



ServiceMax Release Notes

ServiceMax Spring '14 (March, 2014)

(Reposted 19th June, 2014)

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Note: Any unreleased features referenced in this release notes, other press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

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Revision History

Date	Change Description
4th Apr, 2014	First version.
8th May, 2014	<p>Added the following sections:</p> <ul style="list-style-type: none"> • Consider Salesforce Sharing Rules during Data Sync under ServiceMax Mobile for Laptops • Consider Salesforce Sharing Rules during Data Sync under ServiceMax Spring 14 for iPad • iOS 7.1.1 Compatibility under ServiceMax Spring 14 for iPad • ServiceMax Suite Issues Fixed in 14.20000.6 <p>Updated the section Spring '14 Upgrade Matrix</p> <p>Added the defect SMX011319 to the section ServiceMax Spring 14 for iPad Issues Fixed in this Release</p> <p>Updated the title of section ServiceMax Suite Issues Fixed in this Release to ServiceMax Suite Issues Fixed in 14.20000.3</p>
30th May, 2014	Added the section ServiceMax Suite Issues Fixed in 14.20000.16
19th Jun, 2014	<p>Updated the sections</p> <ul style="list-style-type: none"> • Dispatch Console Map Enhancements • Spring '14 Upgrade Matrix <p>Added the sections</p> <ul style="list-style-type: none"> • ServiceMax Suite Issues Fixed in 14.20000.20 • ServiceMax Mobile Issues Fixed in 14.20000.20 • Appendix with the following sub-sections <ul style="list-style-type: none"> • How to invoke Dispatch Console with JavaScript Map using Custom Link • How to invoke Dispatch Console with Flash Map using Custom Link

About ServiceMax Release Notes

This document provides a brief summary of new features, enhancements, modifications, and resolved issues in the ServiceMax Spring '14 release for the following ServiceMax applications: ServiceMax Suite, ServiceMax Offline Client, ServiceMax Mobile for Laptops, ServiceMax Spring 14 for iPad®, and ServiceMax Spring 14 for iPhone®.

Resources and Links

You can find out how to set up, upgrade, and use the ServiceMax Suite application at <http://userdocs.servicemax.com>.

Training and Webinars

ServiceMax offers extensive training and free monthly webinars for the ServiceMax Suite application. To sign up for webinars or to receive information about our training services, contact training@servicemax.com.

ServiceMax Suite

QuickBooks Export

QuickBooks™ is the accounting system of choice for mid-market customers of ServiceMax. Many of them need a quick and easy way to extract ServiceMax data & import into QuickBooks to eliminate duplicate data entry, without having to use a full-fledged middleware tool. The ServiceMax QuickBooks Export feature enables export of work orders that are ready to be billed, in IIF format, which is proprietary QuickBooks format. The exported data can be directly imported into QuickBooks for billing.

Following are the salient aspects of this feature:

- Provision to define the default org-wide export configuration in a JSON format string
- Sample default configuration provided out-of-the-box for cloning & customization
- Following options can be configured in JSON string:
 - Header & child objects to be exported, default being Work Order & Work Detail
 - Header & child object fields to export
 - Filter condition for qualifying header & child records
 - Date field to filter header records on
 - Header fields to display in the Export screen
 - Sort field (ascending order) for records displayed in the Export screen
 - Header object fields to update after export, e.g. to flag exported records
- The Export screen enables the user to achieve these:
 - Specify a date range on the configured header date field
 - View the qualifying header records in the above date range
 - Select all or any of these records for export
 - Export the selected records and their qualifying child records in IIF format file
 - Download the export file or email it to the logged in user

The JSON string is stored in **Export Configuration** field in **ServiceMax Processes** object record of Record Type **Export Configuration**. The record with **Is Default?** checkbox field checked is the one considered as the default export configuration.

Add the link to launch the **Export for QuickBooks** screen to the required home page layouts by including the custom component that contains the link **Data_Extract_Console**.

Reporting And Analytics Enhancements

24 new reports have been added to the set of existing preloaded reports in ServiceMax online application. The new reports include appropriate types of charts, mostly positioned at the top of the reports, for better utility. The reports include filters and default sort order based on the most common business scenarios.

The new reports are now grouped into multiple categories, with one new folder per category. The existing reports have been reorganized into the same categories, under the new folders. Some of the existing reports have been enhanced / renamed for consistent terminology.

Note: Technically, the existing reports in the new folders are actually new reports, but they have been created by cloning the existing reports. Some of the cloned reports have been enhanced / renamed. However, the old reports continue to exist in the ServiceMax Reports folder.

Some of the new reports have been added to an existing dashboard, replacing the old reports. However, these changes to dashboard are effective only in orgs where the Spring '14 release of ServiceMax package is installed newly, not in orgs where the ServiceMax package is upgraded from an older release.

