



ServiceMax Release Notes

ServiceMax Summer '14 SP (Sep, 2014)

(Reposted on 12th Aug, 2015)

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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 SP 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

August 12th, 2015

Added section [ServiceMax Suite Issues Fixed in 14.50000.12](#) and ServiceMax Summer 14 for [iPad Issues Fixed in 14.50.019](#)

Updated [Known Issues/Limitations in ServiceMax Summer 14 for iPad](#) section for 12-hour time format support

April 14th, 2015

Added sections [ServiceMax Suite Issues Fixed in 14.50000.9](#) and [ServiceMax Mobile Issues Fixed in 14.50000.9](#)

Renamed section *ServiceMax Suite Issues Fixed in this Release* to [ServiceMax Suite Issues Fixed in 14.50000.4](#)

Renamed section *ServiceMax Mobile Issues Fixed in this Release* to [ServiceMax Mobile Issues Fixed in 14.50000.4](#)

Added section [ServiceMax Summer 14 for iPad Issues Fixed in 14.50.015](#)

February 11th, 2015

Added section [ServiceMax Summer 14 for iPad Issues Fixed in 14.50.011](#)

January 15th, 2015

Added section [ServiceMax Summer 14 for iPad Issues Fixed in 14.50.010](#)

Renamed section *ServiceMax Summer 14 for iPad Issues Fixed in this release* to [ServiceMax Summer 14 for iPad Issues Fixed in 14.50.001](#)

October 6th, 2014

Updated [Known Issues/Limitations in ServiceMax Summer 14 for iPad](#) for Attachment Sharing and Download on Demand features in iOS 8.0.x

September 30th, 2014

First version

What's New in ServiceMax Summer '14 SP?

The Summer '14 SP release of ServiceMax is a Service Pack offering for the ServiceMax Summer '14 release. Apart from bug fixes, this release offers a preview of our much awaited Android app and few other key enhancements as listed below:

- Preview release of [ServiceMax Winter 15 for Android](#) – This app further extends ServiceMax's mobile app repertoire and brings our presence to the Android market. It is available for Android KitKat (version 4.4)
- [Location-based Preventive Maintenance Plans](#)
- [Swedish language support](#) & translations update for all the other supported languages
- [SFM Designer enhancements](#) to configure After Add Record events for child records, and error handling for missing JavaScript code snippet configurations
- [Dispatch Console enhancement](#) to display of name values of up to 35 lookup fields
- iOS 8 support for iPad and iPhone apps

Summer '14 SP 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
Location-based PM Plans		✓	
SFM Designer Enhancements		✓	
Dispatch Console Enhancement	✓		
Swedish Language Support	✓		

Backward Compatibility Matrix

Version numbers mentioned below are the minimum version numbers supported.

ServiceMax Suite versions supported for Summer 14 SP Mobile App versions

Mobile App Version	Supported ServiceMax Suite Versions
iPad (14.50.010)	Summer 14, Summer 14 SP
iPhone (14.50.000)	Summer 14, Summer 14 SP
Mobile for Laptops (14.50.002)	Summer 14, Summer 14 SP
Offline Client (14.20.0.0)	Winter 14 to Summer 14 SP

ServiceMax Mobile App versions supported with Summer 14 SP ServiceMax Suite

Mobile App	Supported ServiceMax Mobile app Versions
iPad	Summer 14, Summer 14 SP
iPhone	Summer 14, Summer 14 SP
Mobile for Laptops	Summer 14, Summer 14 SP
Offline Client	Spring 14

ServiceMax Suite

Location-based Preventive Maintenance Plans

ServiceMax now supports creation of Preventive Maintenance Plans for location-based contracts and service calls. This addresses the needs of businesses that provide services at a location for multiple items, but not related to specific installed products.

Overview

The salient aspects of the feature are:

- Uses the **Coverage Type** field in the **Preventive Maintenance Plan**, to determine if the PM plan should be based on Product, Account, or Location
- Introduces **Location Criteria** in the **PM Plan templates**, so that only qualified locations are included as covered locations when a PM Plan is created
- Allows manual addition of locations to PM coverages
- Introduces **field map from Location to Work Order** for use by **PM process**, when it creates work orders for location-based PM Plans
- Is controlled by a **global setting** for backward compatibility

Note:

- For location-based PM plans, **one work order** will be created **for each covered location**, even if the PM process is configured to create one work order per plan.
- Coverage Type field in the PM Plan Template is not used for this feature.

