

SVMX101 Agenda

Course Introduction & Org Acquisition

- Acquire a ServiceMax Core Org for hands-on exercises
- Gain an understanding of real-life scenarios utilized throughout the course

Module 1: Introduction to Navigation & Setup

- Navigate the ServiceMax Core Setup menu
- Locate and utilize help resources

Module 2: Security, Users & Permissions

- Clone and Custom Salesforce and ServiceMax Core Configuration Profiles, Assign Users and ServiceMax Standard Permission Set
- Configure ServiceMax Core Org and Group Wide Settings
- Add a Custom Link to a Profile Home page

Module 3: Service Resource Architecture

- Identify where Resources fit into the ServiceMax Core data model
- Describe the various types of Resources used in the ServiceMax Core Application
- Configure and locate Resources
- Associate Resources with Expertise, Skills and Products

Module 4: Location Management

- Identify where Locations fit into the ServiceMax Core data model
- Describe the various types of Locations used in the ServiceMax Core Application
- Create Customer and Mobile Locations

Module 5: Installed Product Setup

- Identify where the Products and Installed Products fit into the ServiceMax Core data model
- Create Installed Product records at a Customer Location
- Configure a Default Installed Product Timeline View to Easily Identify Related Records
- Configure Installed Product Timeline Historical Time Range Settings

Module 6: Warranty Management

- Identify where Warranties fit into the ServiceMax Core Data Model
- Create a Warranty Terms Template and configure start dates
- Associate an Applicable Product with a Warranty Term
- Auto- and Manually-Generate a Product Warranty on an Installed Product
- Change Org- and Group-Wide Profile Settings

Module 7: Introduction to Entitlements

- Define Entitlements in ServiceMax Core
- Check Entitlements and Create Auto-Entitlement Rules
- Edit Page Layouts
- Understand the use of "Not Covered"
- Change Entitlement Settings
- Create a Service/Maintenance Contract
- Provide Coverages for Installed Products, Locations and Included Services

Module 8: Work Order Management

- Set up the Work Order Object for Use
- Create Page Layouts & Record Types
- Modify Fields & Mini Page Layouts
- Configure a Custom List View
- Create Work Orders from Installed Products
- Manually Check Entitlement on Work Orders
- Associate Parts, Expenses & Labor with a Work Order
- Generate a Service Report

Module 9: Service Flow Manager

- Understand the uses of SFM mappings and expressions
- Clone and customize a Standard SFM Transaction process
- Clone and Customize a Service Flow Wizard with Dynamic Sections
- Understand the use of Custom Actions and how to create them
- Review an existing Output Document SFM

Module 10: Field Change Order Management

- Configure FCO Batch Settings for FCO Search
- Create a Change Order (FCO Header) to Work Order Mapping for Use in an FCO Configuration Template
- Create An FCO Configuration Template with Mappings & Assign Permissions for the Purpose of Creating FCOs
- Create a Field Change Order and Generate Work Orders for a Recalled Installed Product as an End-user

Module 11: Experiencing the Dispatch Console

- Describe the benefits of using the Dispatch Console
- Identify where the Dispatch Console fits into the ServiceMax Core data model
- Search and navigate within the Dispatch Console
- Schedule Resources
- Create a Dispatch Console Custom List View

Module 12: Mobile Administration and Navigation

- Describe the benefits of using Mobile
- Improve sync efficiency by narrowing the scope of data using download criteria
- Provide users the appropriate mobile search, create and view permissions