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/

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

2

**Russ Thau** ▾ | Help & Training | **ServiceMax** ▾ ①

**Training**

Getting Started
Video on Break / Fix Process
Dispatch Reference Guide
ServiceMax User Guide ②

Customize Page | Edit Layout | Printable View | Help for this Page ❓ ③

- 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

Accounts
**Home**

Tell me more! | Help for this Page

View: All Accounts ▾ Go! Edit | Create New View

All Accounts ▾ Go! 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 |
|--------|----------------|------------------------|-------|------|-------------|
| Edit | Del | Acme | NY | (212) 555-5555 | Prospect | RThau |
| Edit | Del | Customer Account | | | | RThau |
| Edit | Del | Global Media | Ontario | (905) 555-1212 | Prospect | RThau |
| Edit | Del | ServiceMax | CA | (408) 748-6970 | Customer | RThau |

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

4

**Account**
# Acme

**1**

**3**

Hide Chatter *New!* ⊕ Follow

Write something...

Attach 📋 File 🔗 Link          Share

**Followers**

No followers.

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 |
|--------|---------------------|---|---------|--------------|--------------|----------------|--------|
| Edit \| Del | 123456789 | **4** | Widget | 7/28/2010 | 8/27/2010 | 9/22/2010 | Installed |

**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

---

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

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**Installed Product**
# 123456789

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

📷 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 ]   **2**

▼ **Installed Product Details**   **3**

| | |
|---|---|
| Product ❓ Widget   **1** | Status ❓ Installed |
| Installed Product ID   123456789 | Preferred Technician   Sample Technician |
| Serial/Lot Number ❓ 123456789 | |

▼ **Customer Information**

| | |
|---|---|
| Account ❓ Acme | Sales Order Number ❓ 9876 |
| Contact ❓ Jim Halpert | Location ❓ Location 1   **4** |

▼ **Key Dates**

| | |
|---|---|
| Date Shipped ❓ 8/27/2010 | Date Ordered ❓ 7/28/2010 |
| Last Date Shipped ❓ 8/27/2010 | Date Installed ❓ 9/22/2010 |

