Teamcenter Service Lifecycle for SFDC - User Guide

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1. Introduction

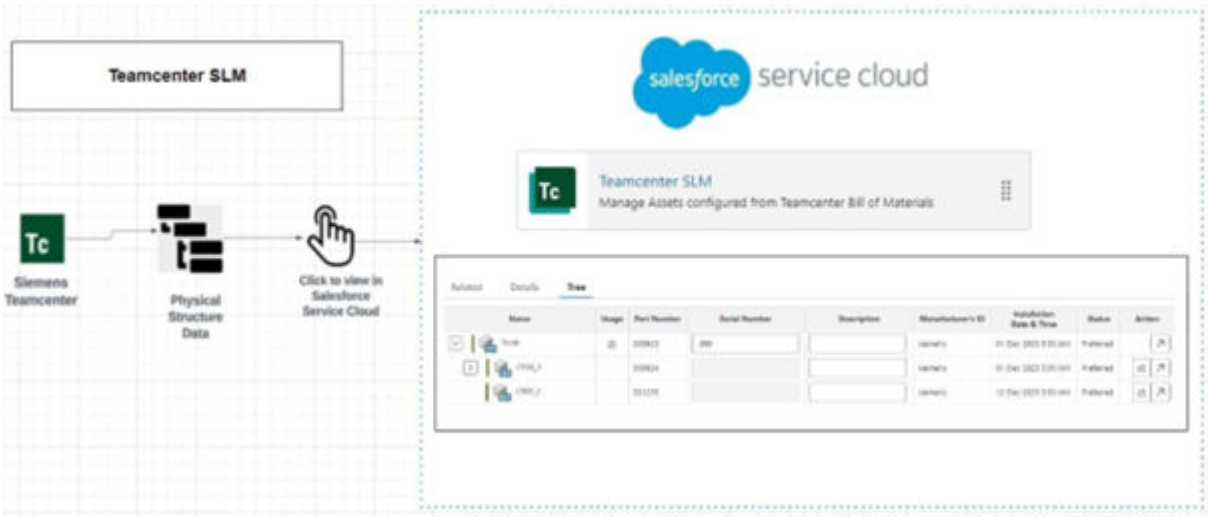
Teamcenter SLM is an innovative app designed to enhance your service management capabilities within Salesforce Service Cloud. This comprehensive solution brings together the power of Salesforce Service Cloud with advanced service lifecycle management functionalities. By integrating seamlessly with the Salesforce environment, Teamcenter SLM enables you to optimize your service operations, improve customer satisfaction, and drive business growth.

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2. Application workflow

The diagram shows the workflow beginning within **Teamcenter SLM**, a powerful and innovative solution that bridges the gap between Teamcenter's product lifecycle management (PLM) capabilities and **Salesforce Service Cloud** platform. This app seamlessly integrates engineering data and servicing information from Teamcenter, providing a digital thread that connects the entire product lifecycle. The diagram visually represents how a user can initiate this transfer by clicking **View in Salesforce Service Cloud**, transforming Teamcenter's Service Bill of Materials (SBOM) into the creation of configured assets in the Salesforce environment. These assets hold comprehensive information about the product configuration and its history, empowering customer service representatives with valuable insights to deliver top-notch support.



Moreover, the app utilizes the servicing information defined in Teamcenter to generate standardized work type templates in Salesforce, streamlining service processes and ensuring consistent and efficient handling of customer cases. Beyond these capabilities, users can personalize date formats and language settings to their preferences, enhancing data presentation, analysis, and user experience. Additionally, the app introduces 3D visualization, allowing users to interact with assets in a three-dimensional format for improved understanding and analysis, thereby revolutionizing customer service operations and fostering collaboration between engineering and service teams. Ultimately, it drives enhanced customer satisfaction by delivering the right information at the right time.

Accessing the Home tab

Upon logging into the Salesforce app, the Home tab opens.

This tab displays an embedded Active Workspace interface using an iframe, making Teamcenter data readily accessible right where you need it.

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Interacting with Active Workspace

You can now engage directly with Active Workspace features within the iframe.

Active Workspace makes HTTP requests to Teamcenter microservices to fetch essential engineering and servicing information.

Active Workspace first authentication

For your security and data integrity, if you have not already authenticated, Active Workspace will securely prompt you to log in.

Your credentials will be validated against Teamcenter using HTTP requests, ensuring proper access to your engineering data.

Initiating asset generation

Navigate to the **Folders** tile within Active Workspace.

Here, you have the flexibility to either select an existing part or create a new one. After you identify the desired part, click **Generate Assets**. This action initiates the secure connection between Teamcenter and Salesforce.

Data retrieval from Teamcenter

Following successful authentication, Active Workspace retrieves all relevant engineering and servicing data from Teamcenter.

Active Workspace communicates with Salesforce using HTTP requests to transfer the fetched data.

Salesforce to Teamcenter authentication

To ensure secure and authorized communication, Salesforce will prompt you to log in and establish a dedicated connection with Teamcenter, if not already authenticated.

Asset creation in Salesforce

After successful authentication, Salesforce receives data from Active Workspace.

