.
6. In the bundle file, find the label key, which is the second part of the *bundleKey* parameter. For example, lbl_DesignatePrimaryOwner.
7. Update the value associated with the label key, then save the file.

```
...

   lbl_ActiveOwners=Active Owners
   lbl_AddOwner=Add Owner
   !lbl_DesignatePrimaryOwner=Designate as primary owner
   lbl_InactiveOwners=Inactive Owners
   lbl_NoActiveOwners=No active owners
...
```

8. In Appian Designer, select the box next to the bundle file name, then select **MORE** > **New Version**.



9. Upload the updated bundle document file.

Creating a new bundle file for an existing language

If you create a new interface and feel that there isn't a bundle file that would accurately represent what is on the interface, you may need to create a new bundle file.

When creating new bundle files, make sure they are small and targeted to make change management easier. If you change the UI text somewhere, you want to know everywhere it is being updated to make sure it isn't updated in any unintended places.

To create a new bundle file:

1. Create a new document with file extension `.properties`.
2. Name the file something that is associated with your interface and end the name of the document with an underscore and the language code. Use language codes provided by the Appian Admin Console. For example, *NewData_en_US*.
3. In the PROPERTIES file, list the new label keys and their values. Follow the paradigm `LABEL_KEY=VALUE`.
   - For the label key, use underscores instead of spaces.
   - Don't put spaces around the equals sign.
   - Capitalize the UI text exactly as you want it to appear in the application.

Naming conventions for prefixes should be based on the label's use.

- Start with a three letter code that describes what the text is used for, followed by an underscore. For example, if the text is for a validation message, use `vld_`. If it is for a button, use `btn_`.
- End with a short description of the text using Pascal case. For example, for a message that says "Please correct the following errors," you could use `vld_PleaseCorrectFollowing`.

Creating dynamic labels

Sometimes there is UI text that needs information from the interface or user, such as validations or specific user messages. In order to do this, the loadbundle function also takes in an *arguments* parameter.

The syntax of arguments that will change is defined as `[% argument#]`. When you call this in the rule, you can pass the dynamic information into the argument parameter.

Example: Today is [date]

To display `Today is [date]`, the bundle file label key and value could be:

```
lbl_TodayIs=Today is [%1].
```

When you call the rule in the application, for the *arguments* parameter, you would enter the function `{today()}`.

```
label: rule!AS_CO_I18N_UT_displayLabel(
   i18nData: ri!i18nData,
   bundleKey: "bundleName.lbl_TodayIs",
   arguments: {today()}
)
```

Example: Today is [date] and Tomorrow is [date + 1]

If there are multiple arguments, `argument#` is incremented by 1.

For example, to display `Today is [date] and Tomorrow is [date + 1]`, the bundle file label key and value could be:

```
lbl_TodayIsAndTomorrowIs=Today is [%1] and Tomorrow is [%2]
```

When you call the rule in the application, for the *arguments* parameter, you would enter the array `{today(), today()+1}`.

```


```

```
label: rule!AS_CO_I18N_UT_displayLabel(
  i18nData: ri!i18nData,
  bundleKey: "bundleName.lbl_TodayIsAndTomorrowIs",
  arguments: {today(), today()+1}
)
```

Using rich text formatting for values

To apply rich text formatting to any arguments passed to dynamic internationalized text, including link functionality, use `rule!AS_CO_I18N_UT_displayLabel_RichText`

```
label: rule!AS_CO_I18N_UT_displayLabel_RichText(
  i18nData: ri!i18nData,
  bundleKey: "bundleName.lbl_TodayIsAndTomorrowIs",
  richTextArguments: {
    a!richTextItem(
      text: today(),
      style: "STRONG",
      color: "POSITIVE"
    ),
    a!richTextItem(
      text: today() + 1,
      style: "STRONG",
      color: "NEGATIVE"
    )
  }
)
```

Adding a new language

To internationalize the application for your organization, you can add new languages.

To add a new language:

1. Download all of the bundle files from the internationalization folders.
2. Rename the files using the language code for the language you are translating. Use language codes provided by the Appian Admin Console. For example, *NewData_en_US* would become *NewData_es*.
3. The PROPERTIES file lists label keys and their values, following the paradigm `LABEL_KEY=VALUE`. Replace all of the values with the equivalent text in the new language. Do not modify the label keys.
    - Don't put spaces around the equals sign.
    - Capitalize the text exactly as you want it to appear in the application.
    - Make sure that in any values that contain arguments, you do not modify the arguments. For example, translating `lbl_TodayIs=Today is [%1].` into spanish would be `lbl_TodayIs=Hoy es [%1].`.
4. Enable the new language in the Admin Console.
5. Enable internationalization for dropdown list values

After these steps are complete when a user selects that language, the UI text including dropdown list values will display in the correct language.

Modifying Validations

Introduction

Appian Connected Servicing includes field validations in order to prevent users from entering bad data during the service request process.

This has several important benefits:

- It can ensure the Write to Data Store nodes in the process models do not break due to length restrictions of the database.
- It keeps data properly structured.
- It enforces data requirements.

This document describes the underlying validation structure for the Create Service Request form. It also explains how to add to and edit the default validations.

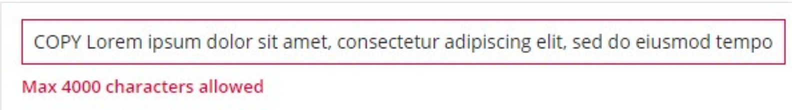
Default validations

The types of default validations that are set up for the Create Service Request form are:

- Maximum length
- Required fields
- Invalid type
- Invalid data

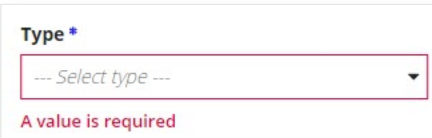
Maximum length validations

For every field that allows free text entry, there is a maximum length validation. If the user enters data that exceeds the maximum length allowed by the field, it will be outlined in red and the user sees a message that states the maximum amount of characters.



Required field validations

By default, there are several required fields that must be filled out before submitting the form. These fields are denoted with an asterisk (*).



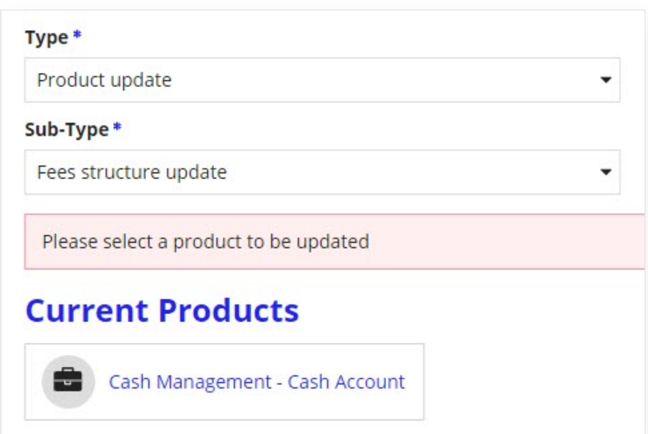
Out of the box, the following fields are always required while creating a service request:

- Customer
- Type
- Sub-type
- Target completion date
- Owner

The following fields are only required if the parent field is added:

- Required Document
  - Type
  - If a New or Existing is selected, a document must be uploaded

Depending on the type and subtype of the request, the user might also need to select the specific piece of data the service request applies to. For example, if a user selects a type of **Product update** and subtype of **Fee structure update**, the user must then select which product the fee structure change applies to.



Invalid type validations

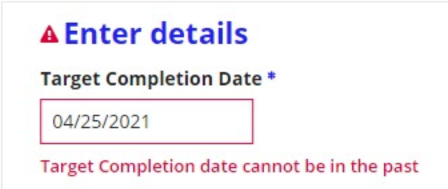
Connected Servicing uses the standard Appian restrictions on fields to validate invalid data types. The user sees a message on fields where an improper type has been entered.

For example, if the field is an integer data type, entering text will cause a validation error.

Invalid data validations

If there are specific validation rules that apply to certain fields, users will see a message beneath that field instructing them on the proper data.

For example, a target completion date for a service request cannot be in the past; therefore, if a user enters a date in the past the field will show a validation and the user cannot go to the next page of the form.



These validations can be configured at the field level by creating rules for the `validation` parameter of the fields.

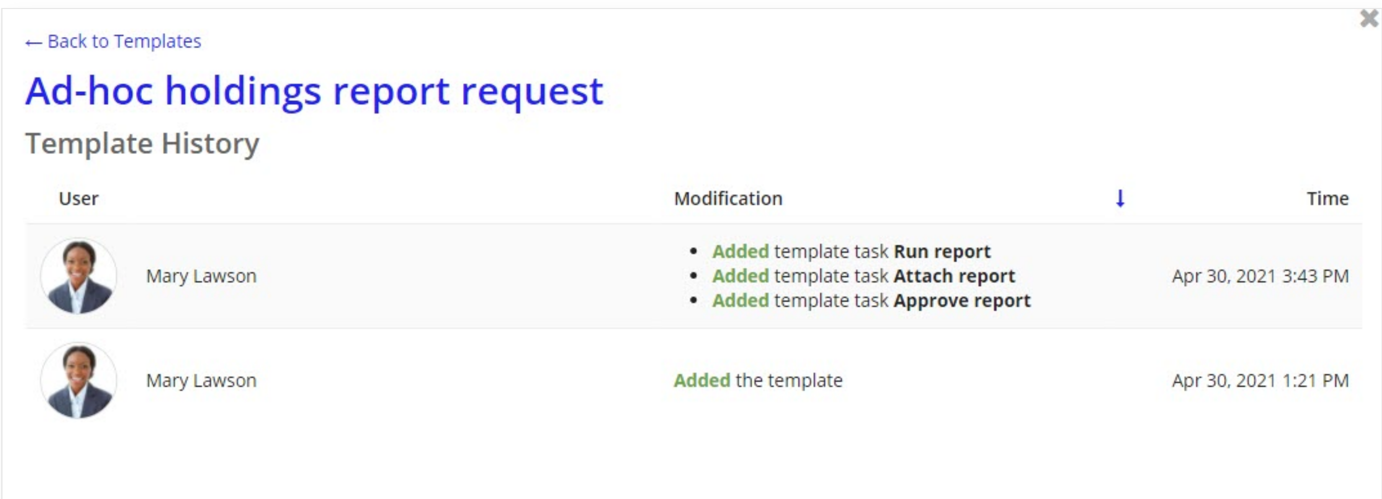
Configure Auditing

Introduction

The Connected Servicing solution includes an auditing process that allows you to audit Process Templates and specific field changes in a service request. Your business users can use this auditing process to track certain histories that may inform their decisions later on, including adding or removing a step in a process, modifying a template, or changing data.

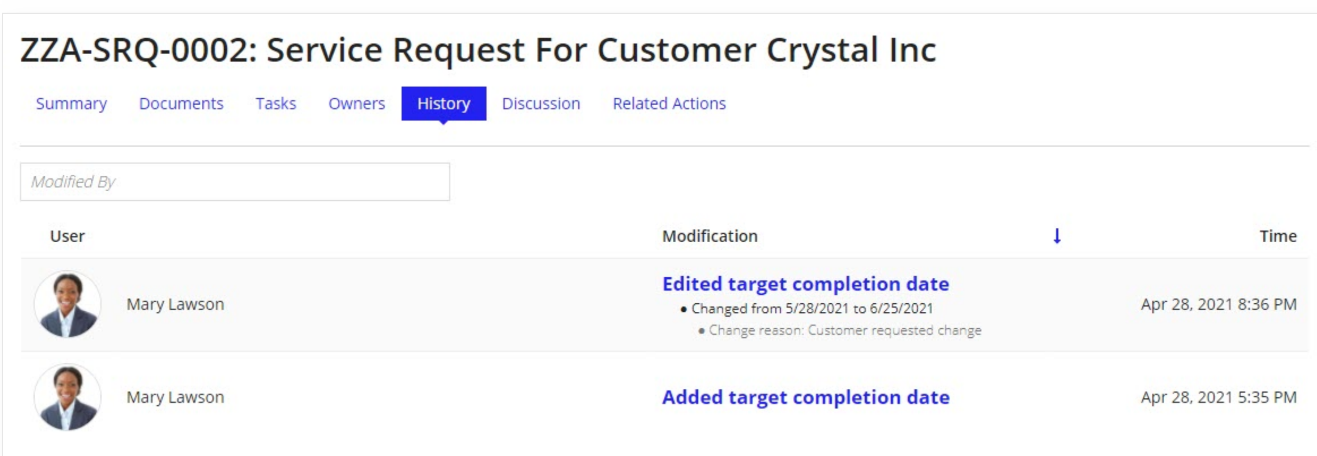
Currently, the following changes are tracked and are visible on either the Connected FS Settings Site or main Connected Servicing Site:

- Templates, template tasks and properties, and task precedents
  - You can view this by clicking the history icon on the **Templates** page of the Connected FS Settings Site.



