

SERVICENOW FIELD SERVICE MANAGEMENT (FSM) IMPLEMENTATION

Course Code: 821236

Learn the practical skills to accelerate field service management implementations.

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.

What You'll Learn

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:

- 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
- 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

Who Needs to Attend

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

Why Global Knowledge



SERVICENOW FIELD SERVICE MANAGEMENT (FSM) IMPLEMENTATION

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CLASSROOM LIVE

\$1,900 USD

2 Day

Classroom Live Outline

Module 1: Field Service Management Implementation Planning

Topics:

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

Labs:

- Lab 1.1 Prepare to Implement Field Service Management

Module 2: Implementing Field Service Processes

Topics:

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

Labs:

- 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

Topics:

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

Labs:

- 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

Topics:

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

Labs:

- Lab 4.1 Configure VIP Tasks Applet

Module 5: Implementing Related Processes

Topics:

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

Labs:

- 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

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VIRTUAL CLASSROOM LIVE

\$1,900 USD

2 Day

Virtual Classroom Live Outline

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Labs:

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Jun 11 - 12, 2025 | 9:00 AM - 5:00 PM CDT

SERVICENOW FIELD SERVICE MANAGEMENT (FSM) IMPLEMENTATION

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ON-DEMAND

\$0 USD

On-Demand Outline

Welcome to Field Service Management Implementation On Demand!

- Welcome to Field Service Management Implementation On Demand!
- Request Participant Guide
- Request a Lab Instance
- Instance Help

Module 1 - Implementation Planning

- Field Service Management Solution Review Knowledge Check
- Prepare for a Field Service Management Implementation
- Organizational Change Management - Optional Video
- Contributors to a Successful Field Service Management Implementation
- Foundational Field Service Data and Relationships
- Foundational Field Service Data and Relationships - Demo

Module 2 - Implement Field Service Processes

- Field Service Configuration Options
- Field Service Configuration Options - Demo
- Configure and Manage Field Service Skills
- Configure and Manage Field Service Skills - Demo
- Field Service Work Order and Task Templates
- Field Service Work Order and Task Templates - Demo
- Work Order Templates - Debrief
- Field Service Questionnaires
- Field Service Questionnaires-Demo
- Planned Maintenance for Field Service
- Planned Maintenance for Field Service - Demo
- Advanced Time Recording for Field Service

- Advanced Time Recording for Field Service - Demo
- Optional Lab - Create a Time Sheet

Module 3 - Optimize Scheduling and Dispatch Operations

- Work Order Scheduling and Dispatch Operations
- Work Order Scheduling and Dispatch Operations - Demo 1
- Work Order Scheduling and Dispatch Operations - Demo 2
- Dynamic Scheduling Configuration
- Dynamic Scheduling Configuration - Demo 1
- Dynamic Scheduling Configuration - Demo 2
- Dynamic Scheduling Configuration - Debrief
- Field Service Part Sourcing and Transfer Automation
- Field Service Part Sourcing and Transfer Automation - Demo
- Part Sourcing and Transfer Automation - Debrief

Module 4 - Implement Related Processes

- Appointment Booking Configuration
- Appointment Booking Configuration - Demo
- Appointment Booking Configurations - Debrief
- Targeted Communications
- Targeted Communications - Demo
- Field Service Knowledge
- Field Service Knowledge - Demo
- Field Service Knowledge - Debrief
- Field Service Customer Experience Configuration Options
- Field Service Customer Experience Configuration Options - Demo
- Field Service Mobile Configuration Options

FSM Implementation Course Appendices

- Certified Implementation Specialist – Field Service Management Voucher Info

On-Demand Labs

- Lab - Prepare for Class Labs and Activities
- Lab - Validate Foundational Data
- Optional Labs - Explore Field Service Modules
- Lab - Configure Work Order Approval Workflow
- Lab - Field Service Configuration Settings
- Lab - Manage Skills
- Lab - Create a Work Order Template
- Lab - Create a Questionnaire
- Lab - Create an Advanced Maintenance Plan
- Lab - Configure Advanced Time Recording
- Lab - Configure Scheduling and Dispatch Tools
- Lab - Configure Dynamic Scheduling
- Lab - Automate Transfer Order Line Task Assignment
- Optional Lab - Configure Mandatory Skills

- Lab - Configure an Appointment Booking Service
- Lab - Configure Advanced Appointment Availability
- Lab - Create a Targeted Communication
- Lab - Configure Contextual Knowledge
- Optional Lab - Use the Now Agent Mobile Application



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PRIVATE GROUP TRAINING

2 Day

Visit us at www.globalknowledge.com or call us at 1-866-716-6688.

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