▼ **Location**

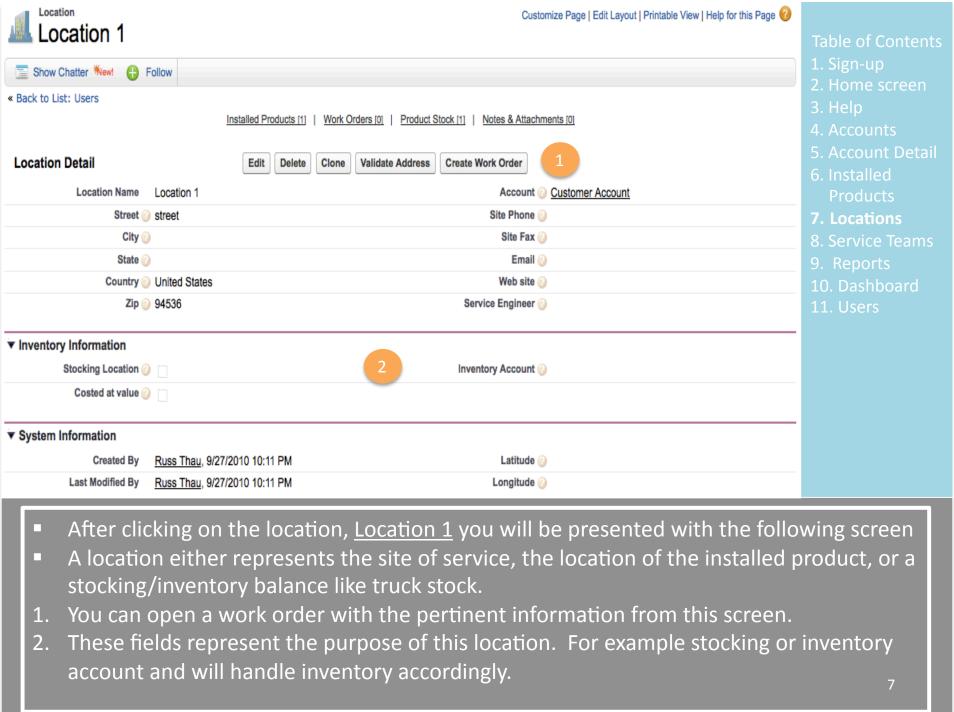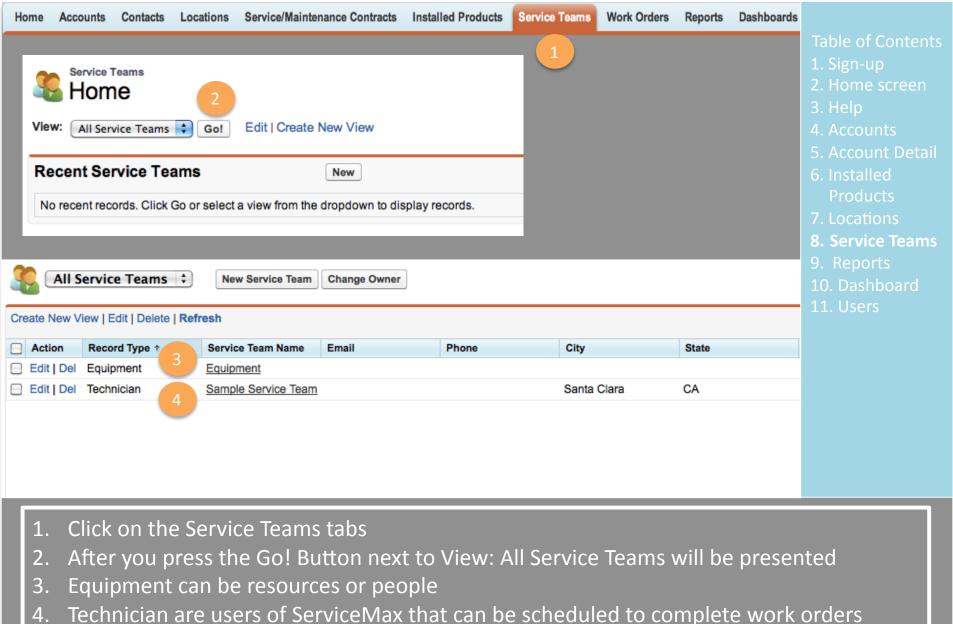| | |
|---|---|
| Access Hours   Default | Street ❓ 2560 Mission College Blvd |
| Latitude ❓ 37.389991 | City ❓ Santa Clara |
| Longitude ❓ -121.971875 | State ❓ CA |
| | Zip ❓ 95054 |
| | Country ❓ United States |

- 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

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Location
# Location 1

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

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**

**2**

| | |
|---|---|
| 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, <u>Location 1</u> 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.

7

**1**

**Service Teams**
# Home

**2**

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.

[All Service Teams ▼]   [New Service Team]   [Change Owner]

Create New View | Edit | Delete | **Refresh**

| ☐ | Action | Record Type ↑ | Service Team Name | Email | Phone | City | State |
|---|--------|---------------|-------------------|-------|-------|------|-------|
| ☐ | Edit \| Del | Equipment **3** | Equipment | | | | |
| ☐ | Edit \| Del | Technician **4** | Sample Service Team | | | 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.