To view the changes to service request details:

1. From the **Connected Servicing** site, select the **Servicing Requests** tab.
2. Click on the name of the service request.
3. Go to the **History** tab.



If a new field is added to an audited CDT, you will need to configure auditing for that field in order to start tracking it.

We currently track audits to the following CDTs:

- `AS_TMG_R_TaskCategory`
- `AS_TMG_R_TaskRef`
- `AS_TMG_R_Template`
- `AS_TMG_R_TemplateTask`
  - Nested array in `AS_TMG_R_Template`
- `AS_TMG_R_TemplateTask_Precedent`
  - Nested array in `AS_TMG_R_TemplateTask`
- `AS_SRQ_ServiceRequest`

CDT Name	Expression Rule Name	Parameter to update
`AS_TMG_R_TaskCategory`	`AS_TMG_ADT_BL_auditConfig_R_TaskCategory`	*simpleFields*
`AS_TMG_R_TaskRef`	`AS_TMG_ADT_BL_auditConfig_R_TaskRef`	*simpleFields*
`AS_TMG_R_Template`	`AS_TMG_ADT_BL_auditConfig_R_Template`	top-level *simpleFields*
`AS_TMG_R_TemplateTask`	`AS_TMG_ADT_BL_auditConfig_R_Template`	*simpleFields* in the `fieldName` parameter where "templateTasks" is the value.
`AS_TMG_R_TemplateTask_Precedent`	`AS_TMG_ADT_BL_auditConfig_R_Template`	*simpleFields* in the "templateTaskPrecedents" structure
`AS_SRQ_ServiceRequest`	`AS_SRQ_ADT_BL_auditConfig_ServicingRequest`	*simpleFields*

If you modify one of the CDTs or one of the associated child CDTs listed in the table, reexamine the configuration rule for the modified CDT to determine if it requires updating.

Auditing configuration for each CDT are stored in following rules:

- `AS_TMG_ADT_BL_auditConfig_< CDT Name >`
- `AS_TMG_ADT_BL_auditConfig_R_TaskCategory`
- `AS_TMG_ADT_BL_auditConfig_R_TaskRef`
- `AS_TMG_ADT_BL_auditConfig_R_Template`
- `AS_SRQ_ADT_BL_auditConfig_ServicingRequest`

Setting up an audit

To audit a field in a CDT:

1. Open the CDT and choose the field you want to audit.
2. Find the expression rule associated with that CDT.
   - See table above for list of expression rules and their associated CDTs.
3. If you are auditing a parent CDT, update the top-level `simpleFields` parameter.
4. If you are auditing a nested CDT, update the `simpleFields` parameter within that nested value.

EXAMPLE: Adding and auditing a new field

You may add **Customer Type** as a new parameter to your service request templates and want to monitor any changes made.

To add and audit the **Customer Type** field to a template:

1. Open the `AS_TMG_ADT_BL_auditConfig_R_Template` expression rule.
2. Add the new `customerTypeCode` field to the `AS_TMG_R_Template` CDT.
   - See the table above for associated expression rules and CDTs.
3. Add the new `customerTypeCode` field to the `simpleFields` array.
4. Save your changes.

```
/*
Audit config for
'type!{urn:com:appian:types:AS:TMG}AS_TMG_R_Template'
*/
{
  idField: "templateId",
  simpleFields: {
      /*"templateId", excluded since it is the primary key*/
      "templateName",
      "templateDesc",
      "dueDateCalculationUnit",
      !"customerTypeCode",
      rule!AS_TMG_UT_determineTemplateMappingFields(recordTypeCode: ri!recordTypeCode)
      /*"templateTasks", excluded since it is tracked in complexFields*/
      /*"createdBy", no need to track changes to this*/
      /*"createdDatetime", no need to track changes to this*/
      /*"modifiedBy", no need to track changes to this*/
      /*"modifiedDatetime" no need to track changes to this*/
    },
...
```

EXAMPLE: Adding and auditing a new field in a nested array

Adding and auditing a new field in a nested array can be a complex set of steps. For example, if you want to add and track SLA Days in the `AS_TMB_R_TemplateTask` CDT, which is nested in the `AS_TMG_R_Template` CDT, you will need to do the following:

1. Open the associated `AS_TMG_ADT_BL_auditConfig_R_Template` expression rule.
2. Locate the *fieldName* templateTasks inside the *complexFields* array.
3. Add the "slaDays" field to the array.
4. Save your changes.

```
/*
Audit config for
'type!{urn:com:appian:types:AS:TMG}AS_TMG_R_Template'
*/
{
  idField: "templateId",
  simpleFields: {
    /*"templateId", excluded since it is the primary key*/
      "templateName",
      "templateDesc",
      "dueDateCalculationUnit",
      rule!AS_TMG_UT_determineTemplateMappingFields(recordTypeCode: ri!recordTypeCode)
      /*"templateTasks", excluded since it is tracked in complexFields*/
      /*"createdBy", no need to track changes to this*/
      /*"createdDatetime", no need to track changes to this*/
      /*"modifiedBy", no need to track changes to this*/
      /*"modifiedDatetime" no need to track changes to this*/

  },
  complexFields: {
    {
      fieldName: "templateTasks",
      auditFieldName: "templateTasksChanges",
      idField: "templateTaskId",
      simpleFields: {
        /*"templateTaskId", excluded since it is the primary key*/
        /*"templateId", excluded since it is the foreign key to the parent*/
        "taskRef.taskRefId",
        "groupAssignee",
        "taskDesc",
        /*"templateTaskPrecedents", excluded since it is tracked in complexFields*/
        "slaDays"
      },
...
```

Migrating Data

Introduction

After installing Connected Servicing, you may need to migrate data from your organization's systems. This process is generally very unique and has its own nuances that depend on many factors.

This page provides general guidelines to help you migrate data from customers, documents, accounts, and products.

Migrating customer data

To migrate data from customers:

1. Import the data into the `AS_FS_CUSTOMER` table.
2. Create a document folder for each customer. In the `FOLDER_ID` column of the `AS_FS_CUSTOMER` table, store the ID of this document folder.

The remaining fields should be self-explanatory.

Migrating documents

To migrate documents:

1. Create an Appian document for each document you are migrating.
2. Store this document in the document folder for the customer that the document is associated with.
3. Import the document metadata into the `AS_FS_CUSTOMER_DOCUMENT` table.
4. In the `FOLDER_ID` column of the`AS_FS_CUSTOMER_DOCUMENT` table, store the ID of the customer's document folder.

The remaining fields should be self-explanatory.

Migrating product data

Only migrate data into the product table if products are parents to accounts.

The `AS_FS_Product` CDT is a parent to the following children CDTs:

- AS_FS_Account
- AS_FS_Term
- AS_FS_Country
- AS_FS_Fee
- AS_FS_PayThreshold

When you migrate product data, you will also need to update the tables related to these CDTs.

To migrate product data:

1. Import the data into the `AS_FS_PRODUCT` table.
2. Import the related data into the following tables:
   - `AS_FS_ACCOUNT`
   - `AS_FS_TERM`
   - `AS_FS_COUNTRY`
   - `AS_FS_FEE`
   - `AS_FS_PAY_THRESHOLD`

Modifying Service Request Template Selection Logic

Introduction

When a new service request is created, Connected Servicing knows which default tasks need to be assigned automatically. In order to do this, it needs two things: the service process template, and the attributes entered during service request creation that are used to select the template.

Out of the box, Connected Servicing uses the **Type** and **Subtype** to determine which service request process template to select. For example, if a user selects *Product update* for the type, and *Fee structure update* for the subtype, Connected Service will generate a different set of tasks than if the user selects *Customer information update* and *Beneficial owners update*.

This page describes how to add or remove the attributes used to select the service request process templates. For instructions on how to modify service process templates, including how to create templates for these attributes, see Managing templates on the Setting Up Service Request Processes page.

Adding a selection attribute

If your organization wants to use an attribute other than type and sub-type, you will need to add a new attribute.

Adding a new selection attribute consists of:

- Updating objects to store the new attribute for template selection.
- Enabling users to choose the value of the attribute when setting up a service request process template.
- Enabling the application to use the new attribute to select the correct template when a new service request is created.
- Enabling the application to properly audit any changes made to the templates with this new attribute.

Throughout the next steps, we will walk through an example to add the service request owner as a new attribute.

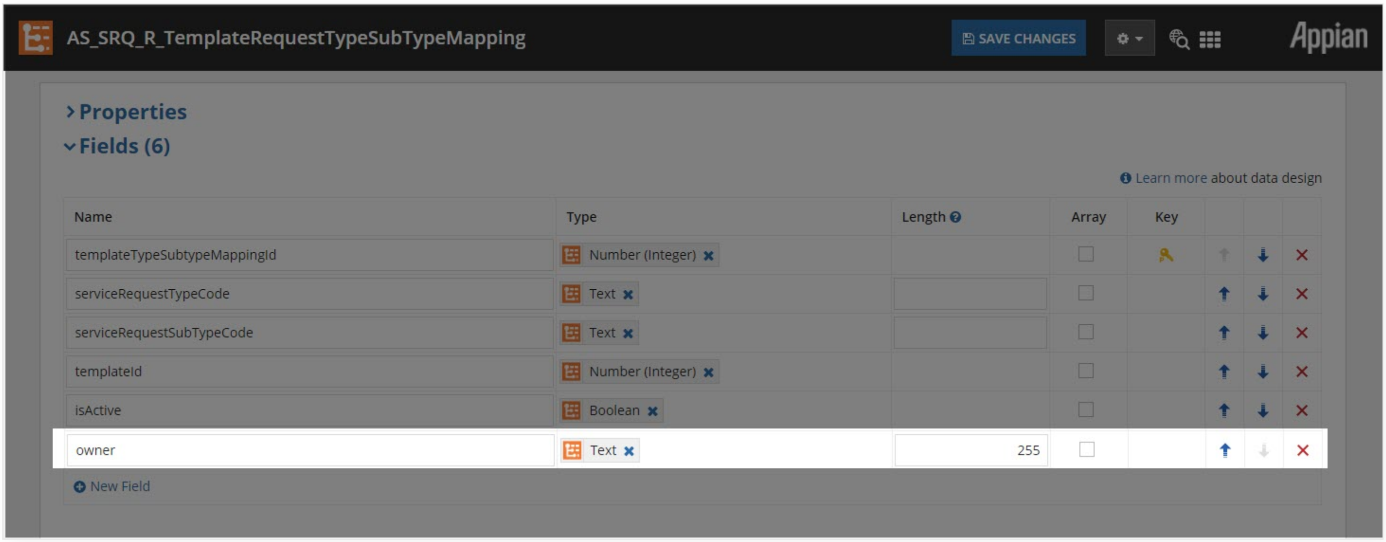
Step 1: Add field to the template reference CDT

In order to be able to save the value of the new attribute, you will need to add it to the CDT for the service request process template.

