



ServiceMax Release Notes

ServiceMax Summer '14 (Aug, 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.

About ServiceMax Release Notes

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

It includes

- Brief, high-level descriptions of the functionality
- Setup information
- Best practices to ensure your continued success

The release notes also identify all other changes and provide details about how those changes might affect your organization.

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.

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Release Notes Changes

September 15th, 2014

Added a new section, [ServiceMax Suite Issues Fixed in 14.40000.9](#)

Renamed ServiceMax Suite Issues Fixed in This Release to [ServiceMax Suite Issues Fixed in 14.40000.6](#)

Renamed ServiceMax Mobile Issues Fixed in This Release to [ServiceMax Mobile Issues Fixed in 14.40000.6](#)

Added Configurations Options to [Calculate & Store response times on Case & Work Order](#) section

Updated [Summer '14 Feature Summary and User Impact for ServiceMax Suite](#) for Calculate & Store response times on Case & Work Order feature

September 5th, 2014

Added a note in [Attachments Sharing feature](#) under ServiceMax 14 for iPad regarding the 5 MB limit

Added a new section called [Salesforce Summer '14 Compatibility](#)

August 14th, 2014

Added [Appendix](#) section for [Configuring Crystal Report template to display more than 255 chars in a field](#)

August 8th, 2014

First version

What's New in ServiceMax Summer '14?

The Summer '14 release of ServiceMax brings a variety of exciting features across its apps. The two big offerings in this release are:

- GA release of [ServiceMax Summer 14 for iPhone](#) – The previously available lite version of the app has been enhanced to a full-fledged enterprise app, bringing it to full parity with the ServiceMax Mobile app for iPad for core features. This app is ServiceMax's first step towards Smart Phone support and is available on iPhones 5 and above running iOS 7.x.
- GA release of [ServiceMax Linx for ServicePower](#) – ServiceMax now provides continuous optimization of work order scheduling and drip-fed dispatch. This is achieved by integration with a 3rd party optimization engine which specializes in drip-feed scheduling of work orders to the right technicians based on a combination of parameters.

Following are the other key features and enhancements:

- [SFM Designer enhancements](#) to provide detailed information about inaccessible objects / fields when you select or edit an SFM transaction
- [Calculate & Store response times on Case & Work Order](#) for SLA commitments automatically based on applicable business hours and SLA clock pause times
- Get Price enhancements for [supporting warranty coverage at line level](#) and [using Product Price Book for labor pricing](#). These are available in both online application and mobile apps
- [Attachment Sharing](#) that allows the user to share attachments directly from the iPad through standard iOS share sheet options such as email, text, and AirDrop
- [Advanced Conflict Resolution](#) that allows seamless merging of updates to a record when the changes are done in both Online and iPad and are on different fields
- [Smart Documents support](#) in ServiceMax Mobile for Laptops app, in addition to Crystal Report based reports

Last but not the least, ServiceMax Online Help has new and revised content for [Dispatch Console](#) and [Service Flow Manager](#). These sections now have a new format that is easier to follow, how-to sections with annotated screenshots that aid in quick reference, up-to-date information on recent enhancements, performance considerations, and FAQs.

Summer '14 Feature Summary and User Impact

The Summer '14 Feature Summary and User Impact table shown below identifies the new product features and enhancements. It also details which product features require setup and which features are automatically visible to all end users.

ServiceMax Suite

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
Calculate & Store response times on Case & Work Order		✓	
Support for multi-source scheduled SFM processes		✓	
Get Price function to use Product Price Book for labor pricing		✓	
SFM Designer Enhancements – Object and Field Access Checks	✓		
ServiceMax Linx for ServicePower		✓	✓

ServiceMax Mobile for Laptops

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
Generating Smart Docs		✓	
Get Price function to use Product Price Book for labor pricing		✓	
Line level warranty based price calculation		✓	

ServiceMax Summer 14 for iPad

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
Attachments Sharing	✓		
Advanced Conflict Resolution		✓	

Feature	Enabled for all users	Requires Administrator setup	Contact ServiceMax Support to enable
Line level warranty based price calculation	✓		
Get Price function to use Product Price Book for labor pricing		✓	

Backward Compatibility Matrix

ServiceMax Suite versions supported for Summer 14 Mobile App versions

Mobile App Version	Supported ServiceMax Suite Versions
iPad (14.40.006)	Summer 14 only
iPhone (14.40.010)	Summer 14 only
Mobile for Laptops (14.40.006)	Spring 14 SP (14.31000.4), Summer 14
Offline Client (14.20.0.0)	Winter 14 to Summer 14

ServiceMax Mobile App versions supported with Summer 14 ServiceMax Suite

Mobile App	Supported ServiceMax Mobile app Versions
iPad	Summer 14 only
iPhone	Summer 14 only
Mobile for Laptops	Spring 14 SP (14.31.007), Summer 14
Offline Client	Winter 14 to Summer 14

ServiceMax Suite

Calculate & Store response times on Case & Work Order

It is now possible to accurately report elapsed time for SLA commitments, considering the business hours defined in SLA Terms and SLA Clock pause time(s) if any.