Folder-wise List of New Reports

ServiceMax Finance Reports

- Work Order Amounts per Technician, Work Order Billing Information

ServiceMax Parts & Inventory Reports

- Pending RMAs

ServiceMax Productivity Reports

- Work Orders by Technician This Qtr
- Work Orders Closed Per Tech Last 7 Days, Work Orders Created Per Month

ServiceMax Warranty/Svc Contract Reports

- Active Service Contracts by Country, Active Service Contracts by SLA, Active Service Contracts by State, Warranties by Country, Warranties by State, Installed Products By State

- New Service Contracts by Month, New Warranties by Month
- Service Contract Expiration by Month, Service Contract Expiration Report, Warranty Expiration by Month, Warranty Expiration Report

ServiceMax Work Order Mgmt Reports

- Canceled Work Orders Per Month
- Open Work Order Matrix, Open Work Orders by Status & Type, Open Work Orders by Technician
- Unscheduled PM Work Orders, Upcoming PM Work Orders

Folder-wise List of Modified Reports

ServiceMax Parts & Inventory Reports

- Renamed: Consumption Trend by Partner (Quantity), Consumption Trend by Partner (Value)
- Renamed: RMA/Shipment Backlog for Partners
- Formula changed: Delayed RMAs, Parts Below Reorder Level

ServiceMax Productivity Reports

- Renamed: Work Order Throughput By Partner

ServiceMax Work Order Mgmt Reports

- Renamed: Open Work Orders By Type for Partners, Work Order Aging by Partner

Modified Dashboards

IB, Warranty & Service Contracts Dashboard

- Removed: Active Service Contracts, Contracts Pending Renewal
- Added: Active Service Contracts By SLA, Service Contract Expiration By Month

Scheduled SFM

Some business processes have transactions that need to be executed automatically for qualifying records, without any manual intervention. Examples of these are Service Contract renewals, creating work orders when RMA's are received, and creating shipments when a depot-repair work order is completed. Scheduled SFM feature enables automatic execution of SFM Transactions at defined intervals. This is useful when automatic execution is required for a large volume of records frequently.

Following are the salient aspects of this feature:

- A new configuration option named Scheduled SFM enables definition of schedules
- SCON Scheduler executes the defined schedules at hourly intervals
- A Scheduled SFM Process is a combination of one or more schedules for one or more SFM Transactions; multiple Scheduled SFM Processes can be defined
- An option is provided to invoke a process interactively to test configurations
- Only Source to Target (child only and header & child) and Standalone Edit type of SFM Transactions, which are *Complete*, are supported for scheduled execution
- Only SFM Transactions having header Qualifying Criteria are eligible to be scheduled
- SFM Mappings and Source Object Updates are supported
- A schedule can be defined for days of the week or dates of the month
- If the execution fails for any record, an error is captured for that record and execution continues with the next record
- After every execution of a Scheduled SFM Process, email notification is sent to the configured Salesforce User, with the following execution status summary:
 - Scheduled SFM Process Name & Id
 - Count of parent records, successes, & failures per SFM Transaction processed
 - Execution start and end time
- Name and status of individual records are included in a text file attached to the email
- If Enable Logging is configured, all the details of the notification, along with the attachment, are recorded in ServiceMax Job record of Type Scheduled SFM

SFM Designer Enhancements

The following usability enhancements have been implemented in SFM Designer:

- Qualifying Criteria and Mapping sections have been repositioned to be horizontal tabs, for more effective utilization of screen area
- Field and Value Maps show only the Mapped fields by default
- Option introduced to toggle between Mapped fields and All the fields

SFM Search Delivery Enhancements

SFM Search is now delivered with a new look and feel using UI based on HTML5.

Following are the salient aspects of this new UI:

- When an SFM Search is launched with no keywords, search results are not auto-loaded; Go button has to be clicked to load the results. However, search results are auto-loaded for keyword-based searches
- Search results can be viewed in horizontal tabs or vertical tabs, and icon is provided to quickly switch between these views
- Search results can be sorted dynamically on any column in ascending or descending order, by clicking the column title or using the column's drop-down menu options
- Search result columns can be hidden using the column's drop-down menu option Column – this selection is not persisted between invocations of search delivery
- By default, the first search result column is locked (frozen), but this lock can be removed or moved to another column for the duration of current invocation
- When a search result is selected by clicking the associated radio button, the applicable SFM Wizards are also delivered using HTML5 in the bottom panel
- Option to find the required SFM Search(es) by entering keyword(s) in the search box above the list of searches

Community Support

Following are the additional features which are now supported for Partner and Customer community users:

- Delivery of SFM Transactions of all types except Output Documents
- Stock Lookup feature
- All the custom Salesforce buttons and links included in the ServiceMax package

Dispatch Console Map Enhancements

We are making a technology change to the map in the Dispatch Console. This technology change will also come with some visual changes and enhancements as described in the following sections.

Why are we making this change? The current map in the Dispatch Console uses the Google Maps API for Flash. This API has been deprecated by Google and will stop working on September 2, 2014. We are therefore enhancing the map in the Dispatch Console to use the Google Maps JavaScript API as recommended by Google.

The ServiceMax Support Team will be contacting your organization to apply a patch to ensure you receive this upgrade and transition smoothly to our new Dispatch Console Map.

Starting with ServiceMax Suite version 14.20000.20, the new JavaScript-based Dispatch Console Map will be enabled by default when Dispatch Console is invoked from the home page link. You may continue to invoke the current Flash-based Map if desired. However, note that on September 2nd, it will no longer work when Google ends support of the underlying API. To invoke the current Flash-based Map, refer to the section [How to invoke Dispatch Console with the Flash Map](#) in Appendix.

Up to ServiceMax Suite version 14.20000.16, the JS Map is available in a pre-release mode and requires setup if Dispatch Console is invoked from home page link. To invoke Dispatch Console with the JS Map, refer to the section [How to invoke Dispatch Console with the JavaScript Map](#) in Appendix.

Note: Clicking the SFM wizard button 'Dispatch Technician' on Work Order launches Dispatch Console with JS Map in all the versions of Spring 14 release.

