

ServiceMax Asset 360 for Salesforce Field Service

Maximize Asset Performance & Differentiate with Service



Against the relentless march of digitization and changing customer expectations, service organizations across all industries must find new ways to operate in a safe and compliant manner while prioritizing the performance of their high-value, complex assets and the quality of their service experience. To achieve these goals, service delivery must become more efficient, prescriptive, and profitable.

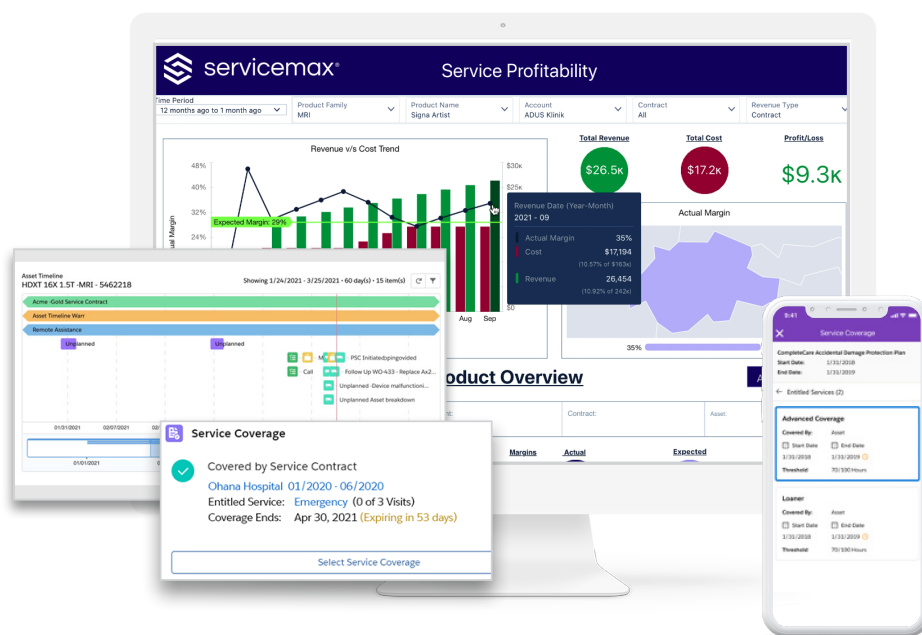
ServiceMax and Salesforce have joined forces to deliver an unparalleled solution that drives operational efficiency and uptime with a 360-degree view of assets on the world's #1 CRM platform.

Natively built on Salesforce Field Service, ServiceMax's Asset 360 solution delivers complete visibility into assets in the field so companies can maximize asset performance. Asset 360 adds deep asset-centric functionality and automation to the Salesforce platform - wrapped in a modern application layer where ServiceMax's industry expertise shines through.

Asset 360 for Salesforce is the choice for companies servicing and maintaining complex, high-value assets. By providing visibility to real-time service and asset data, Asset 360's customers can deliver operational excellence, drive strategic decisions and actions to grow revenue, and respond to market and regulatory shifts.

Bringing Together the Best of ServiceMax & Salesforce

- Extend Salesforce capabilities with asset-centric features, functionality, and automation on top of native Salesforce objects
- Built natively on Salesforce Field Service, no integration required
- Eliminate need for custom development with no-code configuration
- Developed on standard objects to take advantage of latest emerging technologies such as AI, Einstein, IoT
- Enterprise-grade security, compliance and governance from the world's #1 CRM



Product Highlights

- Prevent warranty & contract leakage at scale
- Maximize contract attach and renewal rates
- Accelerate time to value
- Improve sales and service interaction
- Improve operational efficiency
- Increase asset uptime
- Improve customer satisfaction
- Take advantage of significant innovations in every release

Key Capabilities

Boost Service Profitability

Entitlement Engine

Provides service teams with automated, rules-driven entitlement verification, upon creation of cases, work orders, and return orders. Helps prevent providing unwarranted free labor, parts, and loaners and ensures customer quotes include accurate service levels, pricing, and discounts.

Contract and Warranty Automation

Includes interactive features allowing service teams to select the best coverage option. Service thresholds alert service teams how much of the entitled services the customer has already consumed.

Contract Negotiated Pricing

Enables service teams to define and track granular pricing terms for individual assets, contracts, and services on top of the selected Pricebook. This ensures they apply the correct pricing terms to work orders and cases, thereby avoiding leakage and improving the billing process

Service Contract Plans

Provides a templated approach for creating individual service agreements more efficiently and accurately. Save multiple Service Contract Plans and combine them at the line item level.

Product Service Campaigns

Allows you to handle recalls, change orders, product modifications and upgrades, and run campaigns into your installed base with maximum efficiency. Quickly identify affected assets, and automatically generate work orders, return orders, opportunities, and more.