8

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

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Dashboard
# Sample Dashboard

« Go to Dashboard List

**View Dashboard** [ Type here to search for a dashboard...  ▼ ]   [ Edit ]  [ Clone ]  [ Refresh ▼ ]

**Users Logged In**

Sum of Active

**Work Order Throughput**

Record Count

Order Status
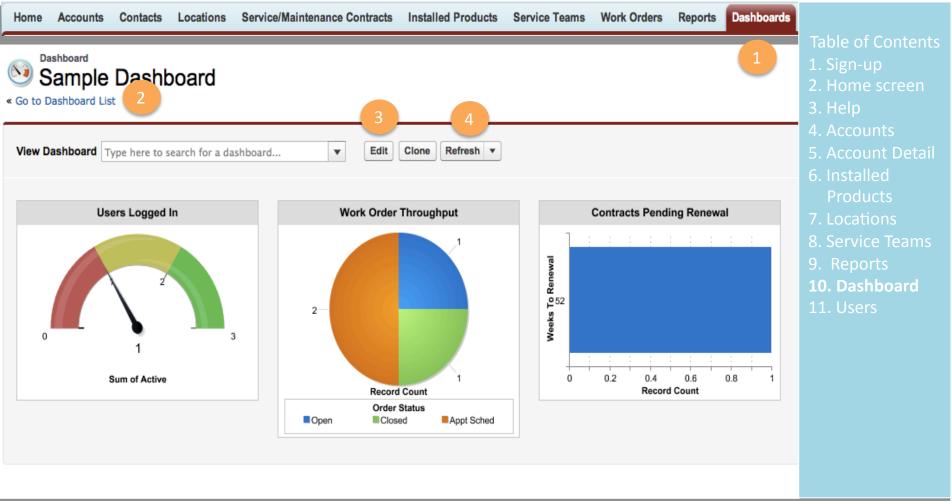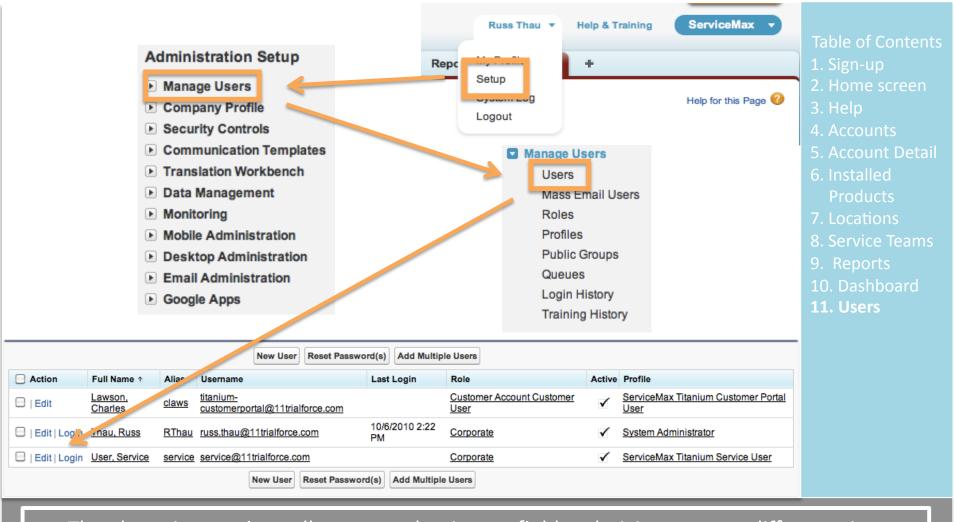■ Open   ■ Closed   ■ Appt Sched

**Contracts Pending Renewal**

Weeks To Renewal   52

Record Count

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.

10

## 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** ▾

My Profile
**Setup**
System Log
Logout

Help for this Page ?

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

New User    Reset Password(s)    Add Multiple Users

| ☐ | Action | Full Name ↑ | Alias | Username | Last Login | Role | Active | Profile |
|---|--------|-------------|-------|----------|------------|------|--------|---------|
| ☐ | Edit | Lawson, Charles | claws | titanium-customerportal@11trialforce.com | | Customer Account Customer User | ✓ | ServiceMax Titanium Customer Portal User |
| ☐ | Edit \| Login | Thau, Russ | RThau | russ.thau@11trialforce.com | 10/6/2010 2:22 PM | Corporate | ✓ | System Administrator |
| ☐ | Edit \| Login | 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.

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