Note that as of version 14.20000.20, the new JavaScript Map has all the features that exist in the Flash Map, although the appearance may be different. Please refer to the differences section below for these details. However, for versions of 14.2000.16 and earlier, the new JavaScript Map does not have all the functionality that existed in the Flash Map. The limitations are listed in [Known Issues/Limitations](#) section, but it is recommended that you patch to the latest version to avoid these limitations.

Differences between Flash map and JavaScript map

Following is the list of key differences between the two maps:

- **Position of map and controls:**
 - Flash map is positioned in alignment with the Technician Tree / Gantt section.
 - JavaScript map is positioned in alignment with both the Work Order Grid and the Technician Tree / Gantt section.

- Zoom in and Zoom out controls (+ and -) are positioned at the top left of the map instead of at the bottom
- Map, Satellite, and Traffic buttons are positioned at the top right of the map instead of at the bottom
- Plot nearby selection grid that lists the Dispatch Console Views of Work Order, Account, and Location is displayed above the map instead of to the left of the map
- **Change in icons and controls:**
 - Radius value is displayed as an editable combo box, with values listed being 25, 50, 75, and 100, and with the option to type any other required value
 - Clicking the 'Map' button displays the checkbox option Terrain, instead of a button for Terrain overlay option
 - 'Plot nearby' icon is different
 - Technician's home location is represented by a new icon (Home icon instead of Flag icon), with the change in default value of configuration setting SET050. ServiceMax Configurator has to be run for the new icon to be set as the default value for the setting.
 - Location pin icon that indicates the center of the search area for Plot nearby is changed from Balloon to Green Arrow
 - The last hover pop-up remains open till it is explicitly closed by clicking the 'x' icon
 - The user setting 'Leave the date unchanged on map when technician selection changes' is always true (checkbox is checked and disabled) for JavaScript-based map

JavaScript Map Enhancements

The following enhancements are available only in the JavaScript map.

- **Personalization:**
 - Map width can be personalized by resizing the map and clicking Save Settings
 - Switching off the map can be persisted across sessions by clicking Save Settings; it can be switched on again either for the session or persistently
- **Team/Technician Search:**
 - Zooms to the first matching team/technician, when the search is performed without a work order

- Zooms to the selected work order, when the search is performed with a work order
- **Show Route:**
 - Each stop (work order) on the route is displayed with a sequential numbered icon starting from 1, for better visualization of technician's route
 - Routes of multiple technicians can be plotted, with up to 15 different colors to distinguish between the routes of different technicians
 - If a technician does not have any events, technician's home location is plotted
 - The sequential numbered icon and the technician route are plotted in the same color
 - Show Route Date control is now an editable text box
- **Map Hover:**
 - Configured hover field values are displayed on hovering over the relevant icons on the map
 - If no hover fields are configured:
 - Name and Address details are displayed for Work Order
 - Name is displayed for Account and Location
 - Name and Address details are displayed for Team and Technician
 - There is an option in the hover pop-up window to open the record in Salesforce
 - Work Order Number is displayed as a clickable link in the error-message dialog box launched from status bar. Clicking it opens the record in Salesforce.
 - Hover pop-up window is displayed for records returned by Show Route, Team/Technician Search, and Plot Nearby operations
- **Others:**
 - Map view state is maintained when switching between inline and pop-out maps
 - Traffic overlay option is included
 - Satellite overlay option displays checkbox option Labels, to show imagery with street names
 - ServiceMax Map Controls Action Bar is now displayed as a static bar, instead of as a floating bar that needs to be pinned; so pin icon is no longer needed and has been removed

ServiceMax *Linx* for ServicePower – Booking Windows (Pre-release)

ServicePower® Technologies provides cloud-based schedule optimization through optimized appointments including configurable time banded windows. It also supports on-demand technician job placement. ServiceMax *Linx* for ServicePower feature integrates ServiceMax with the ServicePower scheduling engine, for Work Order Booking Windows.

This feature integrates ServicePower's continuous optimization capability with the dispatch options available in ServiceMax, which include Dispatch Console, Immediate Dispatch, and OptiMax. The optimized schedules are delivered to the technician using the iPad Mobile App (ServiceMax Spring 14 for iPad).

Following are the salient aspects of this feature:

- When work orders are created, optimized schedules are automatically obtained from ServicePower for work orders, based on the qualifying criteria defined
- Get Appointments is a new screen for Work Order object displays the list of available appointment slots, to get on-demand appointments
 - Number of appointment slots to display for selection is configurable per ServiceMax Group Profile
 - The selected appointment is booked into ServicePower
- Any updates to Work Order schedule and status based on continuous optimization in ServicePower are updated in ServiceMax automatically every 15 minutes
- Only the optimized schedules from ServicePower can be configured to be drip-fed to the iPad Mobile App
- Any events created in the iPad Mobile App and synced to online must be flagged as drip-fed events in online (during implementation), for them to be synced back to iPad

ServiceMax Mobile for Laptops

Translation Workbench

ServiceMax Translation Workbench, introduced in Winter '14 release for ServiceMax Suite (online application), enables translation of end-user labels and messages defined in SFM Transactions, SFM Wizards, and SFM Searches. Prior to this feature, multi-language deployments required creation of duplicate implementations for each language. This adversely affected implementation complexity, costs, and maintainability.

From Spring 14 release, ServiceMax Mobile for Laptops application supports Translation Workbench. The scope of this feature for mobile includes support for the same set of languages as the online application. The translatable labels and messages supported in Laptop App are SFM Transaction name, description, qualifying criteria error message, data validation rule message, link process title, and page section title, SFM Wizard and Wizard step name, and SFM Search and Search Result title and description.



Translations defined for the online application will work in ServiceMax Mobile for Laptops application after configuration sync. There are no client-side configurations applicable.