Previously, only the actual completion datetimes were being stored in Case and Work Order for initial response, onsite response, restoration, and resolution. The start datetimes for these are configured in SLA Terms. Since SLAs are based on business hours and not on absolute time, calculating the elapsed time for these responses required customization.

Starting this release, the following fields have been introduced in both Case & Work Order:

- Time to Initial Response (in Minutes)
- Time to Onsite Response (in Minutes)
- Time to Restore (in Minutes)
- Time to Resolve (in Minutes)

These fields store the response time based on the difference between the applicable start datetime and actual completion datetime, after applying the configured business hours. If the SLA clocks were paused in between, the cumulative pause time applicable for the specific response type is deducted from the response time.

These response times are calculated automatically on update of Case / Work Order, if there is a change in the start datetime or actual completion datetime field values.

Note: The calculation for these fields happens only on the server and is available on mobile devices after the record is synchronized back.

Configuration Options

From version 14.40000.9, the following global configuration settings have been introduced. The deployment configurator should be run to load these settings when upgrading to this version. Set the appropriate configuration setting to true to enable the feature.

Module: **Service Level Agreement**

Submodule: **SLA Clock on Case**

Setting ID: **SET005**

Setting Name: **Calculate SLA Response Time**

Default Value: **False**

Module: **Service Level Agreement**

Submodule: **SLA Clock on Work Order**

Setting ID: **SET005**

Setting Name: **Calculate SLA Response Time**

Default Value: **False**

Note: These settings are independent of SET003 (Enable SLA Clocks for Case / Work Order) in the above submodules.

Support for multi-source scheduled SFM processes

Scheduled SFM Processes now support multi-source SFM transactions.

This feature can be used to set up processes for scenarios such as creating a work order from a counter reading automatically when a threshold is reached. Counter readings pertain to an installed product. When a work order is created from a counter reading, we will need to pull in information from the installed product.

Hence, a multi-source SFM process would be required where the primary process will create the work order from the counter reading record. The secondary process will copy the information (such as Account, Contact, and Location) from Installed Product. This process can be scheduled to run periodically so that the work orders can be created automatically when the counter reading value reaches the specified threshold.

However, if the secondary source in a multi-source process is expected to be selected by the user interactively, such an SFM transaction will be executed with just the primary source only. This applies to all the standard SFM transactions with multi-source configuration. These standard SFM transactions can be cloned and the secondary source field can be mapped to a specific value (e.g. Service Plan or PM Plan Template) to make them get executed by Scheduled SFM as multi-source processes

Get Price function to use Product Price Book for labor pricing

It is possible now to list both parts and labor pricing in Product Price Book instead of listing labor pricing separately in the Service Pricebook. This feature allows customers who prefer to use a single price book to manage parts and labor pricing, to take advantage of the comprehensive price calculation and invoicing capabilities that ServiceMax offers.

A new global configuration setting has been introduced to enable this.

Module: **Work Order**

Submodule: **Create Work Order Lines VF**

Setting Id: **SET019**

Setting Name: **Source for Labor price book**

Default Value: **Service price book**

To enable this feature, change the value of this setting to **Product price book** for the active org-wide configuration profile. If using mobile apps, perform configuration sync or reset app to reflect the changes. This results in the following behaviour:

- Activity Type for the work detail line is ignored while determining the type of price book to be used
- For all billable labor lines, the configured Product Price Book is queried for the pricing information
- Any special pricing defined under Parts Pricing and Parts Discount are also applied

- Any Labor Rounding Rules defined are applied
- All labor specific coverages from Warranty or Service Contract (based on the chosen entitlement) are applied

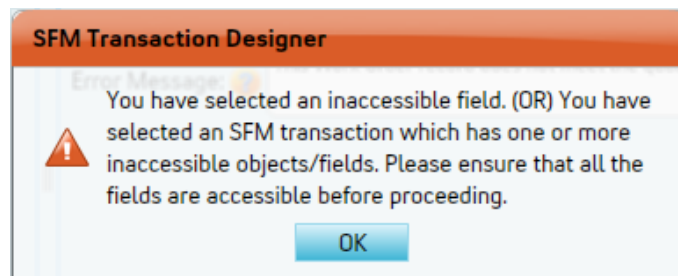
This feature is supported in all ServiceMax mobile apps also.