How Covered Locations are determined

Following table shows how Preventive Maintenance Coverage records are created when PM Plans are created from different sources:

PM Plan Source	Preventive Maintenance Coverage Source
Account	Locations associated with the Account
Location	Source location
PM Offering	Covered locations of the Service/Maintenance Contract associated with the PM Offering
Service/Maintenance Contract	Covered locations of the contract

Note:

- It is not possible to create location-based PM Plans from Installed Product
- PM plans without valid PM coverages cannot be activated. However, any activation notes entered will be retained in the PM plan

PM Process

When this [feature is enabled](#), Field Map from Location to Work Order can be configured. PM process uses this to create work orders from locations for location-based PM Plans.

If **Assign To** is set as **Primary Technician**, work orders created for location-based PM plans are assigned to the **Preferred Technician** of the location's Account.

Configuration Settings

New Setting:

Set this global configuration setting to True to enable this feature.

Module: **Preventive Maintenance**
 Submodule: **Manage PM Plan**
 Setting ID: **SET003**
 Setting Name: **Enable location-based PM Plan**
 Default Value: **False**

Updated Setting:

This global setting now applies to both covered products and covered locations.

Module: **Preventive Maintenance**
 Submodule: **PM Scheduler**
 Setting ID: **SET002**
 Setting Name: **PM Coverage batch size** (was Covered Product batch size)
 Default Value: **200**

Standard (OOTB) SFM Transactions and SFM Wizards

New SFM Transactions:

SFM Transaction Name & ID	SFM Transaction ID	Type
Manage Account-based Preventive Maintenance Plan	ED_PMPPlan_Account	Standalone Edit
Manage Location-based Preventive Maintenance Plan	ED_PMPPlan_Location	Standalone Edit

Enhanced SFM Transactions:

SFM Transaction Name & ID	Enhancements
Create Preventive Maintenance Plan from Account (CR_PM_FromAccount)	Coverage Type field made Required Coverage Type mapped to Product (Must have IB)
Create Preventive Maintenance Plan from Installed Product (CR_PM_FromIB)	Coverage Type field made Read Only Coverage Type mapped to Product (Must have IB)
Create Preventive Maintenance Plan from Location (CR_PM_FromLocation)	Coverage Type field made Required Coverage Type mapped to Product (Must have IB)
Create Preventive Maintenance Plan from PM Offerings (CR_PM_FromPMOffering)	Coverage Type field made Required Coverage Type mapped to Product (Must have IB)
Create Preventive Maintenance Plan from PM Template (CR_PM_FromTemplate)	Removed mapping for Coverage Type
Create Preventive Maintenance Plan from Service Contract (CR_PM_FromSContract)	Coverage Type field made Required Coverage Type mapped to Product (Must have IB)
Create Preventive Maintenance Plan Template (CR_PMPanTemplate) Manage Preventive Maintenance Plan Template (ED_PMPanTemplate)	New Rule lookup : SVMXSTD: Location Criteria Lookup
Manage Preventive Maintenance Plan (ED_PMPan)	Name changed to Manage Product-based Preventive Maintenance Plan Qualifying criteria introduced SVMXSTD: Product Preventive Maintenance Plan

Enhanced SFM Wizard:Object: **Preventive Maintenance Plan**Wizard Title: **Manage Plan**Wizard Id: **PM_SFW001**

Changes:

- Two new steps have been added for SFM transactions **Manage Account-based Preventive Maintenance Plan** and **Manage Location-based Preventive Maintenance Plan**
- Existing step **Edit Plan Title** has been changed to **Manage PM Plan (Product Coverage)** with qualifying criteria **SVMXSTD: Product Preventive Maintenance Plan**

Language Support

ServiceMax Suite now offers Swedish Language support with out-of-the-box translations for all ServiceMax strings including all standard SFM transactions, wizards, searches, and inventory processes.

