

salesforce



[Rate this page](#)

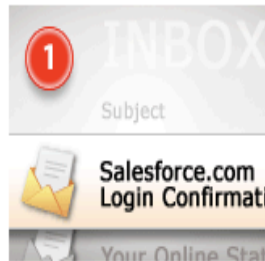
# Free 30-Day Trial of Professional Edition<sup>Plus</sup>

Full-Powered CRM Without Complexity

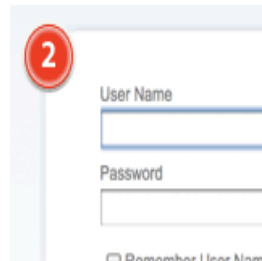


## Congratulations! Your Trial Account Is Ready

Check your in box for the first in a series of emails guiding you through your free 30-day trial to ensure that you experience everything that salesforce.com's on-demand solution offers.



Check Your Inbox



Login to Salesforce



Test Drive the App

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1. Go to: <http://www.servicemax.com/forms/titaniumtrial.php>
2. After hitting submit you should receive a screen like above (*if not try going back on your browser and trying again*)
3. An email will be sent to you from support@salesforce.com with your username & password
4. The trial can be accessed at: <https://login.salesforce.com/>

**ServiceMax Titanium** Search All... Search

1 Russ Thau Help & Training ServiceMax

Home Accounts Contacts Locations Service/Maintenance Contracts Installed Products Service Teams Work Orders Reports Dashboards +

ServiceMax Trial Days

Days Remaining: 30  
To activate your trial, please contact your ServiceMax Sales Representative or email [info@servicemax.com](mailto:info@servicemax.com)

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Training

[Getting Started](#)  
[Video on Break / Fix Process](#)  
[Using a Work Order](#)  
[Dispatch Reference Guide](#)  
[ServiceMax User Guide](#)

Create New...

5 Dispatch Console

Recent Items

No records to display

Russ Thau  
Tuesday November 2, 2010

Hide Chatter New!

What are you working on?

Attach File Link Share

WO-00000005 — Russ Thau created this work order.  
Today at 1:28 PM Comment Unfollow

WO-00000004 — Russ Thau created this work order.  
Today at 1:28 PM Comment Unfollow

Customer - Building A — Russ Thau created this location.  
Today at 1:28 PM Comment Unfollow

Show Older

Dashboard Refresh

Last refreshed at 11/2/2010 1:32 PM. Displaying data as Russ Thau.

Users Logged In

Work Order Throughput

Contracts Pending Renewal

3 Customize Page

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1. Here you can access your profile, setup, or logout click on your name
2. To learn more about Chatter click on your name
3. To change your dashboard selection follow the Customize Page link
4. This will keep you updated on how many days remaining in the trial
5. From this link you can create any new record

Russ Thau ▾

Help & Training

ServiceMax ▾

1

## Training

Getting Started

Video on Break / Fix Process

Dispatch Reference Guide

ServiceMax User Guide

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Customize Page | Edit Layout | Printable View | Help for this Page ?

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- There is persistent help throughout the application that can be found in the following ways:
  1. From the home screen you can access Help & Training on the Salesforce.com platform
  2. ServiceMax user guide can be found on the home screen as well under training on the left navigation
  3. To easily access help for the page you are on always look for the, “Help for this Page”

Home Accounts Contacts Locations Service/Maintenance Contracts Installed Products Service Teams Work Orders Reports Dashboards

1

Accounts Home Tell me more! | Help for this Page ?

View: All Accounts Go! Edit | Create New View

2

Go! All Accounts New Account ?

Create New View | Edit | Delete | Refresh A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Action	Account Name ↑	Billing State/Province	Phone	Type	Owner Alias
<input type="checkbox"/> Edit   Del	Acme	NY	(212) 555-5555	Prospect	RThau
<input type="checkbox"/> Edit   Del	Customer Account				RThau
<input type="checkbox"/> Edit   Del	Global Media	Ontario	(905) 555-1212	Prospect	RThau
<input type="checkbox"/> Edit   Del	ServiceMax	CA	(408) 748-6970	Customer	RThau

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1. Click on the Accounts tab
2. Click on the Go! Button to display All Accounts
3. Acme is going to be the Account we use as an example in this trial

Account **Acme** Customize Page | Edit Layout | Printable View | Help for this Page ?