1. Add the attribute as a field to the `AS_SRQ_R_TemplateRequestTypeSubTypeMapping` CDT.
2. Verify the data store.
   - Open the `AS SRQ Ref Data Store` data store.
   - Click **Verify**.
   - Click **Save & Publish**.

EXAMPLE

The following screenshot shows the `owner` field added to the `AS_SRQ_R_TemplateRequestTypeSubTypeMapping` CDT.



Step 2: Add the field to template audit configuration rule

The template audit configuration rule is used to track changes to a template when attributes are changed. For example, if a user changes a template mapped to one owner to be mapped to another owner, this will be captured in the audit history.

After you add a field to the `AS_SRQ_R_TemplateRequestTypeSubTypeMapping` CDT, you will need to update the audit configuration rule for the CDT.

1. Open the `AS_SRQ_ENTRYPOINT_GETDATA_getTemplateMappingFields` expression rule.
2. Add the new field name to the list of fields.

Step 3: Add the attribute to the template properties interface

Users will select the value of the new attribute when they are setting up the service request process template. You will need to add the attribute to this interface so that they will be able to select it. Additionally, you will need to save their selection to the database and pass the selection into related interfaces.

1. Open the `AS_SRQ_ENTRYPOINT_DISPLAY_mappingFieldsForRTemplate` expression rule.
2. Add a new mapping component input to allow the user to choose a value for the new attribute and save their selection. Copy the design used for the existing attributes.

```
...
mappingComponentThree: a!localVariables(
  rule!AS_CO_CP_pickerFieldUsers(
  label: rule!AS_CO_I18N_UT_displayLabel(
    i18nData: local!i18nData,
    bundleKey: "AS.SRQ.RequestOwners.lbl_Owner"
  ),
  required: true,
  maxSelections: 1,
  groupFilter: <YOUR GROUP OF OWNERS>,
  value: ri!mappingCdt.owner,
  saveInto: ri!newOwner.owner,
  placeholder: rule!AS_CO_I18N_UT_displayLabel(
    i18nData: local!i18nData,
    bundleKey: "AS.SRQ.RequestOwners.plc_SearchUsers"
    )
  )
)
...
```

3. Open `AS_TMG_CPS_manageReferenceTemplateProperties` expression rule.
4. Show the mapping next to or below the other mapping properties.

```
...

a!localVariables(
          local!mappingFields: a!refreshVariable(
            value: rule!AS_TMG_UT_determineMappingFieldsForTemplate(
              mappingCdt: ri!mappingCdt,
              recordTypeCode: ri!selectedTemplate.recordTypeCode
            ),
            refreshAlways: true
          ),
          {
            a!columnLayout(
              contents: { local!mappingFields.mappingComponentOne },
              width: "AUTO"
            ),
            a!columnLayout(
              contents: { local!mappingFields.mappingComponentTwo },
              width: "MEDIUM"
            ),
               a!columnLayout(
                 contents: { local!mappingFields.mappingComponentThree },
                 width: "MEDIUM"
               )
          }
        )
...
```

Step 4: Update the queries that retrieve the templates

The `AS_SRQ_QE_getTemplateTypeSubtypeMapping` expression rule is a query that retrieves the appropriate template based on the attributes that are passed into it. In order for the correct template to be selected during service request, you will need to add the new attribute to this expression rule so that it will be included in the query parameters.

1. Open the `AS_SRQ_QE_getTemplateTypeSubtypeMapping` expression rule.
2. Add a rule input with the same name as the new field that you added to the CDT.
3. Add a query filter where the new field equals the new rule input.
    - **Note**: In the following `a!queryFilter()` example, you would replace *<newField>* with the name of the field that you added to the CDT.

```
a!queryFilter(
  field: "<newField>",
  operator: "=",
  value: ri!<newField>
)
```

4. In the following expression rules, if the rule input is not in the `serviceRequest` CDT pass down the rule input that you just added to the `AS_SRQ_QE_getTemplateTypeSubtypeMapping` expression rule in order to use this new field for default template selection.
    - `AS_SRQ_QE_getTemplateForServiceRequest` expression rule

EXAMPLE

The following is an example of adding the new query filter to the `AS_SRQ_QE_getTemplateTypeSubtypeMapping` expression rule.

```
...
      a!queryLogicalExpression(
        ignoreFiltersWithEmptyValues: true,
        operator: "AND",
        filters: {
          a!queryFilter(
            field: "templateId",
            operator: "in",
            value: ri!templateId
          ),
          a!queryFilter(
            field: "templateName",
            operator: "=",
            value: ri!templateName
          ),
          a!queryFilter(
            field: "serviceRequestTypeCode",
            operator: "in",
            value: ri!serviceRequestTypeCode
          ),
          a!queryFilter(
            field: "serviceRequestSubTypeCode",
            operator: "in",
            value: ri!serviceRequestSubTypeCode
          ),
          a!queryFilter(
            field: "owner",
            operator: "=",
            value: ri!owner
          )
        }
      ),
...
```

Step 5: Update the template validations

The `AS_SRQ_UT_isDuplicateTemplateByMappingFields` expression rule validates that there are no overlapping templates and that there are no blank template attributes. This ensures that there is not more than one template with the same combination of attributes. For example, there cannot be two templates Type: *Product update* and Subtype: *Fee structure update*.

You will need to add the new attribute to this rule to ensure that it is included in this validation.

1. Open the `AS_SRQ_UT_isDuplicateTemplateByMappingFields` expression rule.
2. In the `or()` function, add a condition to check if the new field is blank. See the example below for how to add this.
3. In the `rule!AS_SRQ_QE_getTemplateTypeSubtypeMapping()` part of the expression, add the parameter for the new attribute. See the example below for how to add this.

EXAMPLE

In the example below, we added a check to see if the owner is blank. We also added the customer type code to the template query.

```
if(
  or(
    rule!AS_CO_UT_isBlank(
      ri!requestTypeSubTypeMapping.serviceRequestSubTypeCode
    ),
    rule!AS_CO_UT_isBlank(
      ri!requestTypeSubTypeMapping.serviceRequestTypeCode
    ),
    rule!AS_CO_UT_isBlank(
      ri!requestTypeSubTypeMapping.owner
    )
  ),
  "",
  a!localVariables(
    local!isDuplicate: rule!AS_SRQ_QE_getTemplateTypeSubtypeMapping(
      serviceRequestTypeCode: ri!requestTypeSubTypeMapping.serviceRequestTypeCode,
      serviceRequestSubTypeCode: ri!requestTypeSubTypeMapping.serviceRequestSubTypeCode,
      owner: ri!requestTypeSubTypeMapping.owner,
      returnType: cons!AS_CO_ENUM_QE_RETURN_TYPE_TOTAL_COUNT,
      isActive: true,
      templateIdsToExclude: ri!requestTypeSubTypeMapping.templateId
    ) > 0,
    if(
      local!isDuplicate,
      rule!AS_SRQ_UT_loadBundleAndDisplayLabel(
        bundleKey: "AS.SRQ.General.vld_DuplicateTemplateMappingWithSameTypeAndSubType"
      ),
      null
    )
  )
)
```

When business users set up the service request process template, they will be required to select a value for the new attribute. Additionally, when users are creating a new service request and they select a value for the new attribute, that value will be used to determine which service request process template to use for the tasks.

Removing a selection attribute

If your organization doesn't want to use type or subtype to select the service request process template, you can remove attributes.

Note that there is no need to remove the actual field from the CDT. Leaving an unused field on the CDT will not affect anything.

Step 1: Remove the attribute from the template properties interface

Business users select attributes when they are setting up the service request process template. You will need to remove the attribute from this interface. Additionally, you will need to update the related interfaces where this information is being passed to.

1. Open the `AS_SRQ_ENTRYPOINT_DISPLAY_mappingFieldsForRTemplate` interface.
2. Remove the user picker component that allows users to choose a value for the old attribute.
3. In the following dependent interfaces, remove the corresponding mapping components:
    - `AS_TMG_UT_determineMappingFieldsForTemplate`interface
    - `AS_TMG_CPS_manageReferenceTemplateProperties`interface

Step 2: Update the queries that retrieve the templates

The `AS_SRQ_QE_getTemplateTypeSubtypeMapping` expression rule is a query that retrieves the appropriate template based on the attributes that are passed into it. You will need to add the new attribute to this expression rule so that it will be included in the query parameters.

1. Open the `AS_SRQ_QE_getTemplateTypeSubtypeMapping` expression rule.
2. Remove the rule input for the attribute being removed.
3. Remove the query filter for the attribute being removed.
4. In the following expression rules, remove the references to the rule input for the attribute that is being removed.
    - `AS_SRQ_QE_getTemplateForServiceRequest` expression rule

Step 3: Update the template validations

The `AS_SRQ_UT_isDuplicateTemplateByMappingFields` expression rule validates that there are no overlapping templates and that there are no blank template attributes.

You will need to remove the attribute from this rule so that it is no longer included in this validation.

1. Open the `AS_SRQ_UT_isDuplicateTemplateByMappingFields` expression rule.
2. In the `or()` function, remove the condition to check if the field you are removing is blank.
3. In the `rule!AS_SRQ_QE_getTemplateTypeSubtypeMapping()` part of the expression, remove the parameter for the attribute you are removing.

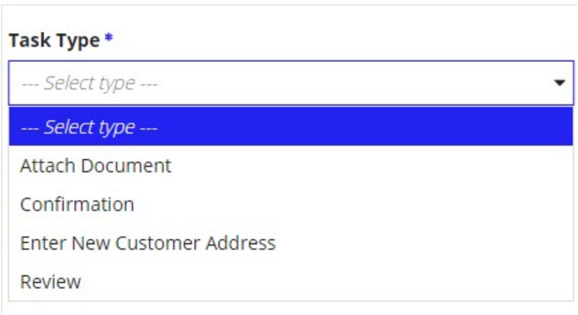
When users set up the service request process template, the attribute you just removed will no longer be an option for determining template selection. Additionally, when users create a new service request, the value you just deleted will not be used to determine which service request process template to use for the tasks.

Add a New Task Type

Introduction

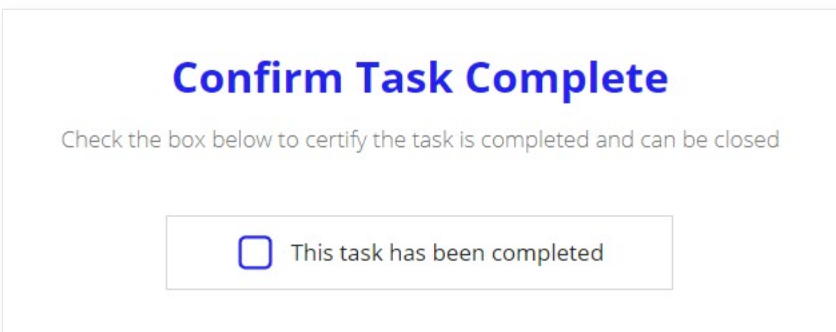
Tasks allow Connected Servicing users to keep track of the work they need to accomplish for each service request. Based on the process template applied to a service request, the solution automatically assigns the associated tasks to the correct user group.

When you add a custom task from a service request record, you can choose from three different task types: Attach Document, Review, Confirmation, and Enter New Customer Address.