Attachment & Sync UI Enhancements

Following is the list of enhancements related to Attachments support:

- Attachments tab now shows these file attributes: File Name, Modified (Last Modified Date Time), Size, Type, and Author
- Option to delete attachments is now available
- If the user tries to upload a file which exceed the maximum allowed size of 5 MB, user is prompted with an error message

Following is the list of enhancements in the Sync UI:

- When sync is in progress, the status bar at the bottom left shows Progress Indicator and status messages
- When the sync starts, sync icon changes from  to , and sync can be stopped by clicking the 'X' icon
 - When data sync is stopped and restarted, it resumes from where it was stopped
 - When config sync is stopped and restarted, it starts from the beginning, as configuration changes are rolled back on stopping

Multi-day Event Enhancements

- Context menu options 'Details' and 'Edit' are now available to view and edit multi-day events using SFM transaction screens, in both Day View and Week View
- Start and end time are displayed on the event in the calendar, for all the days the event spans

Consider Salesforce Sharing Rules during Data Sync

Salesforce Sharing Rules can now be optionally applied when downloading / uploading records to / from the Laptop Mobile App. To enable this option, the following group-wide configuration setting has been introduced:

Module: **ServiceMax iPad Client**

Submodule: **Synchronization**

Setting Id: **SET014**

Setting Name: **Apply sharing rules during data sync**

Default Value: **False**

To enable this feature, change the value of this setting to True for the applicable ServiceMax group-wide configuration profile and do a Reset App. This results in the following behaviour:

- Salesforce Sharing Rules are applied when downloading records matching Download Criteria and Advanced Download Criteria to the Laptop Mobile App. This is true for both initial sync and incremental sync.
- When a record is edited / created by the user in the Laptop Mobile App and synchronized to the server, sync will be successful only if the user has update/create permissions to the record based on Sharing Rules. Else, a sync error is returned, and user can clear the error by overwriting the local changes with the values from the server.

Note: This feature is available from ServiceMax Suite (online application) version 14.20000.6 only. After upgrading to this or higher version, ServiceMax Configurator has to be run. Then the setting mentioned above has to be set to True.

ServiceMax Spring 14 for iPad

Translation Workbench

ServiceMax Translation Workbench, introduced in the Winter '14 release of ServiceMax Suite (online application), enables translation of end-user labels and messages defined in SFM Transactions, SFM Wizards, and SFM Searches. Prior to this feature, multi-language deployments required creation of duplicate implementations for each language. This adversely affected implementation complexity, costs, and maintainability.

ServiceMax Spring 14 for iPad application supports Translation Workbench. The scope of this feature for mobile includes support for the same set of languages as the online application. The translatable labels and messages supported in iPad App are SFM Transaction name, description, qualifying criteria error message, data validation rule message, link process title, and page section title, SFM Wizard and Wizard step name, and SFM Search and Search Result title and description.

Translations defined for the online application will work in ServiceMax Spring 14 for iPad application after configuration sync. This feature does not have client-side configurations.

iPad Memory Optimization

Initial sync for complex implementations may not get completed in 512 MB RAM iPads due to insufficient memory. This is true for both iPad 2 and iPad Mini. With the optimization of memory handling in this release, initial sync gets completed successfully with both these supported iPads for complex implementations. iPad 1 has 256 MB RAM and is unsupported.

Configurable Signature Size

This enhancement to Smart Documents enables configuration of signature size in Output Documents Designer and rendering the signatures as per the configured size in the iPad Mobile App. This helps avoid issues such as broken signatures and signatures moved to a different page with fixed signature size. While configuring the signature size, valid values must be specified in the Output Documents Designer. If signature size is not specified, default values of 186px and 350px are considered for height and width respectively.

Data Purging

This feature enables purging of old records in the local database at regular intervals from the iPad App, to ensure that the database stores only the relevant data and does not keep growing in size, taking up space on the device. Till this release, the only way to purge old data from the app's local database was to do a Reset App.

How To Configure Data Purge Options:

The configuration options for this feature are available in the Mobile Configuration screen. There are two new options introduced in this release for this feature:

- **Purge data once every** option to configure the interval for scheduled data purge
 - Default value of this option is 168 hours (7 days)
 - If it is set to 0, user will not be prompted to purge data
- **Purge non-event window based data that is older than** option to define the criteria for old records downloaded through Download Criteria
 - Default value of this option is 10 days
 - If it is set to 0, it is taken as 1 day

The existing configuration option **Delete events and tasks older than** is used to delete events and their related records

How The Data Purge Works In iPad App:

- The iPad App prompts the user to start the data purge at the configured interval
- If the user chooses to continue, a check is made with the online app to see if the mobile configuration settings have been changed since the last config sync time
 - If there are no configuration changes, the old records are purged as per the event window configuration and the non-event window data configuration
 - If there are configuration changes, user is prompted to do a Configuration Sync first and then initiate Data Purge

Note: This is to ensure that the data retained and data deleted match the latest mobile configuration

- If the user cancels the data purge, user will be prompted again at the next scheduled purge time, which will be after the configured interval
- During data purge, the app displays the progress to the user
 - The app is locked when data purge is in progress
 - The app provides the option to cancel the purge till the progress is 80%
 - If cancelled, no data is purged