For all the other supported languages, translations have been updated to cover all new features released till the Summer '14 release of ServiceMax.

Dispatch Console Enhancement

Dispatch Console now displays the name field values of up to 35 lookup fields in Work Order grid. Previously, this was limited to 25 fields and Salesforce IDs were being displayed for the remaining lookup fields.

This limit of 35 fields is based on Salesforce limit. When Salesforce increases the limit, you can increase the limit in Dispatch Console by updating the value of the following global configuration setting.

Module: **ServiceMax iPad Client**

Submodule: **Synchronization**

Setting ID: **SET013**

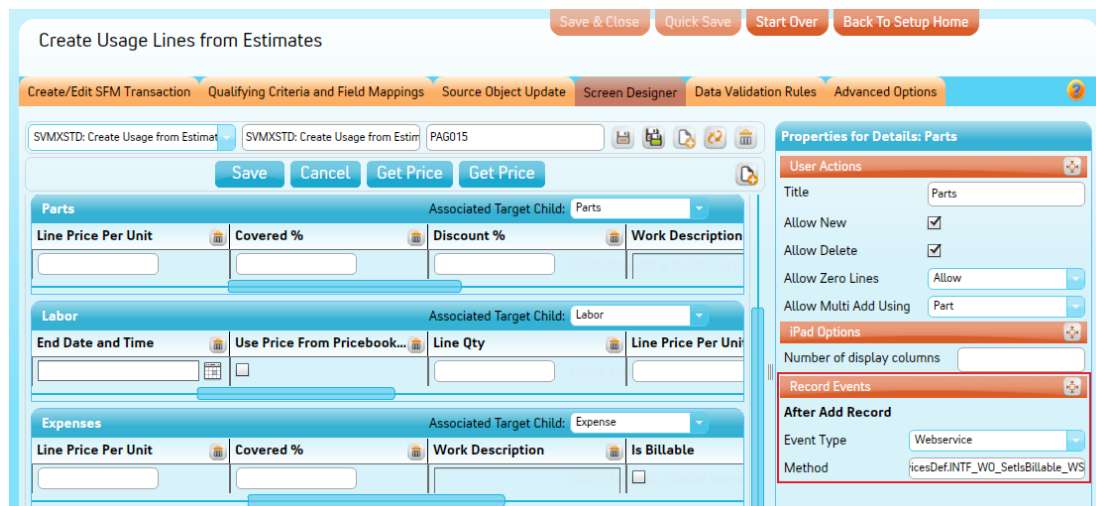
Setting Name: **Maximum number of lookup fields for which name field can be queried**

Default Value: **35**

SFM Transaction & Docs Designer Enhancements

- **After Add Record web services / JavaScript events for child records**

SFM Designer now supports the ability to configure After Add Record web services / JavaScript events for child sections in the Screen Designer. The following screenshot illustrates the same.

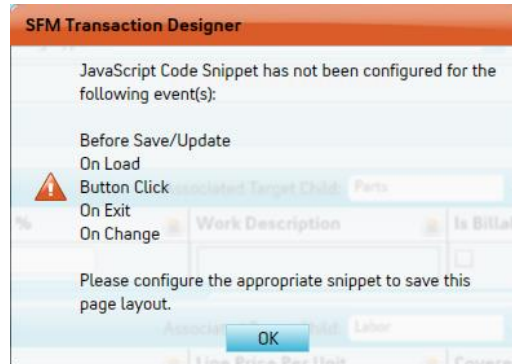


The standard SFM Transactions that support After Add Record web services are

- Manage Work Order Lines – Usage
- Create Usage Lines from Estimates

- **Error handling for missing JavaScript code snippet configurations**

SFM Designer now supports error handling and reporting for missing JavaScript code snippet configurations. When such a page layout is viewed, error message similar to the one illustrated below is displayed.



Associating the required code snippet in the Screen Designer and saving the page layout will fix the error.