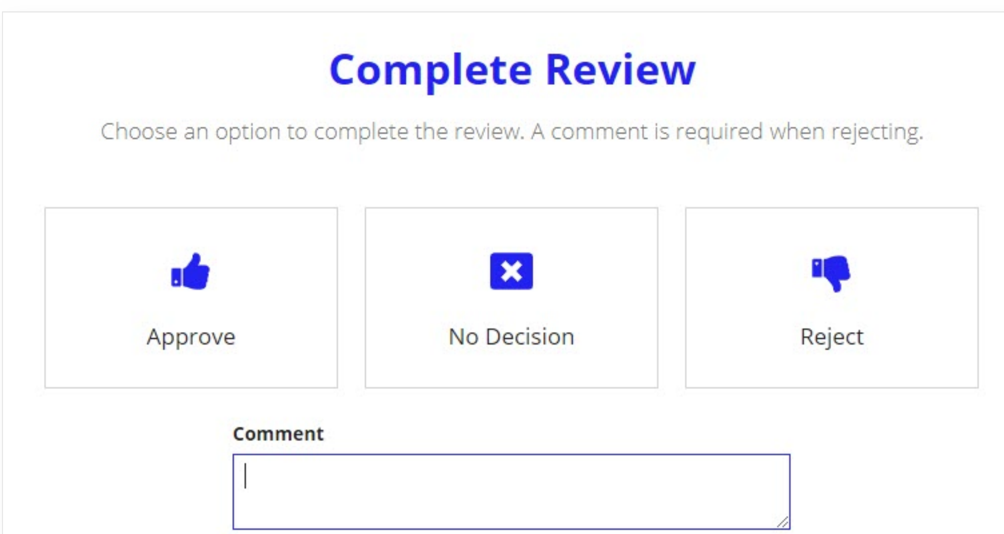


To complete them, each task type has its own unique interface and associated process model.

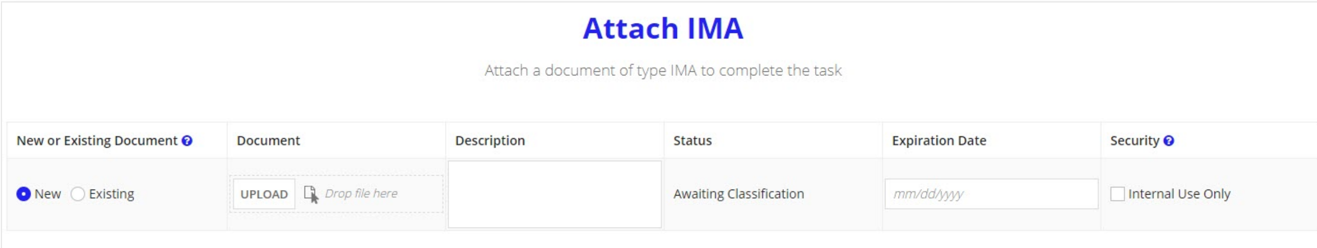
1. Confirmation task.



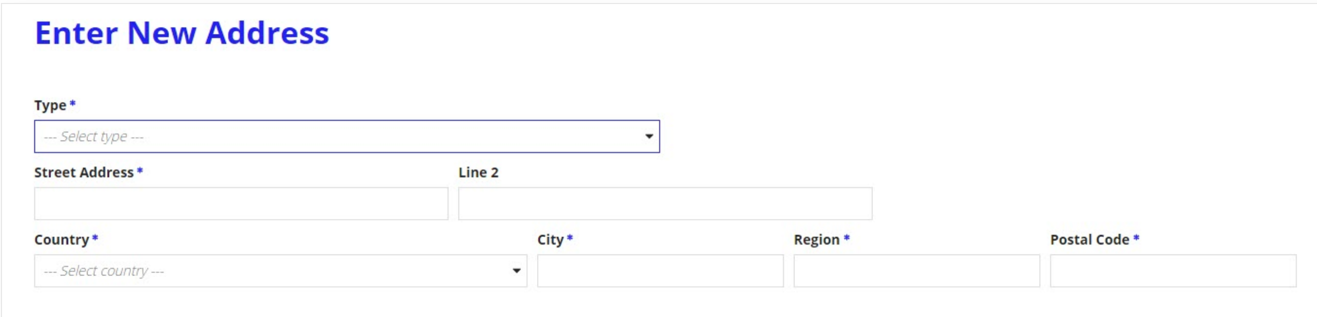
2. Review task.



3. Attach document task.



4. Enter new customer address.



You can create automated tasks that are kicked off and completed by the system. For example, you can create an automated task to send an email or kick off an RPA process.

This page walks you through the basics of how to add a new task type.

Add the new task type to the task type reference table

The task types are stored in the `AS_TMG_R_TASK_BEHAVIOR_TYPE` table. In order to add a new task type, you first need to add it to this table.

To add a new task type to the table:

1. Insert a new row into the `AS_TMG_R_TASK_BEHAVIOR_TYPE` table.
2. Update each column with the following information.
   - BEHAVIOR_TYPE_CODE: The behavior type of the task. Valid values:
     - `AUTOMATED` The task is not user-facing, it does not have a front-end interface. It is automatically completed by the system via a process model.
     - `DATA_ENTRY` The task has a related user interface that allows data entry. For example, the Document Upload task allows users to upload a document and enter document details for a new document.
     - `CHECKBOX` The tasks can be completed by selecting a checkbox. For example, a Confirmation task will require the user to affirm that the task is completed before submission.
       - **Note:** You probably won't have to create another task type with `CHECKBOX` for the BEHAVIOR_TYPE_CODE.
   - BEHAVIOR_DISPLAY_NAME - A unique name for the new task type that displays to end users. Each BEHAVIOR_SUBTYPE_CODE should have a unique display name.
   - CREATED_BY: Your Appian username.
   - CREATED_DATETIME: The current timestamp for a created task in YYYY-MM-DD HH:MM:SS format.
   - MODIFIED_BY: Your Appian username.
   - MODIFIED_DATETIME: The current timestamp for a modified task in the format YYYY-MM-DD HH:MM:SS.
   - BEHAVIOR_SUBTYPE_CODE - A unique code for the new task type.
   - CONFIGURATION_LEVEL_CODE - Determines how tasks are added to a service request by users. See the following table for a breakdown of where these tasks are available. Valid values: `SYSTEM`, `TEMPLATE`, `PROCESS_SETUP`, and `AD_HOC`. See Configuration level codes for more information.
   - ICON: The styled icon to display in the task grid. For example, `thumbs-o-up`.
   - COLOR: The hex color for the icon. For example, `#F96502`.

Configuration level codes

The configuration level code determines how the tasks are able to be added by users. See the following table for a breakdown of how task types with these configurations are able to be added to an onboarding process.

	SYSTEM	TEMPLATE	AD_HOC
Can be automatically kicked off by a process model.	X	X	X
Can be added to the task library in Connected FS Settings.		X	X
Can be added as a custom task from the Home page or as a related action.			X

SYSTEM

What it is

This configuration type is generally for automated tasks that can only be kicked off from a process model.

When you would use it

You would use this type of task when:

- You want the task to be automatically completed using a process model.

And when an end user would never need to add this type of task:

- To the task library in Connected FS Settings.
- As a custom task from the Home page or as a related action.

Example

A document reconciliation task - After a user uploads a new document, a task is automatically kicked off if the document type does not meet the confidence threshold. When adding a default task to the task library or a custom task to a service request, end users do not have access to add this task type.

TEMPLATE

What it is

This configuration is for tasks that you want Connected FS Settings users to have available to use in service request templates, but you don't want regular users to have available when adding a custom task to a service request.

When you would use it

You would use this type of task when you want the task:

- To be added to the task library in Connected FS Settings.

In addition, when an end user would never need to add this type of task:

- As a custom task from the Home page or as a related action.

Example

Out of the box, there are no tasks with this configuration.

AD_HOC

What it is

This configuration type is for tasks that users send out as a related action from a service request record. Rather than waiting for the task to be kicked off by a precedent or a process model, the user is kicking off the task right away when using this configuration type.

When you would use it

You would use this type of task when you want the task:

- To be added to the task library in Connected FS Settings.
- To be available as a custom task from the service request record as a related action.

Example

Review task - Can be added as a new task in the task library or as a custom task from the service request record.

Create a constant for the new task type

After you add the task type to the reference table, you will need to create a constant to easily reference the task type in the application.

To create a constant for the new task type:

- Create a new constant to point to the new task type.
    - Use the naming convention `AS_TMG_ENUM_TASK_BEHAVIOR_SUBTYPE_CODE_<TASK_TYPE>`. Replace with the `BEHAVIOR_SUBTYPE_CODE` value from the reference data table.
    - For the **Type**, select **Text**.
    - For **Value**, enter the `BEHAVIOR_SUBTYPE_CODE` value from the reference data table.
    - Save it in the `AS TMG SAIL Design Objects` folder.
    - **Example**: `AS_TMG_ENUM_TASK_BEHAVIOR_SUBTYPE_CODE_CONFIRMATION` constant.

Create the new task type

All tasks have one of three behaviors: automated, data entry, or confirmation. This task type confirms that a task has been completed so most likely you will not need to create a new confirmation task. Note that this task type always uses the same interface and process model. However, you may want to create a different DATA_ENTRY task or AUTOMATED task.

Creating a new data entry task

A data entry task requires the end user to input some sort of data. The solution has three types of out-of-the- box data entry tasks: **Review**, **Document Upload**, and **Enter new customer address**.

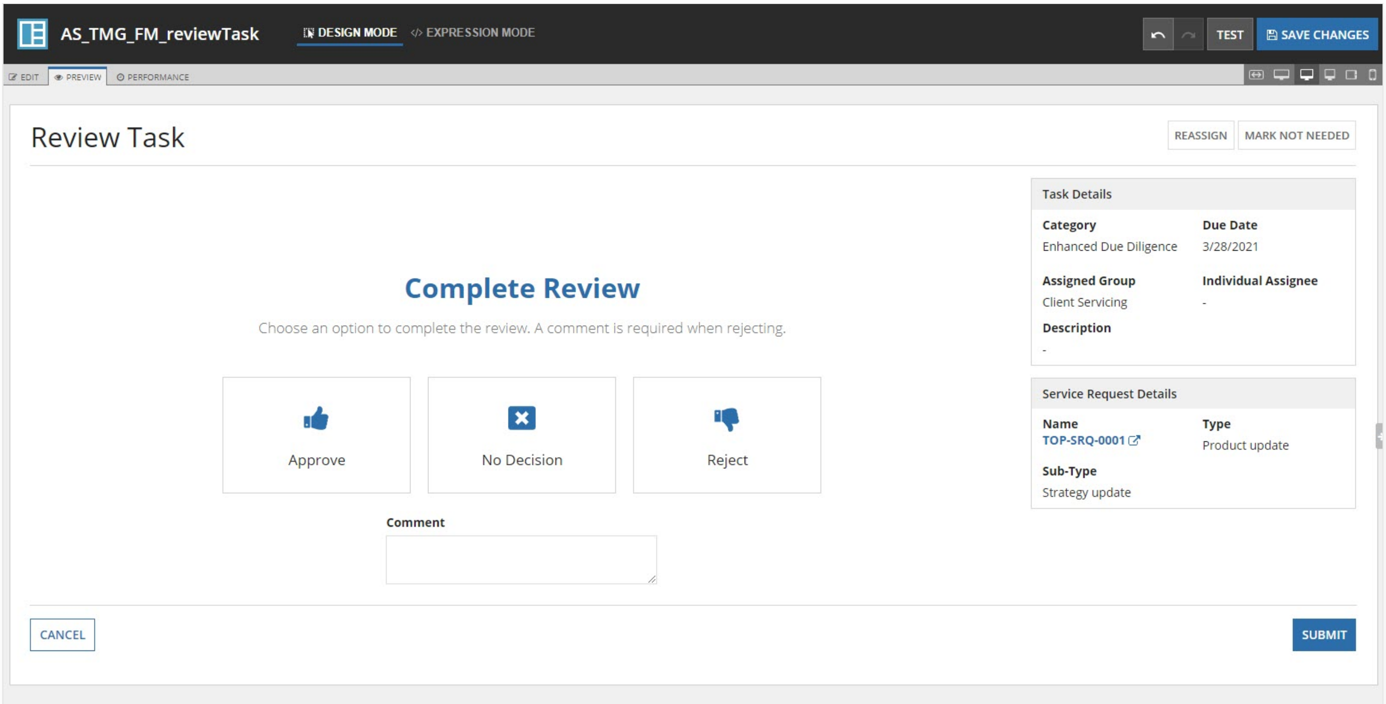
See the Task type reference table for more information on how to update these tasks.