- Connectivity is required from the start till 80% progress during data sync; if there is no connectivity, data purge is not started or is aborted
- The app also provides an option to the user to manually initiate data purge from the Sync screen
- Data purge has a lower priority than event sync, data sync, and configuration sync, but higher priority than Attachments sync
 - If any other higher priority sync is in progress when data purge is due, data purge will start when user chooses to continue, only after the ongoing sync is completed
 - If any other higher priority sync starts when data purge is in progress (<80% progress), data purge is aborted and is restarted automatically after the other sync completes

Details Of Data Purged:

Events, Related Records, And Advanced Download Criteria Records

- When events are deleted, their related records will be deleted along with their child records and any attachments if one of the following conditions is met:
 - The related record objects and/or their child objects are not included in Download Criteria
 - The related records and/or their child records no longer meet the download criteria, and their last modified time is older than non-event window data option
- When events are purged, attachments of related records are also purged

Download Criteria And Other Records:

- If a header object record does not qualify for purging, its child object records do not get purged
- If a header object record is purged, its child object records are not purged automatically; they are purged independently, based on their last modified time
- Data purge happens also for objects which were originally included in Download Criteria configuration but are no longer included in that configuration
- Download On Demand (DOD) records are purged if both these conditions are met:
 - DOD timestamp is older than the non-event window data configuration
 - Last modified time of the DOD record is older than the non-event window data configuration

Consider Salesforce Sharing Rules during Data Sync

Salesforce Sharing Rules can now be optionally applied when downloading / uploading records to / from the iPad Mobile App. To enable this option, the following group-wide configuration setting has been introduced:

Module: **ServiceMax iPad Client**

Submodule: **Synchronization**

Setting Id: **SET014**

Setting Name: **Apply sharing rules during data sync**

Default Value: **False**

To enable this feature, change the value of this setting to True for the applicable ServiceMax group-wide configuration profile and do a Reset App. This results in the following behaviour:

- Salesforce Sharing Rules are applied when downloading records matching Download Criteria and Advanced Download Criteria to the iPad Mobile App. This is true for both initial sync and incremental sync.
- When a record is edited / created by the user in the iPad Mobile App and synchronized to the server, sync will be successful only if the user has update/create permissions to the record based on Sharing Rules. Else, a sync error is returned, and user can clear the error by overwriting the local changes with the values from the server.

Note: This feature is available from ServiceMax Suite (online application) version 14.20000.6 only. After upgrading to this or higher version, ServiceMax Configurator has to be run. Then the setting mentioned above has to be set to True.

iOS 7.1.1 Compatibility

ServiceMax Spring 14 for iPad application is compatible with iOS version 7.1.1.

New App: ServiceMax Spring 14 for iPhone

Overview

With the release of the new app ServiceMax Spring 14 for iPhone, ServiceMax support for Smart Phones is now being introduced, starting with iPhones. As the app icon implies, this is a “lite” application, that includes some key mobile features. This is a fully native iOS app, which is supported on iPhones with iOS versions 7 and above.

Key Features

Initial Sync:

- Download configuration such as SFM View Transactions (read only)
- Download events in the configured window with related records and their child records
- Download data as per Download Criteria and Advanced Download Criteria

Calendar View with Day View and Month View:

- Month View highlights days that have events
- High Priority events highlighted with a flag icon
- Any Work Order with SLA highlighted with a clock icon
- Event shows Work Order Account's name and start time
- Event subject displayed for non-Work Order events only

Viewing Records And Related Functionality:

- Header sections and child sections can be viewed individually
- Drilling down to related records from lookup fields possible
- Summary option displaying key details available for Work Order object
- From Summary Contact, SMS and Phone Options supported using native iOS features
- From Summary, show route between technician's current location and Work Order's location is possible through native Apple Map support

Rescheduling of Events:

- Enabled through dragging and dropping of events in Day View
- The event start time can be edited; but duration cannot be edited

Incremental Sync:

- Aggressive Event Sync triggered on event edit

- Manual Data Sync to get events, related data, and download criteria data

List of options available from Tools:

- Sign out
- Option to trigger Data Sync manually
- Reset App
- Data Sync Status & Last Sync Time display
- Display of App Version Info and Logged In User Info

Server Configuration

Server configuration for iPhone App is similar to that for iPad App, and is achieved using Mobile Configuration screen. iPhone App requires ServiceMax server package Spring '14 or higher. For this release, following are the configuration options applicable to iPhone App:

- Download Criteria
- Advanced Download Criteria
- Synchronization Settings:
 - Retrieve events and tasks for the next (Only Events are supported)
 - Delete events and tasks older than (Only Events are supported)
 - When there are data synchronization conflicts (Online Takes Precedence and Mobile Takes Precedence options only)

Client Configuration

The device settings supported are Login Host and Request Timeout (In Minutes). Login Host is for selection of org type, which can be Production, Sandbox, or Custom Host with an associated URL. Its default value is Production. Request Timeout allows a value between 3 (default) and 10 minutes, and can be increased when there are frequent timeout errors.

Spring '14 Upgrade Matrix

The Spring '14 Update Matrix table shown below identifies which product features require setup and which features are automatically visible to all end users.

