Have you ever wondered…..

- How am I going to make it easy for my customers to find what they need in our service catalog?
- Can I make the classifications different in the Portal, but still map correctly in the technician client?
- Do I have to do only an A to Z Service Catalog in the Portal?

The Answer is…….You have a lot of options.

Let's explore one of the possibilities together.

Cherwell Technician Classification Structure

Default Service Catalog in the Portal

Break Down the Service Catalog?

- Can we break the A to Z Service Catalog in smaller chunks or buckets?
  - Yes we can...it can be part of your portal design.
- Can we still have an A to Z Service Catalog?
  - Absolutely....in addition to the buckets
- Do the items (i.e. Service, Category, Subcategory) have to be the same in the Portal Action Catalog?
  - No! You can actually make them completely different and even group them differently?
- But won't that screw up how the Incident or Request comes in to the system?
  - Not at all. The Technician will see the proper classification and the data will be correct, but the customer will see something different in the portal.

How do we do this?

Presenting the Service Catalog in Chunks/Buckets

"Chunked Out" Action Catalog

What the Customer Sees

What the Technician Sees

A-Z Service Catalog Still Works
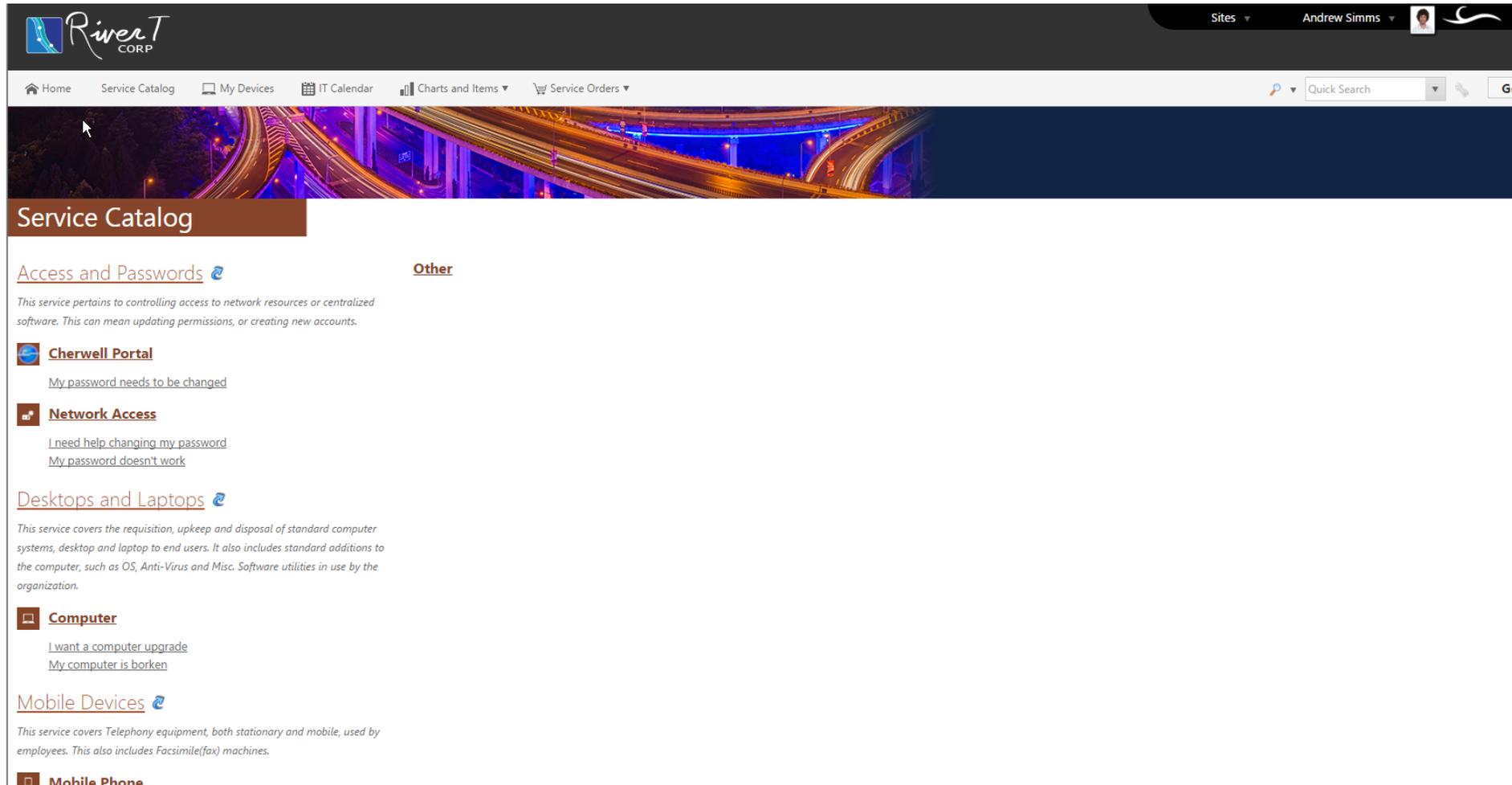
www.cherwell.com/conference   #CGC16

How Did We Do That?