Create an interface for the process start form

To use a task type in the application, you must create a user interface that will allow end users to complete the task type. Next, you'll create a new process model that uses the interface as the process start form.

When creating a new interface with fields that capture all the information required for this new task type:

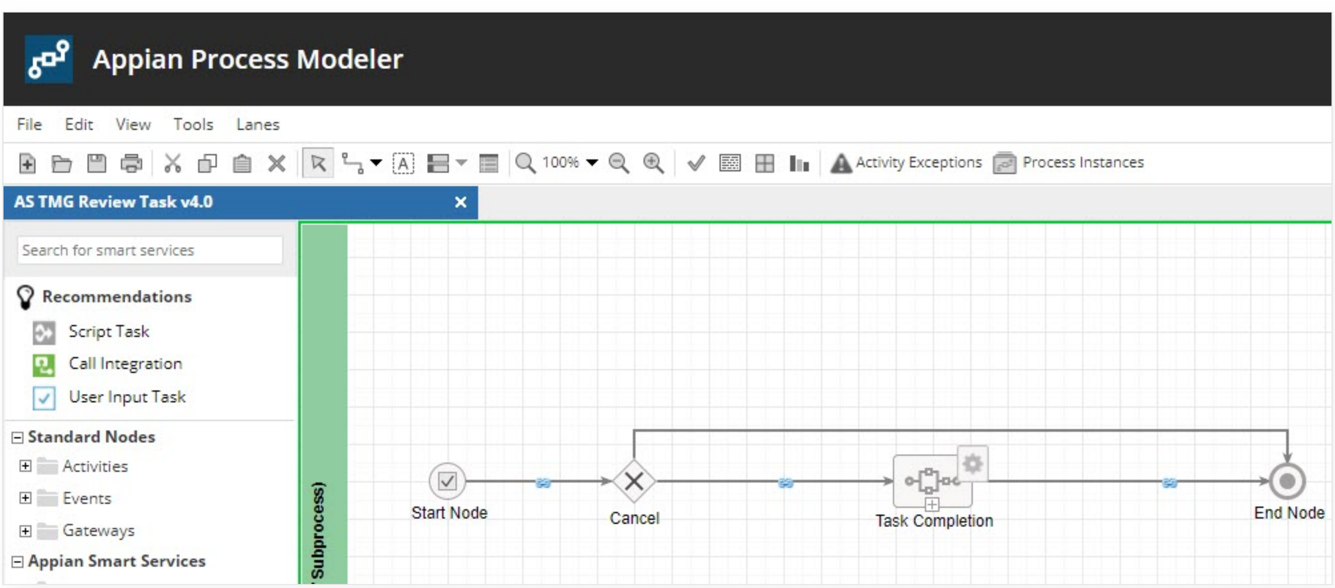
- Make sure this interface has a rule input called `task` that has the `AS_TMG_Task` data type.
  - **Example**: `AS_TMG_FM_reviewTask` interface.



Create a new process model for the task

When creating a process model that uses the new interface as the process start form:

- Make sure this process model has a process parameter called `task` that has the `AS_TMG_Task` data type.
- Configure a process start form using the new interface.
- Configure a subprocess using `AS TMG Task Completion`.
  - **Example**: `AS TMG Review Task` process model.

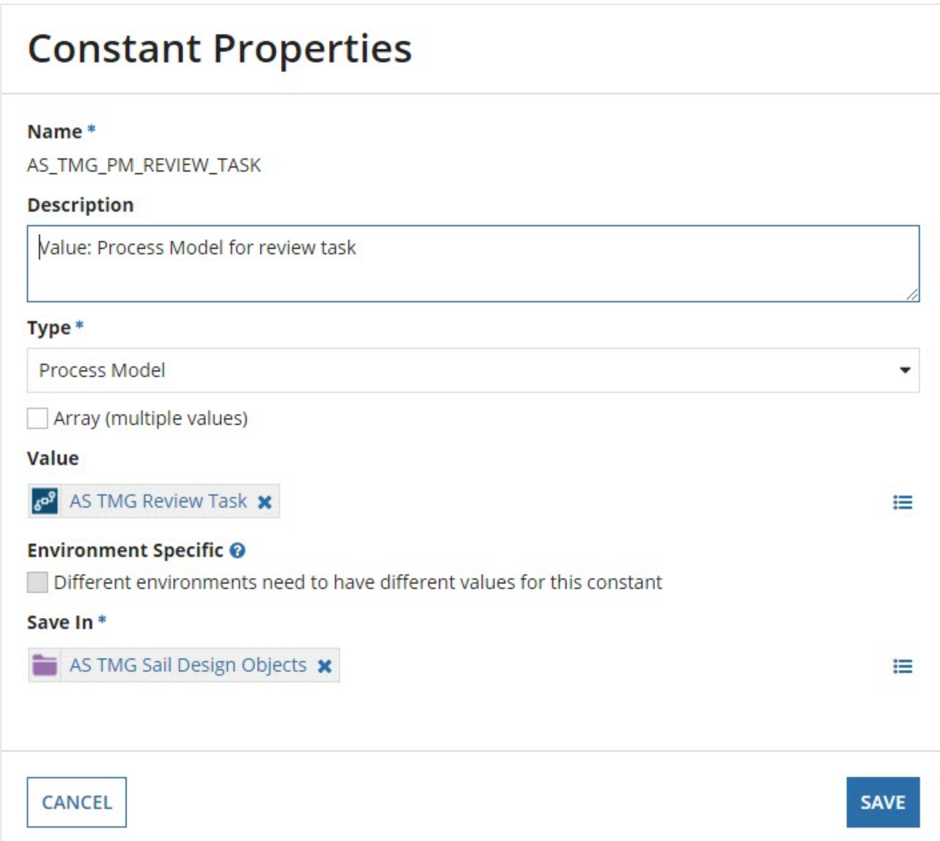


Create a constant to point to the new process model

You will use the new process model in the `AS_TMG_UI_taskGrid_colTaskName` expression rule, which is used in the `AS_TMG_GRD_runtimeTaskGrid` interface. In order to call the process model in the expression rule, you need to create a constant that points to the process model.

To Create a new constant to point to the new process model:

- Use the naming convention `AS_TMG_PM_<NAME>`.
- For the **Type**, select **Process Model**.
- For **Value**, select the new process model.
- Save it in the `AS TMG SAIL Design Objects` folder.
    - **Example**: `AS_TMG_PM_REVIEW_TASK` constant.



Add the new task type to the task grid

In order for the link to the new task type to appear in the task grid, you need to add it to the `AS_TMG_UI_taskGrid_colTaskName` expression rule used in the `AS_TMG_GRD_runtimeTaskGrid` interface.

To add the new task type to the task grid:

1. Open the `AS_TMG_UI_taskGrid_colTaskName` interface.
2. In the `a!startProcessLink()` function, add the behavior subtype code constant created above to the list of behavior subtype code constants in this rule.
3. Add a `map` parameter with the process constant created above with the task as a parameter in the corresponding position in the list of maps in this rule.

Add a read-only view for the tasks tab

In order for users to be able to see completion details of the task on the **Tasks** tab of the record, you need to add it to the `AS_TMG_FM_viewTaskDetailsInTaskTab` interface.

To add the new task type to the **Tasks** tab:

1. Add the new behavior subtype code to the list of codes in `AS_TMG_UT_behaviorSubTypeCodesForViewTask`.
2. Add a new `readOnly` interface to `AS_TMG_FM_viewTaskDetailsInTaskTab` in the corresponding position.

Creating a new automated task

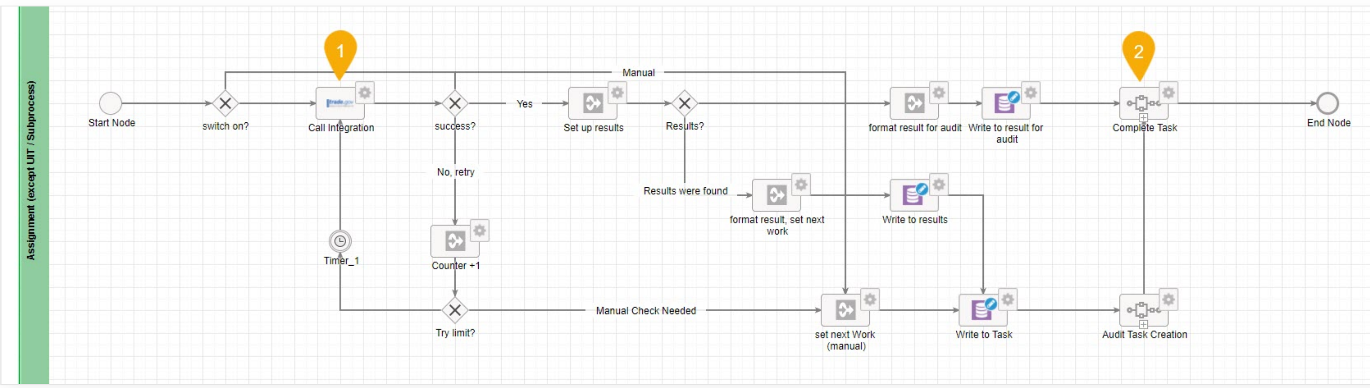
An automated task is kicked off when it's created or when its precedents are completed. It requires no user interaction; it is initiated and and completed by the system. For an example of how to configure an automated task type in the database, see **Consolidated Screening Check** in the below table.

TASK_BEHAVIOR_TYPE_ID	BEHAVIOR_TYPE_CODE	BEHAVIOR_DISPLAY_NAME	BEHAVIOR_SUBTYPE_CODE	CONFIGURATION_LEVEL_CODE	ICON	COLOR
5	AUTOMATED	Consolidated Screening Check	CSL_CHECK	PROCESS_SETUP	NULL	NULL

Create a new process model for the task

Now, you need to create a process model for the new automated task that will run as an automated activity.

- Make sure this process model has a process parameter called `task` that has the `AS_TMG_Task` data type.
- Configure the process model nodes that will run as an automated activity..
  - See **Step 1** in the screenshot below
- After the automated nodes complete, configure a sub-process using the `AS TMG Task Completion` process model.
  - **Example**: `AS TMG Consolidated Screening Check Integration` process model.
  - See **Step 2** in the screenshot below



Modifying Key Dates

Introduction

Task due dates allow the Connected Servicing solution to quantitatively measure if service requests and their associated tasks are being completed on time. Further details and data about task due dates across an institution are displayed on the reports tab.

By default, task due dates are calculated based on a service request's target completion date. This is set by the business owner in the Connected FS Settings site. A task's due date may also be calculated based on other associated due dates for that service request.

Adding a key date

The examples in this section will follow adding After Created Date as a key date option.

Step 1: Add a new key date rule to the database

Add a new row in the `AS_SRQ_R_DATA` table with the following attributes:

- LABEL: The bundle label key
- TYPE: SLA Rule Type
- CODE: SLA_RULE_TYPE_NEW_KEY_DATE
- IS_ACTIVE: true (1)
- CREATED_BY: Your Appian username.
- CREATED_DATETIME: The current timestamp, in the format YYYY-MM-DD HH:MM:SS.
- MODIFIED_BY: Your Appian username.
- MODIFIED_DATETIME: The current timestamp, in the format YYYY-MM-DD HH:MM:SS.