Feature	Product	Automatically visible to all users. No setup required.	Feature is available but requires some setup.
QuickBooks Export	ServiceMax Suite		✓
Reporting & Analytics Enhancements	ServiceMax Suite	✓	
Scheduled SFM	ServiceMax Suite		✓
SFM Designer Enhancements	ServiceMax Suite	✓	
SFM Search Delivery Enhancements	ServiceMax Suite	✓	
Community Support for SFM, Stock Lookup, and Buttons & Links	ServiceMax Suite	✓	
Dispatch Console Map Enhancements	ServiceMax Suite (up to 14.20000.16)		✓
Dispatch Console Map Enhancements	ServiceMax Suite (from 14.20000.20)	✓	
Translation Workbench	ServiceMax Mobile for Laptops		✓
Attachment & Sync UI Enhancements	ServiceMax Mobile for Laptops	✓	
Multi-day Event Enhancements	ServiceMax Mobile for Laptops	✓	
Consider Salesforce Sharing Rules during Data Sync	ServiceMax Mobile for Laptops		✓
Translation Workbench	ServiceMax Spring 14 for iPad		✓

Feature	Product	Automatically visible to all users. No setup required.	Feature is available but requires some setup.
iPad Memory Optimization	ServiceMax Spring 14 for iPad	<input checked="" type="checkbox"/>	
Configurable Signature Size	ServiceMax Spring 14 for iPad		<input checked="" type="checkbox"/>
Data Purging	ServiceMax Spring 14 for iPad		<input checked="" type="checkbox"/>
Consider Salesforce Sharing Rules during Data Sync	ServiceMax Spring 14 for iPad		<input checked="" type="checkbox"/>
iOS 7.1.1 Compatibility	ServiceMax Spring 14 for iPad	<input checked="" type="checkbox"/>	

ServiceMax Suite Issues Fixed in 14.20000.3

Defect Number	Description
SMX005306	'Attempt to de-reference a null object ' error appears on trying to edit an Offline Profile which includes dataset(s) for deleted object(s).
SMX008573	When the child object has two master-detail relationships, it is not possible to create child records from SFM Delivery. Because, the second Master-Detail field is locked and cannot be set to the required value.
SMX007730	On Quick Save, updates made to the header fields are overwritten with values configured in the value map. Depending on the updates, the header record cannot be edited further, due to reapplication of qualifying criteria
SMX010262	<p>SFM Delivery fails with 'Undefined' error for some SFM transactions in scenarios such as adding a new line. This issue gets resolved if a clone of the failing SFM transaction is created and used.</p> <p>Note: To apply the fix for this issue, follow these steps:</p> <ul style="list-style-type: none"> • Open the failing SFM transaction in SFM Designer. • Follow the prompts to save the automatically updated transaction. • Or, check and update the page layout and target child associations and save the transaction. • Launch the SFM transaction in SFM Delivery and clear the ServiceMax Cache.
SMX010513	<p>If an object has fields in another managed package to which logged in user doesn't have license, SFM transaction on that object fails to load in SFM Designer.</p> <p>Note: With this fix, an error message is displayed indicating that the logged in user does not have access to fields in the source / target object of the SFM transaction.</p> <p>It is recommended that user remove access to the logged in user for fields from the other managed package, or get license to the required package, before viewing / editing / creating SFM transactions on such objects.</p>
SMX010653	Custom SFM Transactions with multiple child tabs and source object updates sometimes fail on Save, with the error 'SVMXC:Too many SOQL queries: 101'.

Defect Number	Description
SMX010779	Lookup search window opens, even when SET001 is set to true, and the search returns only one record. SET001: Auto-populate lookup field if lookup search returns only one record, under module SFM Transaction Manager and submodule SFM Transaction Delivery Engine.
SMX011074	When the user does not have access to one of the fields included in the SFM page layout for a target child object, clicking the Update button in the Extended Edit dialog box does not save the entered values and does not close the dialog box.
SMX011158	In the interactive Entitlement screens for Case and Work Order, it is not possible to select a Warranty or Service Contract, if the user does not have 'Edit' permission on Product Warranty and Service/Maintenance Contract objects.
SMX011166	<p>SFM Designer freezes on clicking the Source Object Updates tab for specific SFM transactions for some users.</p> <p>This happens if a field from another managed package is included in the SFM transaction definition in Source Object Updates, and the logged in user does not have license to that managed package.</p> <p>Note: With this fix, an error message is displayed indicating that the logged in user does not have access to one or more fields in Source Object Updates.</p> <p>It is recommended that user get the license to the required package before viewing / editing such SFM transactions.</p>
SMX011313	Scale is not being respected when a Currency field is displayed in SFM Delivery.
SMX011322	In Territory Console, some child territories are not displayed when multiple levels of child territories are created
SMX011354	<p>On Dispatch Console Map, Google copyright information gets jumbled when the map is resized, sometimes overlapping the events displayed in Gantt. Such events cannot be opened for editing.</p> <p>Note: With this fix, controls to switch the map type such as Satellite and Traffic are displayed only when the size of the map is sufficient. Otherwise, only zoom controls are displayed, along with the Google copyright information.</p>

ServiceMax Suite Issues Fixed in 14.20000.6

Defect Number	Description
SMX011927	<p>When non-Work Order events are created from Dispatch Console, event end date is set to incorrect value in this scenario: Event start date time and default event duration as determined by the value of group configuration setting SET002 are such that the event end date is different from the start date.</p> <p>For instance, if the event start date time is 30th April 2014 3:00 PM and the default event duration is 1440 minutes, end date time is set to 30th April 2014 3:00 PM instead of 1st May 2014 3:00 PM.</p>
SMX011930	<p>In Dispatch Console Expanded Event Edit window, all the configured fields are not displayed in this scenario: When a Date field is configured in the Dispatch Console Field Updates configuration screen, and that field has a non-null value.</p> <p>In this scenario, the fields configured below the Date field are not displayed, event subject is not auto-populated, and Event section fields and controls related to Duration and Work Order re-assignment are not displayed.</p>
SMX012155	<p>When a Linked SFM Process is launched, it does not work as expected. The current page is saved and the next page is loaded, but the page is not accessible due to the constant spinning logo.</p>