- Changes to the Service, Category and Subcategory Tables
  - Add Portal Lookup Fields
- Adjust Action Catalogs to look at the new values
- Create Unique Action Catalogs for each of our "buckets"
- Added these values to be auto populated when the action is run
- Adjust Incident Portal View to Display these New Values

Let's take a look

Adapt Service Object

Adapt Incident Category Object

Adapt Incident Subcategory Object

Subcategory

Service:
Account Management ▼

Incident Type: ○ Incident ● Service Request

Category:
Cherwell Self Service ▼

Subcategory:
Change Password

Specifics Name:
Specifics - Generic ▼

Service Catalog Action to Run

[   ] [Choose]

Portal Service:
Access and Passwords ▼

Portal Category:
Cherwell Portal ▼

Portal Subcategory:
My password needs to be changed

Default Team:
1st Level Support ▼

Level 2 Escalation Team:
2nd Level Support ▼

Level 3 Escalation Team:
3rd Level Support ▼

Note: The Level 3 team defaults to the Service's OLA team.

☑ Visible in Customer Portal

Adjust Action Catalog Display Settings

Create Custom Action Catalogs for the "Buckets"

Auto populate Values

Adjust Portal Forms

Adjust Portal Forms

What We Are NOT Changing

- What we didn't change was the action catalog One Step to create the Incident. It is still:
    - Populating Service, Category and Subcategory (We simply auto populated our Portal Values)
    - It still is following any routing or other rules you have set (via the One Step or Auto Populate)

Another Example

Another Example

Things to Consider for the Portal

- Keeping the design clean, clean lines, flow, balance
- How are we drilling down?
  - To a new dashboard (like the first design) or directly to the action catalog (like second design)
- What information does the customer really need?
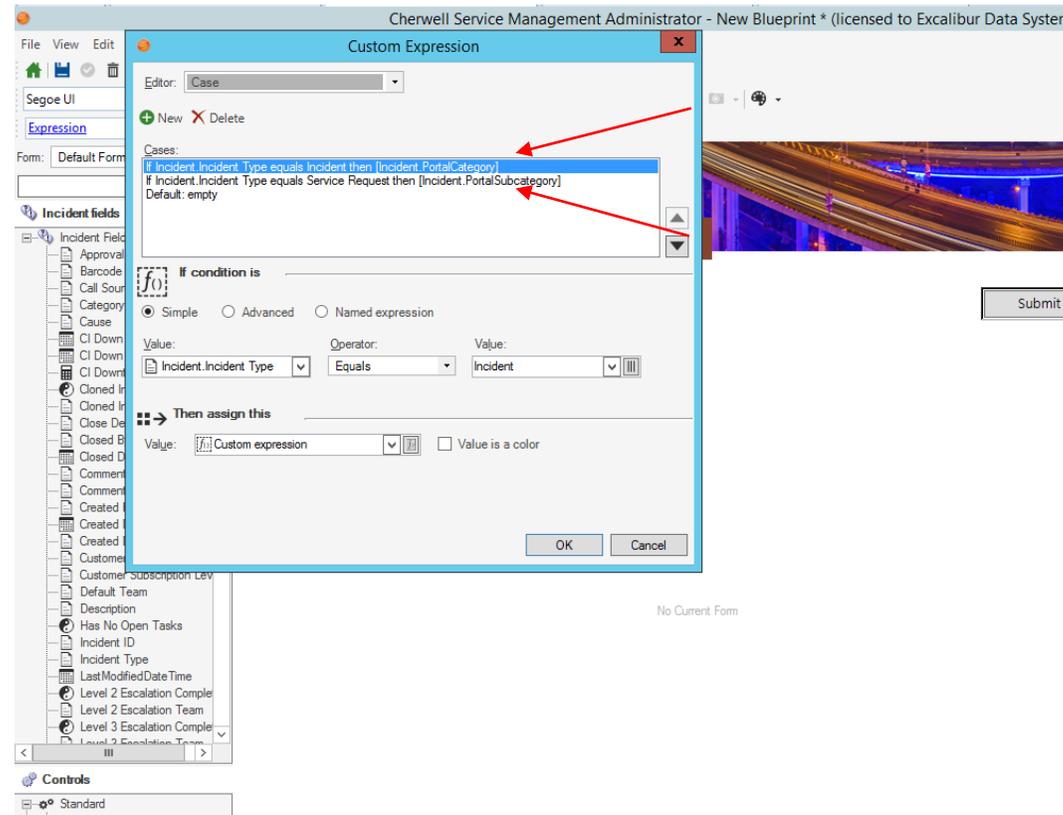- Do we want to drill down to other pages? Are there restrictions? Do we have the data to understand those restrictions?

Final Thoughts

- Providing a Service Catalog in the Customer's Language can be done, and it's pretty easy……..
- Because we are leveraging what is already there, we are getting the right data, routing and any other goodness you have added, but we have made it easy for the customer to find what they need and thereby tell us how we can help.
- The Customer Portal can be a great resource. Consider your options, consider your audience. If you build it well they will come…….