1 Hide Chatter + Follow

Write something... Followers

Attach File Link Share

No updates to display.

2 « Back to List: Users

Installed Products [1] | Service/Maintenance Contracts [1] | Cases [3] | Work Orders [3] | Contacts [3] | Locations [1] | Parts Orders (Account) [0] | Open Activities [0] | Activity History [0]

**Installed Products** New Installed Product Installed Products Help ?

Action	Installed Product ID	Product	Date Ordered	Date Shipped	Date Installed	Status
<a href="#">Edit</a>   <a href="#">Del</a>	123456789	Widget	7/28/2010	8/27/2010	9/22/2010	Installed

4

Parent Account Website

Billing Address 10 Main Rd.  
New York, NY 31349  
USA

Preferred Technician Shipping Address 10 Main Rd.  
New York, NY 31349  
USA

▼ **Description Information**

Description

▼ **System Information**

Created By [Russ Thau](#), 9/27/2010 10:11 PM Last Modified By [Russ Thau](#), 9/27/2010 10:11 PM

[Edit](#) [Delete](#)

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- After clicking on the Acme Account you will be presented with the following screen.
- Within the Chatter area you can hide or unhide from this link.
  - By hovering over any of these items it will display the records associated. The number of records is represented by the [#]
  - You can change this screen by following this link.
  - Click on the Installed Product ID

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[Show Chatter](#) New! [Follow](#)

[« Back to List: Users](#)

[Product Warranty \[1\]](#) | [Service Contract Coverage \[1\]](#) | [Cases \[1\]](#) | [Work Orders \(Component\) \[4\]](#) | [Notes & Attachments \[0\]](#) | [Installed Product History \[5\]](#)

**Installed Product Detail**
Edit Delete Clone Validate Address Create Case Create Work Order

**▼ Installed Product Details**

Product ? <u>Widget</u>	Status ? Installed
Installed Product ID 123456789	Preferred Technician <u>Sample Technician</u>
Serial/Lot Number ? 123456789	

**▼ Customer Information**

Account ? <u>Acme</u>	Sales Order Number ? 9876
Contact ? <u>Jim Halpert</u>	Location ? <u>Location 1</u>

**▼ Key Dates**

Date Shipped ? 8/27/2010	Date Ordered ? 7/28/2010
Last Date Shipped ? 8/27/2010	Date Installed ? 9/22/2010

**▼ Location**

Access Hours <u>Default</u>	Street ? 2560 Mission College Blvd
Latitude ? 37.389991	City ? Santa Clara
Longitude ? -121.971875	State ? CA
	Zip ? 95054
	Country ? United States

- After clicking on Installed Product 123456789 you will get the following screen.
1. The core of ServiceMax revolves around this object.
  2. These buttons are how you will start your after-sales support process.
  3. These fields are tracked under the Installed Product History.
  4. Click on the Location 1

Show Chatter New!

Follow

[« Back to List: Users](#)[Installed Products \[1\]](#)[Work Orders \[0\]](#)[Product Stock \[1\]](#)[Notes & Attachments \[0\]](#)**Location Detail**[Edit](#)[Delete](#)[Clone](#)[Validate Address](#)[Create Work Order](#)

1

Location Name Location 1

Account ? [Customer Account](#)

Street ? street

Site Phone ?

City ?

Site Fax ?

State ?

Email ?

Country ? United States

Web site ?

Zip ? 94536

Service Engineer ?

**▼ Inventory Information**Stocking Location ? ☐

Inventory Account ?

Costed at value ? ☐**▼ System Information**Created By [Russ Thau](#), 9/27/2010 10:11 PM

Latitude ?


Last Modified By [Russ Thau](#), 9/27/2010 10:11 PM

Longitude ?

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- After clicking on the location, Location 1 you will be presented with the following screen
  - A location either represents the site of service, the location of the installed product, or a stocking/inventory balance like truck stock.
1. You can open a work order with the pertinent information from this screen.
  2. These fields represent the purpose of this location. For example stocking or inventory account and will handle inventory accordingly.

 Service Teams  
**Home**

View: All Service Teams Go! [Edit](#) | [Create New View](#)

---

**Recent Service Teams** New

No recent records. Click Go or select a view from the dropdown to display records.

