servicemax® asset 360

ASSET 360 FOR ADMINISTRATORS (A360ADM)

Pre-Work
- Complete the Before Beginning this Course module
- Acquire an Asset 360 Trail Org for hands-on exercises

Module 1: Setup, Navigation & Permissions
- Gain an understanding of real-life scenarios utilized throughout the course
- Provision a Trial Environment
- Navigate Asset 360 Items
- Assign Asset 360 Licenses & Permission Sets to Users

Module 2: Asset Management
- Review & Modify Asset Timeline Lightning Page Component Configurations
- Configure a Default Asset Timeline View With Configuration Groups
- Review & Modify Asset Hierarchy Lightning Page Component Configurations
- Configure A Default Asset Hierarchy View & Review Coverages & Notifications
- Install an Asset and Child Asset at a Customer Location
- Create a Technical Attribute Template Rule
- Create a Technical Attribute Template with Components
- Create a Technical Attribute User Group with Members & Attributes

Module 3: Warranty Management
- Review Warranty Management Settings
- Create A Warranty Term & Product Warranty Term & Set An Asset Qualifier To Auto-Generate a Warranty
- Manually Generate an Asset Warranty

Module 4: Maintenance Plan Templates & A360 Maintenance Plans
- Create a Maintenance Plan Process to Auto-Generate Work Orders on a Defined Schedule
- Create a Condition-Based Asset 360 Maintenance Plan Template with Applicable Products, a Work Rule Template and a Technical Attribute Template
- Create a Maintenance Plan from a Location using a Maintenance Plan Template

Module 5: Service Contract Plans & Service Contracts
- Create a Service Contract Plan with Subcomponents
- Create a Service Contract Using a Service Contract Plan
- Modify A Contract Status To Automatically Update Maintenance Plan Status
- Associate Multiple Service Contract Plans with a Service Contract

Module 6: Entitlement Engine
- Review & Modify Global Entitlement Settings
- Create A Work Order Auto-Entitlement Rule & stack rank When Multiple Coverages Are Found
- Configure Case Interactive Entitlement Settings
- Create an Entitled Service Assignment Rule Threshold on a Service Contract

Module 7: Service Process Manager
- Clone an SPM Transaction and Replace an SPM Transaction on a Wizard
- Create a Lookup Configuration In A Transaction Form Layout
- Add a Lookup Context to a Transaction Form Layout
- Enable Multi-Select of Lookup Child Records in a Transaction Form Layout
- Modify An Expression to Add a Condition
- Create an Expression with a Cross Object Reference
- Create an Expression to Dynamically Show or Hide a Form Layout Section
- Create a Mapping & Configure an Autofill Mapping
- Create a Mapping Using Current Record Header Literal
- Create an SPM Transaction To Add To a Wizard
- Add A Step Completion Indicator To A Wizard Step
- Create an SPM Transaction List view
- Check Configuration Usage of SPM Components
- Use the SPM Debug mode to Troubleshoot & Modify Transaction Components

Module 8: Product Service Campaigns
- Configure Product service Campaign Settings
- Create a PSC Configuration Template & Define Mappings
- Create a Product Service Campaign and Define Search Criteria & Delivery