Note: The standard page layouts related to Work Detail lines have to be cloned and modified to add **Discount %** field to Labor tab.

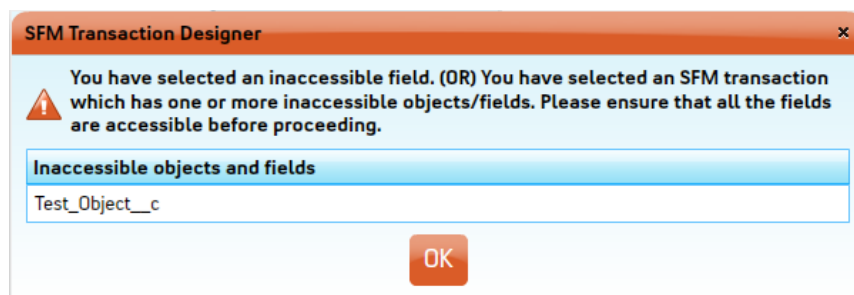
Object and Field Access Check in SFM Designer

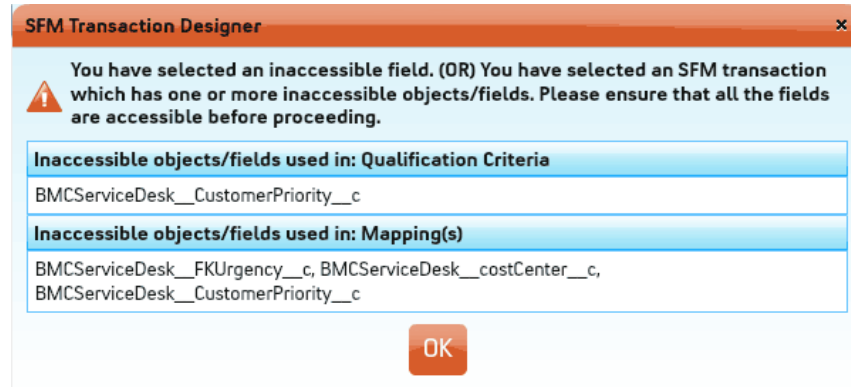
SFM Designer now displays warning messages when objects / fields configured or selected for configuration in an SFM transaction are not accessible to the logged in user.

The following message is displayed when you select an inaccessible field from the field picklist when creating / editing an expression. This can happen if you do not have access to that field. This can also happen if you do not have license for the package which includes the selected field.



A message similar to one of following messages is displayed when you select an SFM transaction for viewing / editing / cloning, and it includes an object or field in another package for which you do not have license. This transaction might have been designed previously by a user with license, or your license might have been revoked. This message is also displayed if the object included in the transaction has been deleted.





When any of the above messages are displayed, ensure license, profile access, and availability of the required fields and objects, and launch the SFM Designer again.

Note:

If an SFM transaction includes a deleted field, no error message is displayed.

The expressions, maps, source/target object updates, page layouts, and advanced options display a blank value where the deleted field was configured. Saving these configurations, after any updates as required, will remove the deleted field from the SFM configuration.

The above behavior is to ensure that deleted fields need not be undeleted or recreated to be able to access and update such SFM transactions.

ServiceMax Linx for ServicePower (GA Release)

Overview

ServiceMax now provides continuous optimization of work order scheduling and drip-fed dispatch. This is achieved by integration with a 3rd party optimization engine, ServicePower which specializes in drip-feed scheduling of work orders to the right technicians based on a combination of parameters.

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 ServicePower's continuous optimization capability to 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 Summer 14 for iPad).

Salient aspects of this feature:

- Optimized work schedules are received from ServicePower when work orders are created/updated and qualify for the configured dispatch process
- Get Appointments screen enables on-demand appointments for a work order
 - Displays the list of available appointment slots
 - Number of appointment slots to display for selection is configurable per ServiceMax Group Profile
- Updates to Work Order schedule and status pulled to ServiceMax at configurable (org-wide) scheduled intervals, based on continuous optimization in ServicePower
- Only the optimized schedules from ServicePower are drip-fed into the iPad Mobile App
- Updates to the work order based on the technician's progress are synchronized from mobile clients, and are sent to ServicePower for optimization of other work orders
- Any events created in mobile apps and synced to online must be flagged as drip-fed events in online (during implementation), for them to be synced back to the mobile app
- Continuous optimization can be stopped by force-fixing the schedule for the work order. With force-fix, the current schedule will be treated as final
- Force-fixed work order can be unfix, enabling it for further schedule optimization
- Work order can be slotted for manual dispatch by sending it to **Unresourced Tray**
- Cancelling a work order deletes the related event for the assigned technician and makes that slot available for further scheduling
- Work Orders are flagged to be in **Jeopardy** when they are in risk of violating scheduling commitments such as SLAs
- Non-work order events for any technician can be sent to ServicePower, and would be considered as unavailable slots for scheduling

