servicemax® core

INTRODUCTION TO SERVICEMAX ADMINISTRATION (SVMX101) AGENDA

Pre-Work
- Complete the Before Beginning this Course module
- Acquire a ServiceMax Core Org for hands-on exercises

Module 1: Introduction to Navigation & Setup
- Navigate the ServiceMax Core Setup menu
- Locate and utilize help resources

Module 2: Security, Users & Permissions
- Create a ServiceMax Core Configuration Profile
- Configure ServiceMax Core Org and Group Wide Settings

Module 3: Service Resource Architecture
- Create Service Teams & Technicians and Assign Dispatchers
- Associate Expertise, Skills and Products with Resources

Module 4: Location Management
- Create an Account and Location
- Create a Mobile Location Associated with a Technician

Module 5: Installed Product Setup
- Create an Installed Product at a Customer Location
- Create and Manage an Installed Base Hierarchy on a Location
- Configure a Default Installed Product Timeline View

Module 6: Warranty Management
- Create a Warranty Terms Template
- Automatically Generate a Product Warranty
- Manually Generate a Product Warranty

Module 7: Introduction to Entitlements
- Perform Interactive (Manual) Entitlement
- Enable Auto Entitlement & Create an Auto Entitlement Rule

Module 8: Work Order Management
- Create Work Orders from Installed Products
- Manually Check Entitlement on Work Orders
- Manually Check Entitlement and Associate Parts, Expenses & Labor with a Work Order
- Generate a Service Report from a Work Order

Module 9: Service Flow Manager
- Clone and customize an SFM Transaction
- Clone a Service Flow Wizard, Add Steps and Assign Permissions
- Create and Test a Custom Action Transaction

Module 10: Field Change Order Management
- 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
- Create a Field Change Order and Generate Work Orders
- FCO Exercise Challenge

Module 11: Experiencing the Dispatch Console
- View & Configure Search Settings
- Schedule a Single Resource
- Schedule Multiple Resources
- Configure Color-Coded Badges for Work Order Counts

Module 12: Mobile Administration and Navigation
- Change a User Password for Mobile Testing Purposes
- Create a ServiceMax Group Profile for Mobile Permissions
- Assign SFM Mobile & App Permissions to a ServiceMax Group Profile
- Review Access to SFM Processes & Define Mobile Download Criteria
- Set Advanced Download Criteria
- Assign SFM Search Permissions to a ServiceMax Group Profile