

SVMX101 Virtual ILT Agenda

Day 1

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 create custom Salesforce and ServiceMax Configuration Profiles and assign users and ServiceMax Standard Permission Set
- Configure ServiceMax 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 data model
- Describe the various types of resources used in the ServiceMax Application
- Configure and locate resources
- Associate resources with expertise, skills and products

Module 4: Location Management

- Identify where locations fit into ServiceMax Core Data Model
- Describe the various types of locations used in the ServiceMax Application
- Create customer and mobile locations

Module 5: Installed Product Setup

- Identify where Products and Installed Products fit into the ServiceMax Core Data Model
- Create Installed Product records at a customer location
- Create and manage an installed base hierarchy on a Location record
- Configure a default timeline view

Day 2

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

Day 3

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 to create a step in a business process
- Clone a service flow wizard, add steps and assign permissions
- Understand the use of Custom Actions and how to create them
- Review an existing Output Document SFM

Day 4

Module 10: Field Change Order

- Configure FCO batch settings for FCO Search
- Create a change order (FCO Header) to Work Order mapping
- Create An FCO configuration template with mappings & assign permissions
- 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 Dispatch Console
- Identify where Dispatch Console fits into the ServiceMax Core Data Model
- Search and navigate within Dispatch Console
- Schedule resources

Day 5

Module 12: Mobile Administration and Navigation

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