Configurations related to this feature:

Three types of configurations are required to set up this feature:

- Salesforce Configurations
 - ServicePower URL must be added as an Active Remote Site
 - A custom Force.com Site has to be created to enable dispatch notification from ServicePower
- ServicePower Configurations
 - Service Territories, Technicians, and Skills set up in ServiceMax must be mirrored in ServicePower
- ServiceMax Configurations
 - ServicePower has to be enabled, by obtaining for the org the ServiceMax Installation Key which includes the license for this feature

- Dispatch Process of type **Linx for ServicePower** has to be configured to enable automatic scheduling of work orders by ServicePower
- SFM Wizard has to be configured for Get Appointments screen
- SP Scheduler must be started to get updates made in ServicePower reflected in ServiceMax at regular intervals
- Key configuration settings which must be set to appropriate values:
 - Global setting GBL023, ServicePower Endpoint URL, under Common – Global Settings)
 - Global setting GBL024, Dispatching Tool, under Common – Global Settings (Internal for Dispatch Console, External for 3rd Party Tool)
 - Group settings SET001 and SET002, under Dispatch Management – Drip Feed (to enable drip feeding events to the iPad Mobile App)
 - Global setting SET002, Consider non-Work Order events for optimization, under Work Order – Manage ServiceMax Events

ServiceMax Mobile for Laptops

Generating Smart Documents

Smart Documents are now available for ServiceMax Mobile for Laptops. Smart Documents harness the power of SFM to easily design and deliver complex service reports. These reports combine data elements and HTML formatting using various functions and ServiceMax literals.

Smart Document can include ServiceMax and Salesforce.com data such as company name and logo, work order details, work performed, and billing details, to produce well formatted service reports. Using Smart Documents, you can capture multiple signatures for both technicians and customers using Topaz Electronic Signature pads only.

The report is converted to PDF locally and attached to the Salesforce record. It is uploaded on synchronization and is available under the Attachments section of the record. The maximum size allowed is 5 MB.

Note:

The standard **Print Service Report** SFM wizard step in the **Field Service Under Contract** wizard will launch the standard Work Order Report designed using Crystal reports by default. For launching the standard work order service report designed using Smart Documents, execute the following steps.

1. Clone the standard SFM transaction **Work Order Service Report**
2. Create an SFM Wizard step for the above cloned process
3. Perform a Configuration Sync on the Laptop Mobile client to download the new processes

Get Price function to use Product Price Book for labor pricing

The functionality and configuration of this feature for ServiceMax Mobile for Laptops app is the same as that for the online application. See the online section to know the details about [using Product Price Book for labor pricing](#).

Line level warranty based price calculation

Get Price now considers product warranty at the line level for every installed product.

A single job-site centric work order covers multiple installed products. When the work order might be entitled by a contract, individual installed products might be entitled by a product warranty. This feature now enables the Get Price function to consider the product warranty entitlements applicable for each of the installed products serviced and arrive at the correct pricing for parts, labor, travel, and expenses at the click of a single button.

Note: This feature will be applicable for work orders that are not entitled by a Service Contract or Warranty, but have Product Serviced lines with Installed Products having valid warranty coverage, only when the 'Is Entitlement Check Performed' field is set to True.

ServiceMax Summer 14 for iPad

Attachment Sharing

Attachments can now be shared directly from the iPad app when viewing or editing a record. The native iOS share sheet has been integrated with ServiceMax Summer 14 for iPad app for this feature. This allows sharing of locally available attachments using email, text, and AirDrop, and printing them directly from the device.

This feature enables the user to achieve the following:

- Share downloaded attachments when viewing / editing a record by selecting one or more available attachments and tapping on Share icon
- Use the standard options in iOS share sheet such as email, text, and AirDrop
- Print one or more attachments
- Cancel sharing and printing when in progress
- Delete one or more attachments, both locally on the device and permanently online

Note:

- The number of attachments that can be shared in a single email, text or AirDrop depends on the overall size of the selected attachments. It is recommended that multiple attachments be shared in batches of 5. If there are large attachments, share them individually.
- Attachments greater than 5 MB in size cannot be shared using this feature
- Locally generated Smart Documents can be shared after they have been synced to the server

Advanced Conflict Resolution

The Advanced Conflict Resolution feature brings the ability to merge updates to a record when it has been updated in both Online and iPad. With this feature, changes made to different fields of the same record can be merged seamlessly without any data loss or manual intervention.