EXAMPLE

```
INSERT INTO `AS_SRQ_R_DATA` (`R_DATA_ID`, `LABEL`, `TYPE`, `CODE`, `SORT_ORDER`, `ICON`, `COLOR`, `IS_ACTIVE`, `CREATED_BY`,
VALUES (NULL, 'AS.SRQ.SlaRuleType.lbl_AfterCreatedDate', 'SLA Rule Type', 'SLA_RULE_TYPE_AFTER_CREATED_DATE', NULL, '', '', '1',
```

Step 2: Create a constant for the new SLA rule

Create a new constant that's value is the code from the row in the database you added to `AS_SRQ_R_DATA` in Step 1.

EXAMPLE

Create a constant called `AS_SRQ_ENUM_SLA_RULE_AFTER_CREATED_DATE` with the value: SLA_RULE_TYPE_AFTER_CREATED_DATE.

Step 3: Update the bundle file

Open the SlaRuleType bundle file in each language and add the labelKey in that you added to the `AS_SRQ_R_DATA` in Step 1.

EXAMPLE

```
lbl_BeforeFundingDate=Before Funding Date
lbl_AfterFundingDate=After Actual Funding Date
!lbl_AfterCreatedDate=After Created Date
```

Step 4: Update the rule to calculate due dates

Open up the rule `AS_TMG_BL_calculateTaskDueDateFromSlaDays` and add to the conditional if() statement the logic needed for the new key date and add the new date as a rule input.

EXAMPLE

AS_TMG_calculateTaskDueDateFromSlaDays Rule

```
if(
  or(
    rule!AS_CO_UT_isBlank(
      ri!slaDays
    ),
    rule!AS_CO_UT_isBlank(
      ri!fundingDate
    ),
   rule!AS_CO_UT_isBlank(
     ri!createdDate
   )
  ),
  null,
  if(
    ri!slaRule = cons!AS_TMG_ENUM_SLA_RULE_BEFORE_EST_FUNDING_DATE,
    if(
      ri!slaDayType = cons!AS_TMG_ENUM_SLA_DAY_TYPE_BUSINESS_DAYS,
      workday(
        ri!fundingDate,
        - ri!slaDays
      ),
      /*default is calendar days*/
      ri!fundingDate - ri!slaDays,

    ),
   if(
     ri!slaRule = cons!AS_SRQ_ENUM_SLA_RULE_AFTER_CREATED_DATE,
     if(
       ri!slaDayType = cons!AS_SRQ_ENUM_SLA_DAY_TYPE_BUSINESS_DAYS,
       workday(
         ri!createdDate,
         - ri!slaDays
       ),
       /*default is calendar days*/
       ri!createdDate - ri!slaDays,
     ),
      if(
        ri!slaDayType = cons!AS_TMG_ENUM_SLA_DAY_TYPE_BUSINESS_DAYS,
        workday(
          ri!fundingDate,
          + ri!slaDays
        ),
        /*default is calendar days*/
        ri!fundingDate + ri!slaDays,

      )
    )
  )
)

```

Step 5: Add the new rule input to all dependent rules

Add new rule input to the two rules that `AS_TMG_BL_calculateTaskDueDateFromSlaDays` is dependent on and then pass in the appropriate logic.

The rules to update are:

1. AS_TMG_CDT_mapTemplateTaskToRuntimeTask
2. AS_TMG_UT_updateTasksDueDate

EXAMPLE

AS_TMG_CDT_mapTemplateTaskToRuntimeTask Rule

```
...
  modifiedDatetime: null,
  dueDate: rule!AS_TMG_BL_calculateTaskDueDateFromSlaDays(
    slaDays: ri!templateTask.slaDays,
    slaRule: ri!templateTask.slaRule,
    fundingDate: ri!request.fundingDetails.estFundingDate,
    slaDayType: ri!template.slaDayType,
   createdDate: todate(ri!request.createdDatetime)
  ),
  slaDays: ri!templateTask.slaDays,
  slaRule: ri!templateTask.slaRule
)
```

Removing a key date

To remove a key date from the dropdown list in Connected FS settings, update the 'isActive' column to false (0) in the AS_SRQ_R_DATA table for the corresponding row.

Modifying Product Fields

Introduction

When a user adds a product to a customer, the user is required to fill out specific product-related details. Each product may have its own unique fields that the user is required to complete.

For example, the product type of **Committed Line of Credit** will allow the user to enter the fields for **Collateral** and **Cover Required (%)**. Whereas, the product type **Equities** will allow the user to enter the **Strategy** and **Entity** type.

This page outlines how to set up the fields you want to show and require for each product type.

Product field sections

There can be several fields the user might need to fill out for a single product. Therefore, in order to make it easier to add details for a product, Connected Servicing has grouped the product fields into six sections.

The default product sections are:

- Details
- Collateral
- Terms
- Accounts
- Fees
- Thresholds

Adding a new product section

To add a new product section:

1. Create a new **SECTION_KEY** constant named AS_FS_ENUM_PRODUCT_SECTION_KEY_<SECTION_NAME>.
2. Set the value of the constant equal to the new section name.
    - **Note**: Use all caps when setting the constant value.
3. Create a new expression rule named AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME> to hold all of the fields that will show up in this section.
4. Add the following rule inputs:
5. `product` (AS_FS_Product) - this will be used to save the data when it appears on the form.
6. `i18nData` (Any Type) - this will properly show the user the correct language for the corresponding label when the application is internationalized.
7. `adminSetupI18nData` (Any Type) - this holds the internationalization data for that when the application is internationalized.
8. `isInternationalizedForAdminSetup` (boolean) - this is a true or false value that defines if this field is internationalized.
9. Add the field definitions to this rule that you want to be associated with this section. The field definitions are dictionary structures with the following keys.
    - **fieldKey** - the product field key constant.
    - **sectionKey** - the section key constant that you created earlier.
    - **cdtField** - the field on the `Product` CDT that will save the data.
    - **isValid** - any validations that are relevant for the field being saved.

    EXAMPLE:

```
/* Interest field */
{
  fieldKey: cons!AS_FS_ENUM_PRODUCT_FIELD_KEY_DETAILS_INTEREST,
  sectionKey: cons!AS_FS_ENUM_PRODUCT_SECTION_KEY_DETAILS,
  cdtField: { "interest" },
  isValid: if(
    rule!AS_CO_UT_isBlank(ri!product),
    null,
    or(
      isnull(ri!product.interest),
      ri!product.interest >= 0
      )
    )
  }
```

10. Repeat the expression rule, AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME>, creation for a new field for as many fields that you would like to add.
11. Add AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME> rule that you created to the parent rule AS_FS_REF_ALL_PRODUCT_FIELDS, which holds all of the sections and fields.
12. Pass in the proper rule inputs.
13. Create a new display interface named AS_FS_CPS_OnboardingRequestProducts_<SectionName>Section.
14. Add the following rule inputs:
    - fieldData (Any Type) - shows the information used from the expression rule AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME>.
    - i18nData (Any Type) - show the user the correct language for the corresponding label when the application is internationalized.
    - product (AS_FS_Product) - saves the data when it appears on the form.
    - refData (List of AS_FS_R_Data) - passes in the reference data.
    - **Note:** You do not need to include this if your field does not require reference data. - readOnly (boolean) - determines if the field should be read only or not. - funds (Array of AS_FS_Fund) - references funds if fund data is needed.
15. Add the local variable local!visible<SectionName>Fields and set the value to

```
local!visible<SectionName>Fields: rule!AS_CO_UT_filterCdtByField(
cdt: ri!fieldData,
field: "fieldKey",
value: rule!AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME>(isInternationalizedForAdminSetup: false).fieldKey
)
```

16. If local!visible<SectionName>Fields is not blank then you will call rule for the display header and a rule to display the appropriate fields.

```
 if(
rule!AS_CO_UT_isBlank(local!visible<SectionName>Fields),
{},
{
  rule!AS_CO_SBS_StampHeader(
       icon: "list-alt",
    label: rule!AS_CO_I18N_UT_displayLabel(
      i18nData: ri!i18nData,
         bundleKey: "ProductField.lbl_<section_name>Section"
    ),
    size: "SMALL"
  ),
  rule!AS_CO_CPS_dynamicTwoOrFourColumnDisplay(
    numberOfColumns: if(ri!readOnly, 4, 2),
       allFields: {

    }
  )
}
 )
```

17. Change the highlighted values for icon and label for what icon and name you want to show for the new section.
18. Create a local variable named local!<FIELD_KEY>FieldData to determine the correct field data and a dictionary structure with the following key-value pairs:
    - **span** - Either 1 or 2, which determines the number of columns this field will take up.
    - **components** - the field type(s) to be displayed for the data field being collected.
19. Fill in the highlighted allFields structure with each of the associated fields for the new section with the new local variable.

EXAMPLE

```
a!localVariables(
  local!interestFieldData: rule!AS_CO_UT_filterCdtByField(
    cdt: local!visibleDetailsFields,
    field: "fieldKey",
    value: cons!AS_FS_ENUM_PRODUCT_FIELD_KEY_DETAILS_INTEREST
  ),
  {
    span: 2,
    components: rule!AS_CO_INP_paragraphField(
      showWhen: rule!AS_CO_UT_isNotBlank(local!descriptionFieldData),
      required: local!descriptionFieldData.required,
      label: rule!AS_CO_I18N_UT_displayLabel(
        i18nData: ri!i18nData,
        bundleKey: "Product.lbl_Description"
      ),
      readOnly: ri!readOnly,
      value: ri!product.description,
      maxLength: cons!AS_CO_ENUM_PARAGRAPH_LENGTH_MEDIUM,
      saveInto: ri!product.description,
      height: "SHORT",
      placeholder: rule!AS_CO_I18N_UT_displayLabel(
        i18nData: ri!i18nData,
        bundleKey: "ProductField.plc_EnterProductDescription"
      )
    )
  }
)
```

- **Note:** the order that the fields are listed in the section display interface rule is the order they will be shown to the end user.
   1. In the AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING table, add the fields into the FIELD_DATA column using the following JSON format {"fieldKey":"FIELD_KEY>","required":}, for the products that you want to display.

Removing a product section

To remove a product section:

1. Delete the section field rule AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME> you would like to remove from the expression rule AS_FS_REF_ALL_PRODUCT_FIELDS.
2. Delete the corresponding display rule AS_FS_CPS_OnboardingRequestProducts_<SectionName>Section.

Product fields

Connected Onboarding comes with 35 data fields that are available for users to enter additional product information. The fields that are available by default can be found by searching the objects for any constant with the prefix **AS_FS_ENUM_PRODUCT_FIELD_KEY**.

Adding a new product field

To add a new product field:

1. Create a new constant for the field called **AS_FS_ENUM_PRODUCT_FIELD_KEY_[SECTION_NAME]_[FIELD_NAME]**.
2. Set the value to SECTION_NAME_FIELD_NAME.
   - **SECTION_NAME** - the section that the product field will show up in.
   - **FIELD_NAME** - the name of the product field.
3. Open the AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME> expression rule.
4. Add a new array to the rule that will display the new field with the following key-value pairs.
   - **fieldKey** - the product field key constant.
   - **sectionKey** - the section key constant.
   - **cdtField** - the field on the Product CDT that will save the data.
   - **isValid** - any validations that are relevant for the field being saved.

EXAMPLE:

```
/* Interest field */
{
  fieldKey: cons!AS_FS_ENUM_PRODUCT_FIELD_KEY_DETAILS_INTEREST,
  sectionKey: cons!AS_FS_ENUM_PRODUCT_SECTION_KEY_DETAILS,
  cdtField: { "interest" },
  isValid: if(
    rule!AS_CO_UT_isBlank(ri!product),
    null,
    or(
      isnull(ri!product.interest),
      ri!product.interest >= 0
    )
  )
}
```

1. Open the AS_FS_CPS_OnboardingRequestProducts_<SectionName>Section expression rule.
2. Add a new array for new local variable named local!<FIELD_KEY>FieldData to filter the data to the proper field.
    - **Note:** Add this new array in the same order you would like the field to appear in the section.
3. Add the dictionary with the following key-value pairs in the same array:
    - **span** - Determines the number of columns this field will take up. Valid values 1 or 2.
    - **components** - the field type(s) to be displayed for the collected data field.