Out-Of-The-Box Reports

Equip you with instant insights on assets with warranties expiring, contract renewal insights, work orders completed within warranty period, contract attach rate, warranty conversion to service contract, and work orders covered/not covered by entitlement.

Service Contract APIs

Automate the creation of service contracts from a CPQ quote. Ensure that the services offered, coverage and pricing terms, and SLAs from the sales contract is accurately reflected in the service contract.

Smarter with Asset Data

Asset Hierarchy

Is a way for service organizations to organize assets in multi-level hierarchical views and benefit from complete installed base visibility. It enables service teams to view, search, track, update and manage equipment in real time on the platform and in the technician mobile app.

Asset Timeline

Delivers an at-a-glance, holistic view of past and future activities on an asset on an interactive visualization. It's available out of the box, across platform and mobile, and requires no further configuration.

Asset Service Coverage

Access entitlement information on the browser, in the field technician app, and in the customer portal. Help customer-facing team have more productive customer conversations, enable the on-site field technician to select the correct entitlement for work orders, and empowers customers to access coverage details via self-service.

Asset Technical Attributes

Consume data from IoT platforms, telemetry devices and sensor-based equipment in support of companies offering condition-based and time-based maintenance plans.

Returns/RMA Management

Is set up to handle a multitude of return scenarios and facilitate reverse logistics processes by automating and prescribing steps. Call center agents, technicians, and depot engineers can also track the affected assets at any given moment.

Depot Repair

Streamlines all related processes and comes with many packaged flows, such as advanced exchange, loaner management and different options for return-to-repair scenarios. All built-in flows can easily be configured to accommodate unique requirements.

Maintenance Plan Template

Eliminates the need to create individual plans for preventive maintenance from scratch. Using templates to automate the plan creation means it takes a lot less effort to create plans and accuracy is built in. This can be applied to both time-based and condition-based maintenance plans in Salesforce.

Service Analytics*

Get actionable insights from a package of Service Analytics dashboards showing comprehensive metrics such as Cost-to-Serve, Contract Profitability, Asset Attach Rates, and more.

Increase Service Agility

Service Process Manager

Is a no-code configuration tool for building and supporting any service process. Without relying on IT, it helps business administrators to easily create and modify workflows, regardless of their complexity. Service Process Manager (SPM) is not limited to asset-centric use cases. Whether there is a multi-step workflow required to open a case, assign a preferred technician to a work order, or account for timesheet entries, SPM assists in automating that process. Available within the Salesforce Flow framework, SPM is complementary to and enhances existing Salesforce Flows.

Best-Practice Flow Templates

Decrease implementation time by 30%.¹ Our templates leverage 30 years of combined CRM and field service expertise to deliver workflows for installed base management, stock management, returns, depot repair, work order management, mobile technician enablement, and more. For a rapid time to value, Asset 360 comes with more than 60 packaged best-practice process flow templates and transactions that are complimentary to Salesforce Flows.

Service Process Wizard

Assembles various workflow steps to drive the guided execution of business processes. The actions shown in the wizard are based on the context of where the user is in the Field Service process. The wizard can be also used both in the Customer and Partner Community

Transactions

Allow admins to quickly build and extend field service processes with standalone transactions. Transactions include configurable screens, object mappings, expressions and can be added to an existing Salesforce Flow to modify the process.

MuleSoft Asset 360 Connect

Accelerates the integration into your existing IT landscape with templates for common data flows

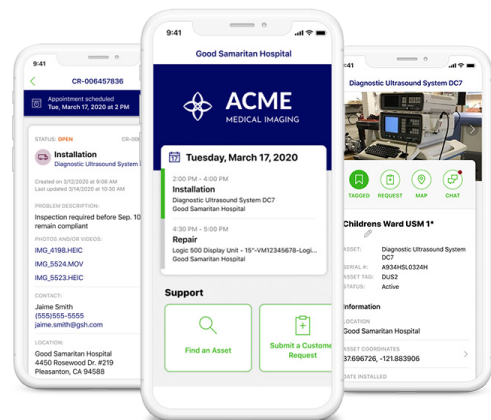
Mobile App Extensions

ServiceMax Engage

Put the power of asset data into the hands of your customers. Engage is a turnkey mobile app for end users and operators to view, manage, and request service for their assets.

Zinc Intelligent Remote Service

Enable your service teams to securely leverage organizational expertise for faster troubleshooting and instant help



ServiceMax Engage, the turnkey mobile app that connects your customers with your service teams

About PTC (NASDAQ: PTC)

PTC unleashes industrial innovation with award-winning, market-proven solutions that enable companies to differentiate their products and services, improve operational excellence, and increase workforce productivity. With PTC, and its partner ecosystem, manufacturers can capitalize on the promise of today's new technology to drive digital transformation.