The following group-wide configuration setting has been introduced for this feature:

Module: **ServiceMax iPad Client**

Submodule: **Synchronization**

Setting Id: **SET016**

Setting Name: **Advanced conflict resolution during data synchronization**

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 Configuration Sync or Reset App. This results in the following behaviour:

- During data synchronization, only those fields which have been modified are sent to the server from the iPad app
- Synchronization conflicts are raised only when the same field has been modified in both online and iPad app
- Data in fields can be cleared and synchronized. This would result in the values being cleared on the server also. However, clearing of lookup fields is not supported

Note: This feature is available only on the iPad app and not yet on other ServiceMax mobile apps.

Line-level warranty based price calculation

Get Price now considers product warranty at the line level for every installed product.

A single job-site centric work order covers multiple installed products. When the work order might be entitled by a contract, individual installed products might be entitled by a product warranty. This feature now enables the Get Price function to consider the product warranty entitlements applicable for each of the installed products serviced and arrive at the correct pricing for parts, labor, travel, and expenses at the click of a single button.

Note: There can be work orders which are not entitled by a Service Contract or Warranty, but have Product Serviced lines with Installed Products that have valid warranty coverage. For this feature to work for such work orders, the 'Is Entitlement Check Performed' field must be set to True.

Get Price function to use Product Price Book for labor pricing

The functionality and configuration of this feature for ServiceMax Mobile for Laptops app is the same as that for the online application. See the online section to know the details about [using Product Price Book for labor pricing](#).

ServiceMax Summer 14 for iPhone (GA Release)

Overview

ServiceMax Summer 14 for iPhone app, a fully native iOS app, is available on iPhones 5, 5S, and 5C running iOS 7. The previously available lite version has been enhanced to an enterprise ready application. This release provides a complete field service application with amazing usability. Field service technicians and engineers now have mobile phone access to everything they need to deliver flawless field service, regardless of device form factor and Internet connectivity.

Key Features

- Initial Sync & Reset App
 - Download configuration data – SFM Transactions, Wizards, and Searches
 - Download events with related records and their child records
 - Download data as per Download Criteria and Advanced Download Criteria
- Synchronization
 - Aggressive Data Sync triggered on Event edit and Record edit to sync changes
 - Manual Data Sync to get events, related data, and download criteria data
 - Successive Sync to allow continuous edits to data during synchronization
 - Display last sync status and timestamp
 - Manual Configuration Sync to bring configuration changes
 - Conflict management to handle simultaneous updates to the same record
- View events on the calendar with distinct highlighting for high priority
- Edit events and reschedule events to another available slot
- View, edit, create, and delete records
- Generate Smart Documents, capture signatures, and attach them as PDF files
- Advanced Data Validation Rules to display an error or confirmation message
- SFM Search in offline mode
- Advanced JavaScript-based price calculation, with support for Line level warranty based price calculation and Product Price book for labor pricing
- Show route between technician's current location and Work Order location through native Apple Map support

Configuration

Server configuration for iPhone App is similar to that for iPad App, and is achieved using Mobile Configuration screen and SFM Mobile Permissions screen.

Client Configuration is also similar to that for iPad App and supports Login Host and Request Timeout (In Minutes) settings on the device.

Salesforce Summer '14 Compatibility

Feature	iPad App	Laptop Mobile App
Increase in Attachments size limit from 5 MB to 25 MB	Supported for direct uploads & downloads Not supported for attachments sharing	Not supported 5 MB limit still applies

ServiceMax Suite Issues Fixed in 14.40000.9

Defect Number	Description
SMX012936	In Dispatch Console, when a non-Work Order event is edited and start date is changed, end date is automatically set to start date. If the event spans across dates, this results in changing the existing event duration
SMX013537	Saving of Case / Work Order records fails with 'SVMXC:Too many SOQL queries: 101' exception, if there are workflow rules and/or custom triggers on Case / Work Order. Note: Fix for this issue introduces settings to enable / disable calculation of SLA Response Time for Case and Work Order. Details of these settings are described in 'Calculate & Store response times on Case & Work Order' section
SMX013576	Dispatch Console views that are not associated with any Dispatcher / Technician are not available to any user