EXAMPLE

```
a!localVariables(
  local!interestFieldData: rule!AS_CO_UT_filterCdtByField(
    cdt: local!visibleDetailsFields,
    field: "fieldKey",
    value: cons!AS_FS_ENUM_PRODUCT_FIELD_KEY_DETAILS_INTEREST
  ),
  {
    span: 2,
    components: rule!AS_CO_INP_paragraphField(
      showWhen: rule!AS_CO_UT_isNotBlank(local!descriptionFieldData),
      required: local!descriptionFieldData.required,
      label: rule!AS_CO_I18N_UT_displayLabel(
        i18nData: ri!i18nData,
        bundleKey: "Product.lbl_Description"
      ),
      readOnly: ri!readOnly,
      value: ri!product.description,
      maxLength: cons!AS_CO_ENUM_PARAGRAPH_LENGTH_MEDIUM,
      saveInto: ri!product.description,
      height: "SHORT",
      placeholder: rule!AS_CO_I18N_UT_displayLabel(
        i18nData: ri!i18nData,
        bundleKey: "ProductField.plc_EnterProductDescription"
      )
    )
  }
)
```

1. In the AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING table, use the following JSON format {"fieldKey":"<FIELD_KEY>","required":} to add the fields into the FIELD_DATA column for the products that you want to display.

Removing a product field

To remove a product field:

1. From the AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING table, remove any JSON structures with the corresponding **fieldKey** that you want to remove from the FIELD_DATA column.
2. Open the AS_FS_CPS_OnboardingRequestProducts_<SectionName>Section interface.
3. Remove all code with a reference to the **fieldKey** of the field you want to remove.
4. Open the AS_FS_REF_PRODUCT_FIELDS_<SECTION_NAME> expression rule.
5. Remove the dictionary structure containing the **fieldKey** of the field you want to remove.

Mapping product fields to a specific product

Product fields are mapped to products in the AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING reference table. When a product type is added by the user, a new row is added to this table to manage which fields will show up when that product type is added to an onboarding

Updating product type mappings

If a product type does not have the right fields by default, a user can modify which product fields show up by modifying the FIELD_DATA column in the AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING table.

The FIELD_DATA column is used to determine which fields show up for each product and also which fields will be required. For each product, the FIELD_DATA column holds a JSON mapping of a field, section, and if the field is required.

**EXAMPLE OF JSON IN FIELD_DATA FOR PRODUCT TYPE COMMODITIES **

```
 {{"fieldKey":"DETAILS_AMOUNT","required":false},
! {"fieldKey":"DETAILS_ENTITY","required":true},
 {"fieldKey":"DETAILS_STRATEGY","required":false},
 {"fieldKey":"DETAILS_DURATION","required":true},
 {"fieldKey":"DETAILS_UPFRONT_FEE","required":false},
 {"fieldKey":"DETAILS_RESTRICTED_COUNTRIES","required":false},
 {"fieldKey":"DETAILS_PERMISSIBLE_COUNTRIES","required":false}}
```

For each product, The **FIELD_KEY** determines the section and the field, and **REQUIRED** determines if the field will be required on the page. For example, for the highlighted row above, the **ENTITY** field will show up in the **DETAILS** section and it will be required when a commodities product is added to an onboarding.

Add a field mapping for an existing field to a product type

If a new field is needed for a product type, you will need to edit the JSON in the `FIELD_DATA` column of the `AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING` table. For the product type you want to update, add a new JSON dictionary structure for the field that you want to add and update the `FIELD_DATA` column in the database.

Remove a field mapping from a product type

If a field is no longer needed for a product type, you will need to edit the JSON in the `FIELD_DATA` column of the `AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING` table.

Change requiredness of a field mapping

To change requiredness of a specific field, edit the JSON in the `FIELD_DATA` column. Update the **REQUIRED** structure of the **FIELD_KEY** that you want to change then update the `FIELD_DATA` column. Valid values: `true` or `false`.

Default product fields for a new product type

Because the user can create a new product type from the Connected Onboarding settings page, when the new product is added to the `AS_FS_R_PRODUCT_TYPE_FIELD_MAPPING` table, it will have all product fields associated with the new product by default. These fields are not required.

To update the default product type fields:

1. Open the `AS_FS_constructProductTypeFieldMapping` expression rule.
2. Update the local variable `local!refData` to filter out the fields you do not want to be part of a product by default.

Default product fields and sections

The default sections and their corresponding fields are listed in the table below.

Section	Default Fields
Details	Amount
	Commitment fee rate
	Description
	Duration
	Entity
	Fund
	Interest
	Permissible countries
	Restricted countries
	Strategy
	Upfront fee
Collateral	Collateral
	Collateral value
	Cover provided
	Cover required
Terms	Committed margin
	Other
	Performance return term
	Performance start date
	Rate lock
	Short lock

Accounts	Account Number
	Name
	Type
Fees	Ad valorem
	Market
	Minimum
	Minimum currency
	Period
	Transaction charge
	Transaction charge currency
Thresholds	Amount
	Currency
	Number of Authorizations
	Operator

Groups Reference Page

Introduction

Connected Servicing comes with a number of groups provided by default. By adding users to these groups, you can grant access to separate parts of the application.

There are three categories that the default groups belong to:

- **Business Groups**
  - These groups represent the different business roles that will interact with the application.
    - Examples include **Client Servicing** and **Legal**.
  - **Customers** is a special type of business group. In order to ensure customers can only see their data and no other customer data, a user may only be added to one customer group at a time.
- **Security Groups**
  - These groups are set as the security for certain Appian objects. Different business groups are members of security groups to grant access to application functionality to entire roles.
    - Examples include **AS SRQ Create Service Request** and **AS SRQ Upload Document**.
- **Wrapper Groups**
  - These groups are used to group together a number of groups of the same category. For instance, a list of business groups may be added to a certain wrapper group. This allows for querying for all groups of a certain category in different parts of the application.
    - Examples include **AS FS Internal Users** and **AS FS Managers**.

This page lists the default groups provided with Connected Servicing, what business groups belong to which wrapper and security groups, and what actions members of the security groups can perform.

To update group membership from the Connected FS Settings site, see Managing Group Membership. To modify groups and add users from Appian Designer, see Modifying groups.

Group visibility

In order for the correct groups to show up in application pickers, each type of group has the following visibility settings:

Group Type	Visibility	Reason
Business group	Public	End users should be able to select business groups in application pickers.
Security group	Private	End users should never see security groups in application pickers.
Wrapper group	Private	End users should never see wrapper groups in application pickers.

Wrapper group membership

This table lists all of the default business groups and the wrapper group that they belong to.

Department head groups are also members of the associated Connected Servicing Internal Users groups. For example, **Client Servicing Department Heads** is also a member of **Client Servicing**.

The business groups are all members of the **AS FS All Business Users** group type.

Wrapper Group	Business Group
AS FS External Users	Customer
AS FS Internal Users	Back Office
	Client Onboarding
	Client Servicing
	Compliance
	Credit
	Finance
	Front Office
	KYC
	Legal
	Middle Office
	Risk
	Sales
	Tax
	All department head groups (subgroups of these groups)
AS FS Managers	Back Office Department Heads
	Client Onboarding Department Heads
	Client Servicing Department Heads
	Compliance Department Heads
	Credit Department Heads
	Finance Department Heads
	Front Office Department Heads
	KYC Department Heads
	Legal Department Heads
	Middle Office Department Heads
	Risk Department Heads
	Sales Department Heads
	Tax Department Heads

Actions users can perform based on their group membership

This table lists all of the actions that are available in Connected Servicing and the security groups that control access to those actions. It also lists the business groups that are members of each security group.

For security groups where no business group is listed, it is preferable to grant membership to individual users.

The security groups are all members of the **AS SRQ Security Groups** group.

Actions that Members Can Perform	Security Group	Member Business Groups
Receive automatic process model alerts.	AS FS Designer Alerts Group	
Manage Appian design objects.	AS FS Appian Administrators	
View the Connected FS Settings site and update processes from this site.	AS SRQ Task Management Access	
View the Connected FS Settings site and update group membership.	AS FS GM Manage Group Membership	
Assign owners to service requests.	AS SRQ Assign Owner	• Client Servicing • Client Servicing Department Heads (subgroup)
Cancel a service request.	AS SRQ Cancel Service Request	
Complete a service request.	AS SRQ Complete Service Request	
Create custom tasks for a service request.	AS TMG Create Ad Hoc Tasks Access	
Send out queued tasks.	AS TMG Initiate Tasks Access	
Reopen tasks that have been completed, marked not needed, or canceled.	AS TMG Reopen Tasks Access	
Update individual task due dates.	AS TMG Update Task Due Date Access	
Create service requests.	AS SRQ Create Service Request	• Client Servicing • Client Servicing Department Heads (subgroup) • Sales • Sales Department Heads (subgroup)
Create new customer records.	AS FS Create Customer	AS FS Internal Users
View customer records.	AS FS Customer Viewers	
Attach documents to service requests.	AS SRQ Upload Document	
View the Home page for users who are department heads.	AS SRQ Manager Landing Page Viewers	
View the service request records.	AS SRQ Service Request Viewers	
View the Connected Servicing site.	AS SRQ Site Viewer	
Receive tasks.	AS TMG Task Recipients	
Update customer details from the customer record.	AS FS Update Customer Access	
Post to a service request discussion.	AS SRQ RC Create Comment Access	
Update contact information for a customer.	AS FS Create Update Contact Access	

Reference Data Tables

Introduction

The Appian Connected Servicing solution is designed to be customized to your organization's particular needs. The various interfaces in the out-of-the box solution contain values that are stored in database tables. This information is called reference data.

The types of reference data in Connected Servicing are:

- Dropdown lists and their values.
  - See Modifying Dropdown Lists for instructions on how to add and deactivate values in dropdown lists, add new dropdown lists, and internationalize dropdown list values.
- Tasks.
  - See Adding a New Task Type for information on how to add a new task type.
- Process templates.

You can identify reference data tables by looking for tables that have `_R_` in the name, such as `AS_FS_R_DATA`.

This page describes the structure of the reference data tables.

Shared reference data table

Some dropdown values for Connected Servicing are stored in the `AS_FS_R_DATA` table. Updating this table allows you control what dropdown values and lists that cannot be modified in the Connected FS Settings site.See Modifying Dropdown Lists for more information on how this table is used. This data in this table can be used across Connected Servicing and other financial services solutions such as, Connected Onboarding.

See the following table for a description of the fields in the `AS_FS_R_DATA` table.

Name	MySQL Data Type	Appian Data Type	Description
R_DATA_ID	int(11)	Number (integer)	The primary key.
LABEL	varchar(255)	Text	The label code that will be internationalization and shown to the end user.
TYPE	varchar(255)	Text	What reference type the data is grouped by. For example, `Service Request Status`.
CODE	varchar(255)	Text	The value used to reference this row in transaction tables.
SORT_ORDER	int(11)	Number (integer)	The order in which the value will be displayed if order matters in the place this value is displayed.
IS_ACTIVE	tinyint(1)	Boolean	Determines if the value will display, or not. Valid values: `1`, `0`. `1` will display the value and `0` will not display the value
ICON	varchar(255)	Text	The icon displayed with this value.
COLOR	varchar(255)	Text	The color of the icon displayed with this value.
CREATED_BY	varchar(255)	Text	The user who added the reference data originally.
CREATED_DATETIME	timestamp	DateTime	The date and time that the reference data was originally added.
MODIFIED_BY	varchar(255)	Text	The user who changed the reference data most recently.
MODIFIED_DATETIME	timestamp	DateTime	The date and time that the reference data was most recently changed.

