

ServiceNow Field Service Management (FSM) Implementation

Duration: 2 Days Course Code: SNFSMI Delivery Method: Company Event

Overview:

ServiceNow® Field Service Management (FSM) helps companies efficiently manage location-based work tasks. Field Service Management Implementation focuses specifically on field service management applications and related functionality, most of which may be configured during an implementation using a low-code or no-code approach. Field Service Management Implementation provides practical skills to accelerate field service management implementations.

Target Audience:

The ServiceNow® Field Service Management Implementation course is for Customers, Partners, and Employees who implement features, functions, and data associated with field service management.

Objectives:

- In this two-day interactive course attendees gain the skills for the effective implementation of the ServiceNow Field Service Management application. This course is designed for Implementation Specialists responsible for set-up and configuration of the Field Service Management applications. A combination of lecture, group discussions, group activities, and lab work helps attendees develop skills to achieve the following:
 - Configure central dispatch and dynamic scheduling
 - Automate transfer order line task assignment using flow designer
 - Configure appointment booking service
 - Configure advanced time recording and time sheet policy
 - Create a targeted communication
 - Configure contextual knowledge for work orders and work order tasks
 - Configure field service mobile application
- Validate foundational data
- Analyze and implement customer business requirements
- Use industry good practice for field service management implementation
- Discuss common field service management integration scenarios and good practices
- Set-up field service business and assignment configuration
- Configure work order form and mandatory skills
- Create advanced maintenance plans and maintenance schedules

Prerequisites:

- SNF - ServiceNow Fundamentals
- SNFSMF - ServiceNow Field Service Management (FSM) Fundamentals

Content:

1: Field Service Management Implementation Planning

- FSM features, process, and data review
- Field service industry good practices
- FSM implementation good practices
- Process Integrations
- Foundation data planning

Lab 1.1 Prepare to Implement Field Service Management

Module 2: Implementing Field Service Processes

- Validate Foundation Data
- Configure Field Service Process, Assignment, and Add-ons
- Configure Work Order Creation
- Configure Time Recording

Lab 2.1 Validate Foundation Data

Lab 2.2a Configure Approval Workflow

Lab 2.2b Field Service Configuration

Lab 2.3a Configure Mandatory Skills

Lab 2.3b Create a Work Order Template

Lab 2.4 Create an Advanced Maintenance Plan

Lab 2.5 Configure Advanced Time Recording

Module 3: Optimizing Inventory ; Scheduling Operations

- Scheduling and Dispatch Configurations
- Dynamic Scheduling Configuration
- Parts Sourcing and Transfer Process automation

Lab 3.1a Configure Central Dispatch

Lab 3.1b Configure Dynamic Scheduling

Lab 3.2 Automate Transfer Order Line Task Assignment using Flow Designer

Module 4: Implementing Field Service Mobile

- Agent Mobile Application Overview
- Field Service Mobile Configurations
- Mobile Migration Considerations

Lab 4.1 Configure VIP Tasks Applet

Module 5: Implementing Related Processes

- Customer Experience Configurations
- Appointment Booking Configuration
- Configure Targeted Communications
- Configure Field Service Knowledge Base and Contextual Search

Lab 5.1a Configure Appointment Booking

Lab 5.1b Appointment Booking – Advanced Availability Configuration

Lab 5.2 Create a Targeted Communication and Notification

Lab 5.3 Configure Contextual Knowledge for the Field Service Knowledge Base

Further Information:

For More information, or to book your course, please call us on 00 971 4 446 4987

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