ServiceMax Suite Issues Fixed in 14.40000.6

Defect Number	Description
SMX010395	<p>When the alias configured for a header or child object starts with a number for an SFM transaction of type Output Document, the field values are not displayed for the header / child record, when the output document is generated.</p> <p>Note:</p> <p>This fix prefixes 'N' to the aliases defined in the Create/Edit SFM Transaction tab that start with a number.</p> <p>There is an additional check for uniqueness of alias name in Create/Edit SFM Transaction and Template Designer tabs on navigating to another tab or saving the template.</p> <p>This fix does not resolve the issue for Output Document transactions configured before Spring 14 SP. In such cases, a new template has to be created after upgrade to Summer 14.</p>
SMX012410	In Dispatch Console, events created in Manage Multiple Assignments window are not displayed in the calendar without refresh, when daylight saving time is in effect for the user's local system time zone.
SMX012573	Dispatch Console allows double booking if an existing event has the same start date time and end date time as the event being created / edited.
SMX012645	Dispatch Console with JavaScript Map displays blank value for fields which have double byte characters such as Korean or Chinese. This happens when the logged in user's language is English.
SMX012650	When the child records are sorted interactively in SFM delivery and saved, field values of child records get interchanged.
SMX012728	<p>Dispatch Console Status filter for New status does not return some work orders whose Dispatch Status is New. These are returned only for the filter option All. These excluded New work orders are assigned to Technician, but the Service Team is blank.</p> <p>Note: The fix sets Dispatch Status to Assigned if Technician is not blank, even if Service Team is blank.</p>

Defect Number	Description
SMX012808	<p>Refresh of Dispatch Console calendar fails to complete when both these conditions are true:</p> <p>There is a Work Order event in the selected date range, but its associated work order is deleted.</p> <p>Dispatch Console Field Updates is configured with only Work Order fields.</p>
SMX012935	In SFM Designer, Source Object Update configuration for checkbox field does not retain its value when it is set to False. However, the configuration is saved in the backend and source object update works as expected in SFM Delivery.
SMX013068	In SFM Designer, the following issue is observed in the filter section of Lookup Attributes tab in lookup configuration dialog box: The operand picklist for Record Type fields does not display the Record Type values for selection.
SMX013090	In the standalone Manage SFM Expressions configuration screen, Advanced Expression defined is not saved.
SMX013098	<p>SFM Search displays the same value for different lookup fields when these lookup fields are of the same object and the same second level reference is configured.</p> <p>For example, if Work Order - Component → City and Work Order - Top-Level → City fields are included as display fields, both of them display the value of the second configured field.</p>

ServiceMax Mobile Issues Fixed in 14.40000.6

Defect Number	Description
SMX011937	When there are more than 30,000 products, price book entries are not being downloaded for all products.

ServiceMax Summer 14 for iPad Issues Fixed in this release

Defect Number	Description
SMX010580	Entitled Service Contracts or Warranty terms are not being considered for price calculation if the current date is greater than entitlement expiration date
SMX011236	For numeric fields, number of decimal places displayed and accepted is not as per the field definition. These fields accept only 2 decimal digits, irrespective of the decimal places configured in the field definition.
SMX011786	Setting a field to null on the device does not set it to null on the server. The previous value is synchronized back to the device. Note: This fix does not apply to Lookup fields.
SMX012224	The app needs to be restarted if the session times out or becomes invalid. Note: This fix applies only for data sync. For other operations such as configuration sync and event sync, or when remote access is revoked, app has to be restarted.
SMX012232	Images from the camera roll when attached to a record are resized and appear distorted.
SMX012254	When a Smart Document is generated in iPad under low connectivity, the application crashes intermittently.
SMX012265	If the auto-correct bubble displayed for a text field is not dismissed before entering value in a date or picklist field, the auto-correct suggestion text is appended to the input text in the text field.
SMX012280	When a Smart Document is generated in iPad by a user who has a single quote (') in his/her name, an error 'OPDoc.html Data base error' is shown and the document is not generated.
SMX012390	When new child records are added in offline mode and then the same child records get saved again while still in offline mode, they do not get synchronized to server when Sync V2.0 is used. The same records can get saved again when the master record is opened and some more new lines are added or existing lines are updated.
SMX012479	Qualifying criteria containing date literals NOW, YESTERDAY, TODAY, and TOMORROW do not work in Smart Documents.

Defect Number	Description
SMX012524	When a field is set to null using a Before Insert trigger on the server, it is not synchronized back to the iPad app. The field on the iPad app continues to retain the old value.
SMX012693	Updates to Salesforce standard field Type in supported Salesforce standard objects such as Case, Account, and Opportunity are not synchronized to server
SMX012799	Recents shows only the first 100 records instead of the latest 100 records.
SMX012841	<p>When adding multiple child lines, lookup field search does not search based on the search fields defined in the lookup configuration. Hence, lookup field search returns different results when adding single child line and multiple child lines.</p> <p>Note: The fix does not apply Lookup Context and Advanced filter when adding multiple child lines.</p>
SMX012856	Synchronization of updates to Contacts fails when Sync V2.0 is used