ServiceMax Summer 14 for iPad

Set 'Is Billable' field in Work Detail based on Entitlement

Whenever a new Work Detail line is added in any SFM transaction, the value of 'Is Billable' field in the new and existing Work Detail lines is set as follows, based on the values of SET015 & SET016 (module Work Order, submodule Create Work Order Lines VF):

SET015	SET016	Billing Type (Work Order)	Is Billable (Work Detail)
True	N/A	N/A	True
False	N/A	N/A	False
Entitlement	Warranty,Contract	Warranty Or Contract	False
Entitlement	Warranty,Contract	Any value other than Warranty & Contract	True

SET015 - Default Value for Is Billable flag

SET016 - List of Billing Type field values for which Is Billable flag will be false

New App: ServiceMax Winter 15 for Android (Preview Release)

Overview

ServiceMax Winter 15 for Android Phone and Tablets is the latest new app in the ServiceMax's Mobile apps offering. The app is an HTML5 based offline application and brings flawless field service to the growing Android market.

The preview version is a "lite" application that includes some key mobile features. In subsequent releases, the Android app will be comparable in its feature set with other ServiceMax mobile apps, giving you the same field-readiness, flexibility and savings that ServiceMax delivers.

Key Features

- Complete offline application – All actions can be performed regardless of internet connectivity
- Configure once and use everywhere using the SFM framework – Easy mobile configuration that reuses existing SFM Transactions, Wizards, and Searches
- 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
- Robust Synchronization capabilities
 - Scheduled Data Sync – Gets events, related data, and download criteria data
 - Display last sync status and timestamp
 - Manual Configuration Sync – Keep the app's configuration up to date
 - Conflict management – Handles simultaneous updates to the same record
- Easy to use Calendar View
 - At a glance view of your daily and monthly schedule
 - Distinct highlighting for High priority work orders
 - Create and edit events and reschedule events to another available slot
 - Delete locally created events which are not yet synchronized with the server
- Leverages SFM Framework
 - Detailed Work Order View and debrief actions using Service Flow Wizard steps
 - View, edit, create, and delete records
 - Data Validation Rules for enforcing data integrity regardless of connectivity
 - SFM Search (called as Lists) in offline mode

- Integration with device features
 - Google Maps to show current location and plot route for work order location
 - Call and Text to work order Account and Contact from Work Order Summary

Configuration

Server configuration for Android 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.

ServiceMax Suite Issues Fixed in 14.50000.12

Defect Number	Description
SMX015502	<p>Launching Territory Match Rule configuration screen from ServiceMax Setup home failed with the Visualforce error "Maximum view state size limit (135KB) exceeded". Same error returned on selecting a view in Dispatch Console Views configuration screen and clicking View, Clone, or Edit & Quick Save buttons.</p> <p>This happened in orgs having large number of objects and/or large number of fields in Work Order object.</p>
SMX020659	<p>When Work Order events are created in server and synced to iPad app, data sync takes several minutes to get completed.</p> <p>This happens when the value of configuration setting SET011 is 40 and there is large number of Advanced Download Criteria records.</p>

ServiceMax Suite Issues Fixed in 14.50000.9

Defect Number	Description
SMX014265	<p>When a case is created from installed product using SFM from within Salesforce Service Console, the new tab generated is not drawn properly initially; it is redrawn after automatic refresh, causing a few seconds of latent time.</p> <p>Additionally, the Knowledge sidebar and highlights panel are not displayed.</p>

ServiceMax Suite Issues Fixed in 14.50000.4

Defect Number	Description
SMX011157	In Chrome and Firefox browsers, after the address is validated successfully, Validate Address pop-up window is not closed automatically, and the current page is not refreshed.
SMX012921	Manual Case Entitlement returns results only when the language of the logged in user is English.
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 event duration.