1

2

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 All Service Teams New Service Team Change Owner

[Create New View](#) | [Edit](#) | [Delete](#) | [Refresh](#)

<input type="checkbox"/>	Action	Record Type ↑	Service Team Name	Email	Phone	City	State
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Equipment	<a href="#">Equipment</a>				
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Technician	<a href="#">Sample Service Team</a>			Santa Clara	CA

1. Click on the Service Teams tabs
2. After you press the Go! Button next to View: All Service Teams will be presented
3. Equipment can be resources or people
4. Technician are users of ServiceMax that can be scheduled to complete work orders through the dispatch console.





Tell me more about this Page ?

Enter keywords to find matching custom reports.



## Report Folders

Folder **ServiceMax Reports**  [Edit](#) | [Create New Folder](#)

- Unfiled Public Reports
- My Personal Custom Reports
- Account and Contact Reports
- Activity Reports
- Administrative Reports
- Call Center Reports
- Campaign Reports
- Google AdWords Reports
- Lead Reports
- Opportunity Reports
- Product and Asset Reports
- Sales Reports
- Self-Service Reports
- ServiceMax Reports**
- Support Reports

[Reorder Folders](#) | [Collapse All](#) | [Expand All](#)

<a href="#">Sales</a>	- How much business have I closed so far?
<a href="#">Sales</a>	- How much business have I closed so far?
<a href="#">Lead Source</a>	- How many leads has each lead source generated for me?
<a href="#">Lead Source</a>	- How many leads has each lead source generated for me?
<a href="#">Cases By Priority</a>	- How many open support cases do we have by priority?
<a href="#">Cases By Priority</a>	- How many open support cases do we have by priority?
<a href="#">Cases</a>	- What deals have not closed yet?
<a href="#">Cases</a>	- What deals have not closed yet?
<a href="#">Del   Export</a>	<a href="#">Sample Report: Pipeline By Close Month</a> - What Pipeline Do I Have By Close Month?

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1. Click on the Reports tab
2. Go to the folder and you can find the 50 canned reports under ServiceMax Reports
3. To create your own reports follow the the Create New Custom Report button

# Dashboard

## Sample Dashboard

« [Go to Dashboard List](#)

View Dashboard

[Edit](#) [Clone](#) [Refresh](#) ▼

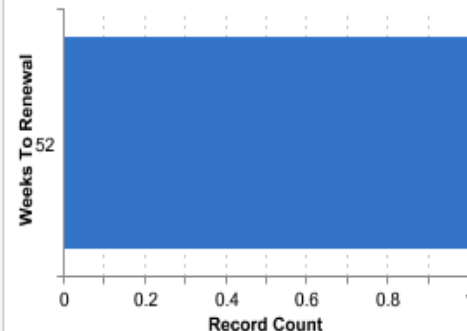
Users Logged In



Work Order Throughput



Contracts Pending Renewal



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1. Click on the Dashboards tab to get the following screen
2. You can create new dashboards by following this link.
3. The edit button will take you through an interactive tour on how to build dashboards.
4. The Refresh button allows you to update the current dashboards. The down arrow allows you to schedule updates and even send the updates via email.

## Administration Setup

- ▶ **Manage Users**
- ▶ Company Profile
- ▶ Security Controls
- ▶ Communication Templates
- ▶ Translation Workbench
- ▶ Data Management
- ▶ Monitoring
- ▶ Mobile Administration
- ▶ Desktop Administration
- ▶ Email Administration
- ▶ Google Apps

- Russ Thau ▾
- Help & Training
- ServiceMax ▾
- Report My Data
- +
- Setup
- System Log
- Logout

## Manage Users

- Users**
- Mass Email Users
- Roles
- Profiles
- Public Groups
- Queues
- Login History
- Training History

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New User Reset Password(s) Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/>   <a href="#">Edit</a>	Lawson, Charles	claws	titanium-customerportal@11trialforce.com		Customer Account Customer User	✓	ServiceMax Titanium Customer Portal User
<input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Login</a>	RThau, Russ	RThau	russ.thau@11trialforce.com	10/6/2010 2:22 PM	Corporate	✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Login</a>	User, Service	service	service@11trialforce.com		Corporate	✓	ServiceMax Titanium Service User

New User Reset Password(s) Add Multiple Users

- The above instructions allow you to log-in as a field technician to see a different view
- The setup can be found when clicking on your name at all times.