ServiceMax Mobile for Laptops Issues Fixed in this Release

Defect Number	Description
SMX010088	SFM Wizards are displayed in an alphabetically sorted order and not as per the sequence defined in the Layout Configuration.
SMX011937	When there are more than 30,000 products, price book entries are not being downloaded for all products.
SMX012064	Lookup field search does not return any results when the lookup configuration includes a basic or advanced filter based on Record Type field.
SMX012248	Lookup field search does not return any results if an advanced filter in the lookup configuration has multiple expressions.
SMX012337	When using French locale, values in number fields are replaced with 'NaN' on save.
SMX012476	Service Report generated using Crystal Reports does not print more than 255 characters for any fields Note: The fix addresses the issue for fields in header only. Fields in line items will still display the first 255 characters only. The standard/custom templates need to be edited for the fix to work. Refer to Appendix for instructions.
SMX012493	When large volume of data is synchronized to the server, some of the newly created child records are not saved in the server.
SMX012679	Sorting of child records in SFM delivery screen does not work.
SMX012691	In a Person Account enabled org, when custom picklists and lookup fields from Contact are added to the Account lookup bubble, their Salesforce Ids and API names are also displayed in addition to the expected field label and value.
SMX012826	Initial Sync fails when the Mobile for Laptop client is used in a proxy-enabled network.
SMX013098	SFM Search displays the same value for different lookup fields when these lookup fields are of the same object and the same second level reference is configured. For example, if Work Order - Component → City and Work Order - Top-Level → City fields are included as display fields, both of them display the value of the second configured field.

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
- MTTTS Rules, Territory Match Rules, Dispatch Processes, Booking Windows
- 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
- Service Org, Territories

End user screens:

- SFM Wizard Delivery
- Get Appointments (on Work Order for ServiceMax Linx for ServicePower)

ServiceMax Linx for ServicePower

Drip feed from ServicePower can apply group-wide settings for only one group

When work orders and events are updated by ServicePower through push notification, the user account associated with the custom Force.com site (created for Dispatch Client) is used. As one user's Salesforce Profile can be associated with only one ServiceMax Group Profile, the drip feed fields cannot be updated based on the values of configuration settings specified for all the group profiles applicable to users of Linx for ServicePower.

The settings are SET001 – Enable Drip Feed and SET002 – Drip Feed fields under module Dispatch Management and submodule Drip Feed.

Following workaround can be used to partially overcome this – this ensures that values of org-wide configuration settings are used instead:

- Set SET001 to True and SET002 to the values of all the Drip Feed fields in Work Order and Event objects for the active org-wide ServiceMax configuration profile
- Do not associate the Salesforce Profile Dispatch Client user with any ServiceMax group configuration profile

Overlapping Schedules

Work Order event gets overlapped with non-Work Order event, when user tries to move an existing Work Order event to overlap with a non-Work Order event.

Sync issues from ServiceMax to ServicePower

- Even after a tentatively scheduled work order is updated such that it no longer qualifies for optimization, it continues to be optimized by ServicePower
- When an appointment is booked using Get Appointments screen and then the event duration is updated in Dispatch Console, Work Order Service Duration is not updated; only event is updated
- Deleting an event / unassigning a work order using Dispatch Console does not remove the event in ServicePower

Known Issues/Limitations in ServiceMax Mobile for Laptops

Generating Smart Documents

The standard **Print Service Report** SFM wizard step in the **Field Service Under Contract** wizard will launch the standard Work Order Report designed using Crystal reports by default. For launching the standard work order service report designed using Smart Documents, execute the following steps:

1. Clone the standard SFM transaction **Work Order Service Report**
2. Create an SFM Wizard step for the above cloned process
3. Perform a configuration sync on the Laptop Mobile client to download the new processes

Line level warranty based price calculation

- At least one view process for Warranty Terms should be assigned to the technician's group profile for warranty information to be downloaded to the device
- This feature works only for those installed products that are locally available on the device
- The field 'Is Entitlement Check Performed' should be set to True for work orders that do not have any Service Contract or Warranty coverage, but have Product Serviced lines with installed products having valid warranty coverage
- The work order should have been synced at least once to the server for the price calculation to work

Locale Support

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

Known Issues/Limitations in ServiceMax Summer 14 for iPad

Attachment Sharing

- Emails can only be sent from the email configured to be used on the native iOS email application
- Social networking apps cannot be used for sharing attachments. No such apps, even if present on the device, will be shown in the iOS share sheet from the iPad app
- Attachments need to be locally downloaded to the device before they can be shared using the iOS share sheet
- Smart Documents generated locally have to be synced to the server at least once before they can be shared
- Deleting attachments
 - Attachments can only be deleted in the edit mode. Once an attachment is deleted, it is permanently removed from the record in online. This cannot be reversed
 - Attachment marked as Private can be deleted if it has already been downloaded to the iPad app
- Image is saved using the date when it was first attached to a record and uploaded to Salesforce, and not when it was downloaded to the iPad app
- Since the images are grouped by date in iPad photo library, images downloaded recently can appear in older date / year group
- If an attachment of unrecognized format is shared, then it is not reflected in the count of attachments selected
- If the overall size of selected attachments exceeds the limit on the app used for sharing, some of the attachments do not get shared. Workaround is to share them individually.