Defect Number	Description
SMX013056	In SFM Designer, Page Layout does not retain fields which have the same field label but have distinct API names.
SMX013157	When there are multiple SFM transactions with the same name, only one is displayed for selection in the SFM Wizard Designer configuration screen.
SMX013279	When SVMX.CURRENTRECORDHEADER literal is used with Number, Percent, Currency, Date, or Date Time fields in a value map, SFM Delivery fails with 'undefined' error.
SMX013284	When a checkbox field is set to False in a field map or value map and the related SFM transaction is saved in SFM Delivery, the checkbox field value is set to True. This happens if True is defined as the default value of that field in Salesforce.
SMX013346	When a lookup context field is not a lookup or picklist field, SFM Delivery displays the string 'undefined' as the context field value when lookup search is performed. However, lookup search results are filtered correctly based on the context field value.
SMX013447	Dispatch Console fails to load and throws Script-thrown exception when all the conditions given below are true: <ul style="list-style-type: none"> • Two Work Order fields have partially overlapping API Names. • Both are included in Dispatch Console Field Updates configuration. • These fields are not included in Event Hover Rule configuration.
SMX013052	When a Checkbox field is set automatically (using Formfill, field maps, value maps or web services), Data Validation rules set on the checkbox field do not work.
SMX013531	On upgrade from Winter 14 SP or lower release to Spring 14 or higher release, ServiceMax Configurator records the following error though the seed data is loaded successfully. <pre> Some files were not deployed because of: unpackaged/objects/SVMXC__Service_Order_Line__c.object(SVMXC__Service_Order_Line__c):Cannot set sharingModel to ControlledByParent on a CustomObject without a MasterDetail relationship field unpackaged/objects/SVMXC__RMA_Shipment_Line__c.object(SVMXC__RMA_Shipment_Line__c):Cannot set sharingModel to ControlledByParent on a CustomObject without a MasterDetail relationship field </pre>

Defect Number	Description
SMX013537	<p>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.</p> <p>Note: Fix for this issue introduces setting SET005, Calculate SLA Response Time, under module Service Level Agreement and submodules SLA Clock on Case and SLA Clock on Work Order. These settings need to be set to True to enable the Summer '14 feature SLA Response Time.</p> <p>SET005 is independent of SET003. SET003 controls enabling / disabling of SLA Clocks and SLA internal & customer commit time calculation.</p>
SMX013576	Dispatch Console views that are not associated with any Dispatcher / Technician are not available to any user

ServiceMax Mobile Issues Fixed in 14.50000.9

Defect Number	Description
SMX014714	When an object has more than 100 picklist fields, the values of some of the picklist fields are not displayed in iPad app View Process screen.

ServiceMax Mobile Issues Fixed in 14.50000.4

Defect Number	Description
SMX012171	In ServiceMax Summer 14 for iPhone app, initial Sync fails with error 'SVMXC: Too Many Picklist describes: 101' when an object has more than 100 picklist fields

ServiceMax Summer 14 for iPad Issues Fixed in 14.50.019

Defect Number	Description
SMX018880	<p>In some orgs, logo was not being displayed in both standard and custom service reports, even with default configuration.</p> <p>Note: For this fix to work, do a configuration sync or a reset app after upgrading the app to this version.</p>

ServiceMax Summer 14 for iPad Issues Fixed in 14.50.015

Defect Number	Description
SMX015230	When multiple lines section records are added in offline mode and smart document is generated, datetime fields in all the records display the values entered by the user for the last record.
SMX015541	Source lines such as parts request lines are not getting mapped to target lines such as parts order lines, after the source lines are edited and synchronized to the server.
SMX015599	<p>When images are uploaded from gallery or captured using the iPad camera, the size of the images increases considerably when synchronized to server.</p> <p>All the photos are being converted to 'PNG' format.</p>
SMX015626	With iOS8, it is not possible to enable GPS Location Tracking feature for the iPad app. Even when it is turned on for the app from the device's settings screen, it is getting turned off on launching the app.

ServiceMax Summer 14 for iPad Issues Fixed in 14.50.011

Defect Number	Description
SMX015048	<p>When numeric value with decimal point is entered / edited, the value is saved as a whole number and the decimal point is not considered. For example, value entered as 3.75 is being saved as 375. This happens in all Create / Edit transactions.</p> <p>Note: This issue is specific only to iPad app version 14.50.010 and not the prior versions.</p>

ServiceMax Summer 14 for iPad Issues Fixed in 14.50.010

Defect Number	Description
SMX013998	In iOS 8.0.x, downloading and viewing of records does not work consistently from the Search Results screen. Tapping the < button to navigate back to the previous screen causes the app to crash at times.
SMX014239	Duplicate records get created on sync when a record which fails to sync because of a server error is updated again from the client.
SMX014278	Saving a record with a value greater than or equal to 1000 in a currency field fails with the error 'Invalid decimal'. This happens when the Region Formats settings Region and Language in iPad are set to France and French, resulting in thousands separator of space. With Germany and German (thousands separator of dot), the value saved is incorrect.