ServiceMax Suite Issues Fixed in 14.20000.16

Defect Number	Description
SMX012368	<p>Values of date time fields get changed for some records on save in SFM Delivery. This happens for SFM Transactions that have two or more child tabs, when new records are added and/or there are existing records in more than one tab.</p>
SMX012231	<p>HTML5-based SFM Search Delivery does not load in browsers (IE, Google Chrome, and Firefox).</p>

ServiceMax Suite Issues Fixed in 14.20000.20

Defect Number	Description
SMX011961	Incorrect values are saved for datetime fields displayed in the Expanded Event Edit window. The saved values change every time an event is edited. This happens if the time zone is changed by clicking the Globe icon and launching the Choose Time Zone dialog box. This is true for datetime fields in both Work Order and Event objects.
SMX012573	It is possible to double book a technician in Dispatch Console if the start and end date of the event are exactly the same as an existing event. This happens even when all the related configuration settings are set to disallow double booking.
SMX012645	Dispatch Console with JS Map does not display double byte characters (e.g. Chinese) in fields for users using English language.

ServiceMax Mobile Issues Fixed in 14.20000.20

Defect Number	Description
SMX011978	After Salesforce platform upgrade to Spring 14, iPad initial sync hangs at 66% because of long running SOQL queries/timeout with Internal Server Error. This happens for objects that have more than 100k records. This fix applies to Laptop Mobile app also.

ServiceMax Spring 14 for iPad Issues Fixed in this Release

Defect Number	Description
SMX007460	Picklist field value is blank in iPad Mobile App when set to an undefined value, though Salesforce screen shows this value in browser.
SMX011061	When an SFM Search contains an expression on a picklist field with Equals or Not Equals operator and 2 or more comma-separated values, tapping on that search in the iPad Mobile App results in Application Error. The error message is 'near "Limit": syntax error'. Sample expression that fails is 'Order Status Not Equals Closed,Canceled,Canceled'.

Defect Number	Description
SMX011093	If there is a single quote (') in the value of any field included in a Smart Document, signature is broken
SMX011152	With 'Include Online Results' option enabled, SFM Search fails inconsistently. The error message 'No view process available for the logged in user' is displayed or the results have blank values.
SMX011319	<p>When there are more than 25 lookup fields accessible to the iPad Mobile App user's profile, lookup fields display Salesforce Ids instead of Name field values, unless the related records are downloaded through Download Criteria.</p> <p>Note: The fix for this increases the limit to 35 lookup fields. This is a Salesforce limit. If there are more than 35 lookup fields, standard and custom, and it is required to display the Name field value for all the required fields, do the following:</p> <p>Restrict the field level access for the iPad user's profile to only the required lookup fields (maximum limit: 35).</p> <p>Set SET008 (Skip inaccessible fields, ServiceMax iPad Client Synchronization) to True.</p>
SMX011427	Data sync takes longer time in an org with multiple currencies, if Advanced Get Price is enabled. This happens when there are no PricebookEntry records for each supported currency in the applicable Price Books.
SMX011589	SFM Expressions defined with condition 'Is Not Null' are not evaluated properly for Smart Documents in the iPad Mobile App.
SMX011302	Initial Sync for iPad app hangs at 24%. This happens in sandbox orgs upgraded to Salesforce Spring14 release.

ServiceMax Mobile for Laptops Issues Fixed in this Release

Defect Number	Description
SMX010759	When only one SFM Search is assigned to Laptop Mobile App user's ServiceMax Group Profile, it is not displayed in the app.
SMX011074	When the user does not have access to one of the fields included in the SFM page layout for a target child object, clicking the Update button in the Extended Edit dialog box does not save the entered values and does not close the dialog box.

ServiceMax Offline Client Issues Fixed in this Release

Defect Number	Description
SMX011329	When loading data from CSV files, file existence and readability are not checked for all the files at the beginning of the sync process. For example, if there are 3 CSV files and if there is an issue reading the third file, sync fails only after downloading all the configuration data such as dataset definition, object & field definition, and page layout definition and after fully processing the first 2 files.
SMX011560	During the sync from offline to online, the number of new and updated records submitted and the IDs of the records submitted are not recorded per object in the Application Log file. This information is required for knowing the sync status and troubleshooting.
SMX011561	<p>With a custom solution in online where there is dependency on the order in which records of different objects are inserted or updated from offline to online, sync needs to be done twice manually, to avoid sync errors and data integrity issues.</p> <p>Note: The fix involves automatic retrying of failed sync once, which is transparent to the end-user. This fix can be turned on by setting the new client configuration option 'Auto-Retry Sync For Failed Updates' under My Settings tab to True.</p>
SMX011575	<p>When there are many lookup fields in a page layout, loading of the page takes longer.</p> <p>Note: The fix involves removing the pre-loading of lookup search data when</p>

Defect Number	Description
	the page is loaded, and doing this loading when the lookup search window is opened. This loads the page faster, because only the lookup field value is displayed when the page loads. This functionality can be achieved by setting the new client configuration option 'Load lookups on page load' under My Settings tab to False.
SMX011790	<p>When more than 25 Installed Product records are created locally and sync is initiated, sync error 'System.Limit Exception: Too many DML rows:10001' is thrown and the sync fails. There is no option to sync fewer records at a time to avoid Salesforce governor limits such as these.</p> <p>Note: The fix introduces a new client configuration option 'Sync Batch Size' under My Settings tab, with the default and maximum value of 200 and minimum value of 1. When the above exception is encountered, this batch size can be reduced and then sync can be restarted. This can be repeated till the sync succeeds.</p>

Known Issues/Limitations in ServiceMax Suite

Community Support

- In SFM Search Delivery, clicking a hyperlink in the results pane or an SFM Wizard button in the SFM Wizard pane redirects to login page

Internet Explorer 11 Support

The following features do not work as expected with Internet Explorer 11 (IE 11) browser. Workaround is to set Document Mode to IE 10 in the IE 11 browser.