Line level warranty based price calculation

- At least one view process for Warranty Terms should be assigned to the technician's group profile for warranty information to be downloaded to the device
- This feature works only for those installed products that are locally available on the device
- The field 'Is Entitlement Check Performed' should be set to True for work orders that do not have any Service Contract or Warranty coverage, but have Product Serviced lines with installed products having valid warranty coverage
- The work order should have been synced at least once to the server for the price calculation to work

Advanced Conflict Resolution

- Values in Lookup fields cannot be cleared / removed by clearing them on the iPad app and syncing to server.

- The app throws conflict if the same field is updated with the same value in Online and iPad app. This happens for field types Number, Percent, Currency, and Date
- If Date field is updated from the iPad app and any other field of a different data type is updated on the server, conflict is thrown irrespective of the advanced conflict resolution setting value. Fields values are not merged

Data Purging

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

Known Issues/Limitations in ServiceMax Summer 14 for iPhone

The following features are not supported:

1. Scheduled Configuration Sync and Custom web service Sync
2. Advanced Conflict resolution for handling field level merges
3. SFM search with Include Online results option and Download on Demand for such records
4. Context sensitive Lookups, Advanced lookup filters, and Form Fill
5. Other features: SLA Clock, Linked SFMs, Data Purge, Attachments support, Location Tracking , Barcode Scanning

Appendix

Configuring Crystal Report template to display more than 255 chars in a field

Crystal Reports generated from ServiceMax Mobile for Laptops show only up to 255 characters in any field by default, unless configured explicitly to display more. The following steps list how standard or custom templates can be configured for displaying more than 255 characters.

Note: Only fields in header object can be configured to display more than 255 characters. Fields in line items will still display the first 255 characters only.

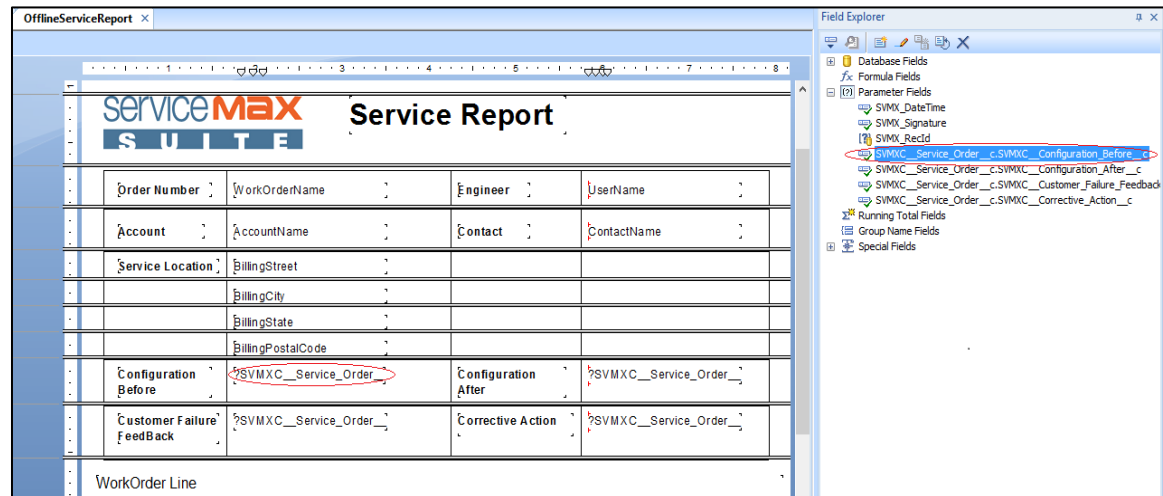
1. Open the standard / custom report template using Crystal Report Designer
2. For each field which contains long text
 - i. Choose the field which contains long text
 - ii. Create a New Parameter Field for such field by right clicking on Parameter Field under Field Explorer, and provide a unique parameter name of type String

Note:

Format of Parameter name is <Object API name>.<Field API name>

(Example: SVMXC__Service_Order__c.SVMXC__Configuration_Before__c)

- iii. Drag and drop the newly created parameter field on the report template against the field label (as shown in the figure below)



- iv. Right click on the field and choose Format Field
 - v. In the Format Editor window > Common tab, select the 'Can Grow' option. This enables the field length to grow vertically & word-wrap automatically in the report.
3. Save the template