ServiceMax Summer 14 for iPad Issues Fixed in 14.50.001

Defect Number	Description
SMX012287	In iPad app calendar's Day view and Week View, the word 'Noon' is displayed for all languages instead of the more universally acceptable substitute '12 PM'.
SMX013256	Images newly added to Smart Docs are not reflected in iPad app after configuration sync.
SMX013424	Incorrect value is displayed for date fields in Smart Docs. The value displayed is +/- 1 day from the actual date when iPad device's time zone is not UTC.
SMX013436	The iPad app does not display some events scheduled during the start or end of the day depending on the iPad device's time zone.

ServiceMax Mobile for Laptops Issues Fixed in this Release

Defect Number	Description
SMX012369	Japanese characters are not accepted for input and are not synchronized to the client when entered online.
SMX013242	When a record created in the client app and successfully synchronized to server is updated in client and synchronized again, the updates get rolled back inconsistently.
SMX013319	Double clicking a Work Order event in calendar makes the application go into constant sync mode, instead of opening the work order for view.
SMX013332	When an object downloaded to the app has more than 500 record types and SFM expressions include 'Record Type ID', the related SFM wizards, wizard steps, and SFM transactions are not displayed in some scenarios. When this issue occurs, newly added record in child section gets created with default Record Type ID, instead of with the value defined in the value map.
SMX013336, SMX013444	When the number of new / updated records matching the advanced download criteria is higher than 40000, sync gets stuck at around 75% (step 10 of 14)
SMX013365	Initial sync fails between stages 10 and 14 of 14, when connecting through VPN and Proxy Server.
SMX013346	When a lookup context field is not a lookup or picklist field, SFM Delivery displays the string 'undefined' as the context field value when lookup search is performed. However, lookup search results are filtered correctly based on the context field value.

Known Issues/Limitations in ServiceMax Suite

Location-based Preventive Maintenance Plans

- PM plans without valid coverage cannot be activated. However, any activation notes entered will be retained in the PM plan.
- It is not possible to create location based PM Plans from Installed Product
- Adding a PM Schedule Definition to an existing PM plan (using one of the Manage PM Plan process) does not create corresponding PM Schedule record. This applies for both Product based and Location based PM plans.

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, 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)

Known Issues/Limitations in ServiceMax Mobile for Laptops

Locale Support

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

Known Issues/Limitations in ServiceMax Summer 14 for iPad

12-hour time format support

The iPad app (version 14.50.019) does not support the 12-hour time format. The time format on the device should be set to 24-hour time format.

Data Purging

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

Attachment Sharing

In iOS 8.0.x, print option is disabled in the iOS Share Sheet displayed while sharing attachments

Download on Demand

In iOS 8.0.x, downloading and viewing of records does not work consistently from the Search Results screen. The following workaround is recommended.

- To download a record: Tap the required record to open the Search Display screen. Tap the download icon in the Search Display screen.
- To view a downloaded record: Tap the required downloaded record to open the Search Display screen. Tap the disclosure button in Search Display screen

Known Issues/Limitations in ServiceMax Summer 14 for iPhone

The following features are not supported:

- Scheduled Configuration Sync and Custom web service Sync
- Advanced Conflict resolution for handling field level merges
- SFM search with Include Online results option and Download on Demand for such records
- Context sensitive Lookups, Advanced lookup filters, and Form Fill
- Other features: SLA Clock, Linked SFMs, Data Purge, Attachment, Location Tracking

Known Issues/Limitations in ServiceMax Winter 15 for Android

The following features are not supported:

- Scheduled Configuration Sync and Custom web service Sync
- Advanced Conflict resolution for handling field level merges
- SFM search with Include Online results option and Download on Demand
- Smarts Docs
- Filters in Lookups and Form Fill
- Sorting in SFM Search and SFM transactions
- Literals in SFM Search
- Other features: SLA Clock, Linked SFMs, Data Purge, Attachments, Location Tracking