See below for an example of what the first six columns of the reference data may look like:

R_DATA_ID	LABEL	TYPE	CODE	IS_ACTIVE
69	AS.FS.DocumentStatus.lbl_Accepted	Document Status	DOCUMENT_STATUS_ACCEPTED	1
88	AS.FS.DocumentStatus.lbl_Rejected	Document Status	DOCUMENT_STATUS_REJECTED	1
89	AS.FS.DocumentStatus.lbl_Submitted	Document Status	DOCUMENT_STATUS_SUBMITTED	1
181	AS.FS.DocumentStatus.lbl_AwaitingClassification	Document Status	DOCUMENT_STATUS_AWAITING_CLASSIFICATION	1

Connected Servicing only reference table

While the shared values for all financial solutions are stored in the shared reference data table, the remaining values for Connected Servicing are stored in the `AS_SRQ_R_DATA` table. This enables you to update information that is Connected Servicing specific. See Modifying Dropdown Lists for more information.

See the following table for a description of the fields in the `AS_SRQ_R_DATA` table.

Name	MySQL Data Type	Appian Data Type	Description
R_DATA_ID	int(11)	Number (integer)	The primary key.
LABEL	varchar(255)	Text	The internationalization bundle key used to display the value.
TYPE	varchar(255)	Text	What reference type the value is grouped by. For example, `Service Request Status`.
CODE	varchar(255)	Text	The value used to reference this row in transaction tables
SORT_ORDER	int(11)	Number (integer)	Determines the order of values displayed in the dropdown.
ICON	varchar(50)	Text	The icon associated with the value. For more information, visit the Appian icons page.
COLOR	varchar(50)	Text	Determines the color associated with the data. Valid values: STANDARD, POSITIVE, NEGATIVE, ACCENT, or a specific hex value. For example, `#FFBF00`.
IS_ACTIVE	tinyint(1)	Boolean	Determines if the value will display, or not. Valid values: `1`, `0`. `1` will display the value and `0` will not display the value
CREATED_BY	varchar(255)	Text	The user who added the reference data originally.
CREATED_DATETIME	timestamp	DateTime	The date and time that the reference data was originally added.
MODIFIED_BY	varchar(255)	Text	The user who changed the reference data most recently.
MODIFIED_DATETIME	timestamp	DateTime	The date and time that the reference data was most recently changed.

See below for an example of what the seven nine columns of the reference data may look like:

R_DATA_ID	LABEL	TYPE	CODE	SORT_ORDER	ICON	COLOR
2	Assigned	Task Status	ts_2	*NULL*	spinner	STANDARD
3	Assigned	Task Status	ts_2	*NULL*	spinner	ACCENT
4	In Progress	Task Status	ts_1	*NULL*	spinner	STANDARD
5	Canceled	Task Status	ts_3	*NULL*	spinner	STANDARD
6	Closed	Account Status	acctst_2	*NULL*	times-circle	NEGATIVE
7	Approve	Service Request Review	srqrw_1	*NULL*	thumbs-up	ACCENT
8	Reject	Service Request Review	srqrw_2	*NULL*	thumbs-down	ACCENT
9	Active	Service Request Status	rs_2	*NULL*	spinner	STANDARD
10	Low	Service Request Priority	srqprty_2	*NULL*	tachometer	POSITIVE

Task type reference table

The `AS_TMG_R_TASK_BEHAVIOR_TYPE` table stores the behavior of all of the task types in the Connected Servicing application. Updating this table allows you to add new data types. See Adding a New Task Type for more information on how to do this.

Name	MySQL Data Type	Appian Data Type	Description

Name	MySQL Data Type	Appian Data Type	Description
TASK_BEHAVIOR_TYPE_ID	int(11)	Number (integer)	The primary key.
BEHAVIOR_TYPE_CODE	varchar(255)	Text	The code to determine the behavior of the task. Possible values: `CHECKBOX`, `DATA_ENTRY` and `AUTOMATED`.
BEHAVIOR_DISPLAY_NAME	varchar(255)	Text	The behavior name that displays to the end user.
CREATED_BY	varchar(255)	Text	The user who added the behavior originally.
CREATED_DATETIME	timestamp	DateTime	The date and time that the behavior was originally added.
MODIFIED_BY	varchar(255)	Text	The user who changed the behavior recently.
MODIFIED_DATETIME	timestamp	DateTime	The date and time that the behavior was recently changed.
BEHAVIOR_SUBTYPE_CODE	varchar(255)	Text	The code to determine the subtype of the task behavior.
CONFIGURATION_LEVEL_CODE	varchar(255)	Text	The code to determine the configuration level of the task. Valid values: `SYSTEM`, `TEMPLATE`, `PROCESS_SETUP`, `AD_HOC`.
ICON	varchar(50)	Text	The icon that displays in the task list to the end user.
COLOR	varchar(50)	Text	The color of the icon that displays in the task list to the end user.

See below for an example of what the data in the task behavior type table may look like.

TASK_BEHAVIOR_TYPE_ID	BEHAVIOR_TYPE_CODE	BEHAVIOR_DISPLAY_NAME	BEHAVIOR_SUBTYPE_CODE	CONFIGURATION_LEVEL_CODE	ICON	COLOR
1	CHECKBOX	Confirmation	CONFIRMATION	AD_HOC	check-square-o	#2C9F5A
2	DATA_ENTRY	Review	REVIEW	AD_HOC	thumbs-o-up	#2BAAD5
3	DATA_ENTRY	Attach Document	DOCUMENT_UPLOAD	AD_HOC	upload	#F96502
4	DATA_ENTRY	Process Setup	PROCESS_SETUP	SYSTEM	list-ul	#A82017
5	AUTOMATED	Consolidated Screening Check	CSL_CHECK	PROCESS_SETUP		
6	DATA_ENTRY	Consolidated Screening Results	CSL_RESULTS	SYSTEM	feed	#C73771

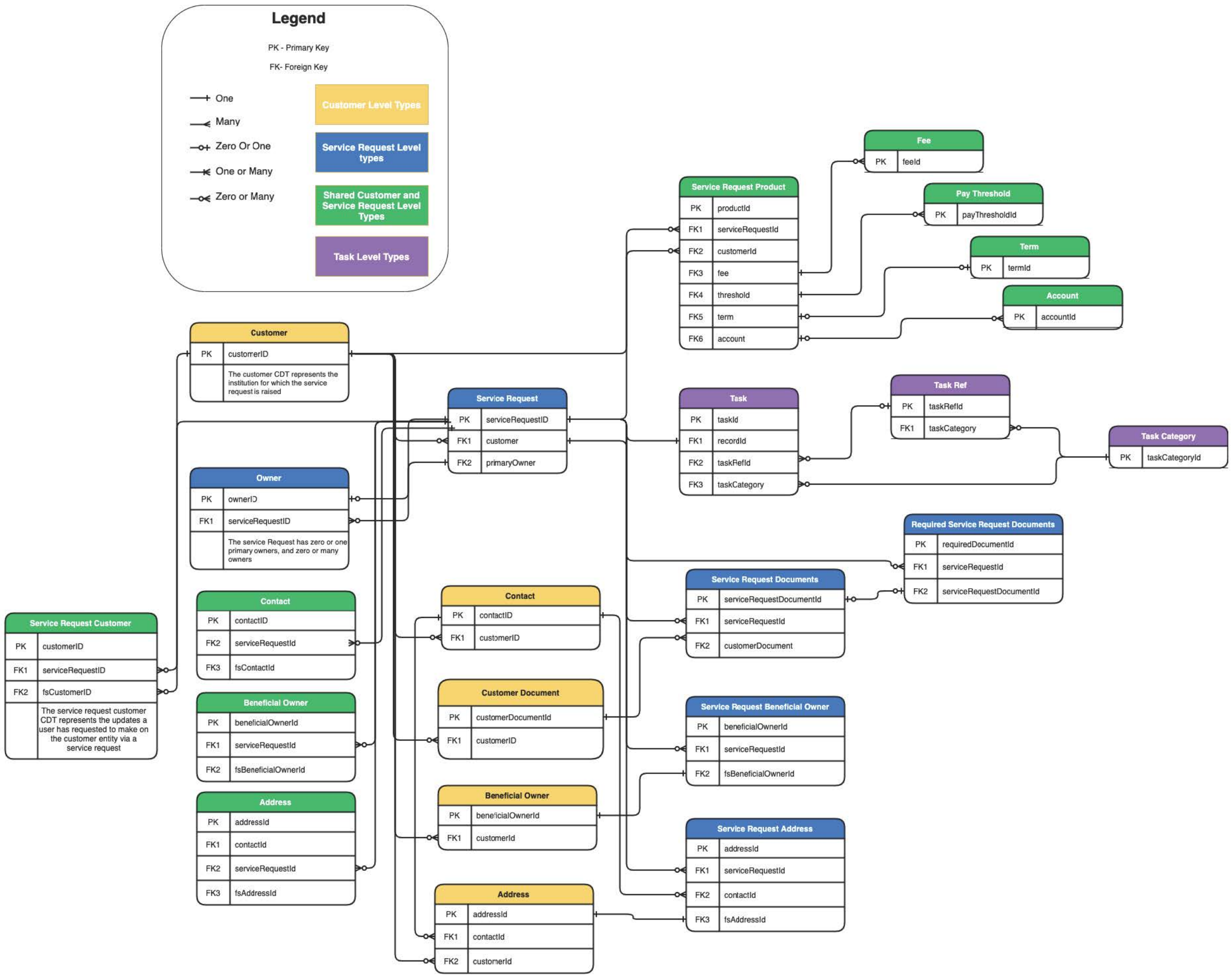
Data Relationships

Introduction

The primary custom data types and database entities in Connected Servicing are associated with customers, requests, and tasks. Understanding how these entities relate to each other can help you understand the way the data in the application works together.

The entity relationship diagram (ERD) on this page illustrates the main entities used in Connected Servicing and their relationships to each other.

Entity Relationship Diagram


Legend
PK - Primary Key
FK- Foreign Key
One
Many
Zero Or One
One or Many
Zero or Many
Customer Level Types
Service Request Level types
Shared Customer and Service Request Level Types
Task Level Types
Fee
PK feeId
Pay Threshold
PK payThresholdId
Term
PK termId
Account
PK accountId
Service Request Product
PK productId
FK1 serviceRequestId
FK2 customerId
FK3 fee
FK4 threshold
FK5 term
FK6 account
Customer
PK customerID
The customer CDT represents the institution for which the service request is raised
Service Request
PK serviceRequestID
FK1 customer
FK2 primaryOwner
Task
PK taskId
FK1 recordId
FK2 taskRefId
FK3 taskCategory
Task Ref
PK taskRefId
FK1 taskCategory
Task Category
PK taskCategoryId
Owner
PK ownerID
FK1 serviceRequestID
The service Request has zero or one primary owners, and zero or many owners
Required Service Request Documents
PK requiredDocumentId
FK1 serviceRequestId
FK2 serviceRequestDocumentId
Service Request Documents
PK serviceRequestDocumentId
FK1 serviceRequestId
FK2 customerDocument
Contact
PK contactID
FK2 serviceRequestId
FK3 fsContactId
Contact
PK contactID
FK1 customerID
Service Request Customer
PK customerID
FK1 serviceRequestID
FK2 fsCustomerID
The service request customer CDT represents the updates a user has requested to make on the customer entity via a service request
Beneficial Owner
PK beneficialOwnerId
FK1 serviceRequestId
FK2 fsBeneficialOwnerId
Customer Document
PK customerDocumentId
FK1 customerID
Service Request Beneficial Owner
PK beneficialOwnerId
FK1 serviceRequestId
FK2 fsBeneficialOwnerId
Address
PK addressId
FK1 contactId
FK2 serviceRequestId
FK3 fsAddressId
Beneficial Owner
PK beneficialOwnerId
FK1 customerId
Service Request Address
PK addressId
FK1 serviceRequestId
FK2 contactId
FK3 fsAddressId
Address
PK addressId
FK1 contactId
FK2 customerId