

ADVANCED SERVICEMAX ADMINISTRATION (SVMX201) AGENDA

Pre-Work

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

Module 1: App Setup & Administration

- Information & Best Practices : Change Log & Revision Schedules, Package Installation & Upgrades, Help Documentation, Community
- Locate and utilize help resources

Module 2: Introduction to Service Plans

- Create Available Services
- Create Pricing Rules
- Create Activity Masters
- Create a ServiceMax Core Service Price Book
- Create Labor Pricing
- Create an SLA Terms Template for Service Maintenance Plans and Contracts
- Create a Service Plan Template
- Create Parts/Products and Salesforce Price Book Entries
- Create Parts Pricing
- Create Service Offerings on a Service Plan

Module 3: Service Maintenance Contracts

- Create an Installed Product for a Location
- Create a Service Maintenance Contract from a Service Maintenance Plan Template
- Use Interactive Entitlement to Manually Entitle a Work Order
- Allow Line-level Entitlement for Products Serviced
- Modify Auto-Entitlement Rule Settings
- Create an Auto-Entitlement Rule

Module 4: Preventive Maintenance Plans

- Create a Preventive Maintenance Plan Time-based Template
- Create a Time-based Preventive Maintenance Plan
- Create a Preventive Maintenance Process
- Create a PM Offering
- Enable Settings and Dynamically Add or Delete PM Plan Coverage When Updating Service Contract Coverage

Module 5: Get Price Functionality

- Information & Setup Prerequisites : Get Price Functionality
- Use Get Price Functionality to Set Advanced Pricing for:
 - Work Details (Such as Parts) Where a Warranty is Applicable
 - Work Details (Such as Parts) Where a Service Contract is Applicable
 - Work Details Where No Applicable Warranties or Service Contracts Exist

Module 6: Advanced Dispatch Console Configuration

- Create Event Hover Rules
- Create a Field Update to Allow Dispatch Console Users to Modify Data Within a Work Order Field While in a Calendar Event
- Create a Dispatch Console View
- Configure Map Hovers in the Dispatch Console
- Create Territory Match Rules
- Create an Immediate Dispatch Process
- Create a Skill and Associate With a Technician (Via Expertise)
- Create Technician Skill Match Rules
- Use Work Order Attributes to Create a Technician Eligibility Rule
- Use an Advanced Technician Search within the Dispatch Console
- Plot a Technician's Base and Current Location

Module 7: Advanced Service Flow Manager

- Create a Scheduled SFM
- Link Two SFM Processes
- Create an SFM Data Validation Rule
- Create a Context Filter to Narrow Lookup Field Results
- Create a Lookup Form-fill to Auto-populate Lookup Field Data
- Create a ServiceMax Core Advanced Filter
- Create an SFM Formula

Module 8: Inventory Management

- Stock and Serialize Products Within Locations
- Generate a Parts Request
- Receive and Record Consumption of Available Stock
- Make a Stock Adjustment
- Transfer Product/Parts Stock from one Location to Another
- Create an RMA Type of Parts Order from a Depot Repair Work Order
- Create and Process a Shipment RMA
- Process the Receipt of an RMA

Module 9: Migration Tool

- Review Migration Tool Access and Permissions
- Understand Pre-Migration Actions and using the Migration Tool