Configuration screens invoked from ServiceMax Setup home page:

- Counter Rules
- MTTs Rules, Territory Match Rules, Dispatch Processes
- Event Hover Rules, Event Subject Rules, Dispatch Console Views
- Technician Eligibility Rules, Skill Match Rules
- SFM Wizards (Designer)
- SLA terms, Auto Entitlement Rules – Work Order

End user screens:

- SFM Wizard Delivery

Reporting And Analytics Enhancements

There are no reports in the new folder ServiceMax Product Quality Reports.

QuickBooks Export

- The Export Configuration has to be specified manually in JSON format; there is no configuration screen for this
- Only one active Export Configuration is supported per org
- No data validations are done before creating the IIF format file

Scheduled SFM

- All UI-based features such as SFM Data Validation Rules, Lookup Form-Fill, Required-Field check, etc. are not supported
- Apex and JS web service calls are not supported

- Multi-source process and Linked SFM process are not supported

SFM Search Delivery

- Context-sensitive menus do not work

Dispatch Console Map Enhancements

- Plot nearby Work Orders / Accounts / Locations: In JavaScript map, it is not possible to change the search location by clicking within the radius area displayed. This applies to both Plot nearby radius area and Tech/Team Search radius area. Workaround is to clear the map, choose the search location, and plot again.
- Flex Map features NOT implemented in JavaScript Map up to version 14.20000.16:
 - Plotting Dispatch Console Views for Work Order, Location, and Account
 - The functionality related to Radius

ServiceMax *Linx* for ServicePower – Booking Windows

- Getting additional appointments is not supported
- Rebooking appointments is not supported
- Switching between an appointment and automatic scheduling is not supported
- Force booking jobs (when no appointments are available) is not supported

Known Issues/Limitations in ServiceMax Spring 14 for iPad

Data Purging

- When events are deleted, related Advanced Download Criteria object records are not deleted, except for attachments

SFM Data Validation Rules

- SFM Data Validation Rules defined with the Record Type Name in the expression get evaluated correctly only for English language users. An example of such an expression is Record Type ID Equals Usage/Consumption. For the other languages, the expression has to be defined with the Record Type Label in the required language. For the above example, the expression has to be Record Type ID Equals Utilisation/consommation

Known Issues/Limitations in ServiceMax Mobile for Laptops

Locale Support

- Locales other than English (United States) are not supported

SFM Data Validation Rules

- SFM Data Validation Rules defined with the Record Type Name in the expression get evaluated correctly only for English language users. An example of such an expression is Record Type ID Equals Usage/Consumption. For the other languages, the expression has to be defined with the Record Type Label in the required language. For the above example, the expression has to be Record Type ID Equals Utilisation/consommation

Appendix

How to invoke Dispatch Console with JavaScript Map using Custom Link

Note: This is applicable for versions up to 14.20000.16

1. Create a Custom Link (Salesforce **Setup** | **App Setup** | **Customize** | **Home** | **Custom Links – New**) with the following attributes:

- a. **Label:** Dispatch Console JS
- b. **Name:** Dispatch_Console_JS (auto-populated)
- c. **Behavior:** Execute JavaScript
- d. **Content Source:** **OnClick JavaScript** (default value)
- e. Script in the Custom Button or Link Editor long text area field:

```
var urlString = '/apex/SVMXC__Dcon_DispatchConsole_JS?isdtp=mn';
try
{
var strCommnutniyName = '';
strCommnutniyName = "{!$Site.Prefix}";
if(strCommnutniyName.length != 0)
urlString = strCommnutniyName+urlString;
window.open(urlString, '',
'resizable=1,status=0,toolbar=0,menubar=0,scrollbars=1');
}
catch(err)
{
window.open(urlString, '',
'resizable=1,status=0,toolbar=0,menubar=0,scrollbars=1');
}
```

2. Include the above custom link (Dispatch_Console_JS) to a custom component of type Links and add this component to the required home page layouts

How to invoke Dispatch Console with Flash Map using Custom Link

Note: This is applicable for versions from 14.20000.20

1. Create a Custom Link (Salesforce **Setup** | **App Setup** | **Customize** | **Home** | **Custom Links – New**) with the following attributes:

- a. **Label:** Dispatch Console Flash
- b. **Name:** Dispatch_Console_Flash (auto-populated)
- c. **Behavior:** Execute JavaScript
- d. **Content Source:** **OnClick JavaScript** (default value)
- e. Script in the Custom Button or Link Editor long text area field:

```
var urlString = '/apex/SVMXC__Dcon_DispatchConsole?isdtp=mn';
try
{
var strCommnutniyName = '';
strCommnutniyName = "{!$Site.Prefix}";
if(strCommnutniyName.length != 0)
urlString = strCommnutniyName+urlString;
window.open(urlString, '',
'resizable=1,status=0,toolbar=0,menubar=0,scrollbars=1');
}
catch(err)
{
window.open(urlString, '',
'resizable=1,status=0,toolbar=0,menubar=0,scrollbars=1');
}
```

2. Include the above custom link (Dispatch_Console_Flash) to a custom component of type Links and add this component to the required home page layouts