Salesforce processes the received data and proceeds to create assets within the Salesforce environment.

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Displaying the new asset

Immediately after creation, your newly generated asset will be displayed in a new tab within Salesforce.

Integrating into service workflow

The newly created assets in Salesforce are now fully integrated into the service workflow.

This seamless integration significantly streamlines service processes.

Consistent user experience

The embedding of Siemens Teamcenter Active Workspace directly within Salesforce ensures a truly consistent and uninterrupted user experience.

You can effortlessly transition between Active Workspace and Salesforce, boosting productivity.

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3. Functionalities

This integration empowers you with a suite of functionalities to manage your services.

Generate assets in Salesforce

Create fully configured assets in Salesforce directly from your Teamcenter data, ensuring data consistency.

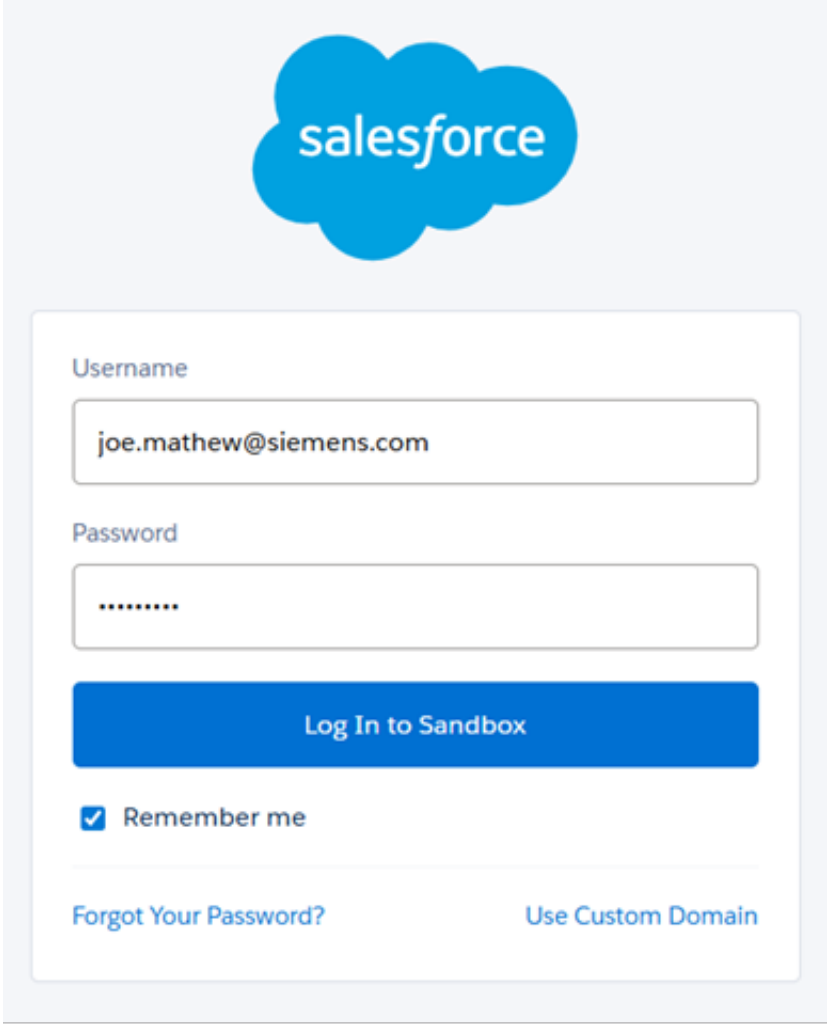
Procedure

1. Open Salesforce website at **https://test.salesforce.com/**.
2. Enter your username and password, then click **Log In to Sandbox**.

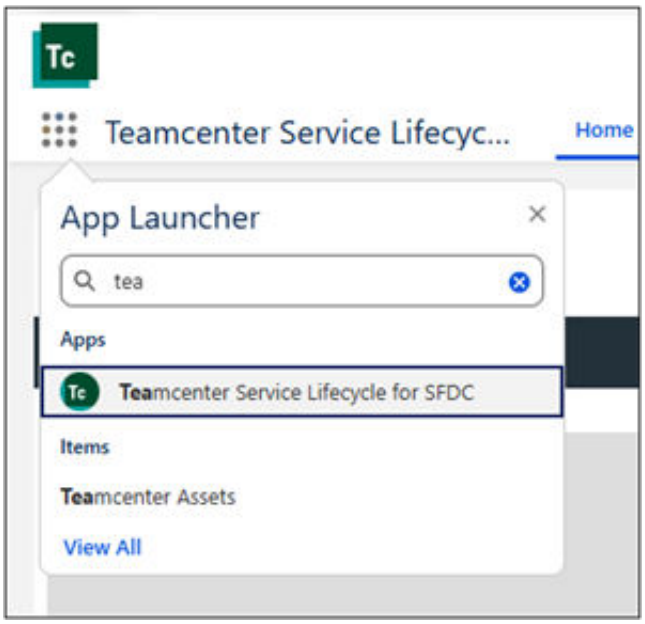
   Note

   Contact your Salesforce administrator for role-specific credentials if you do not have access.

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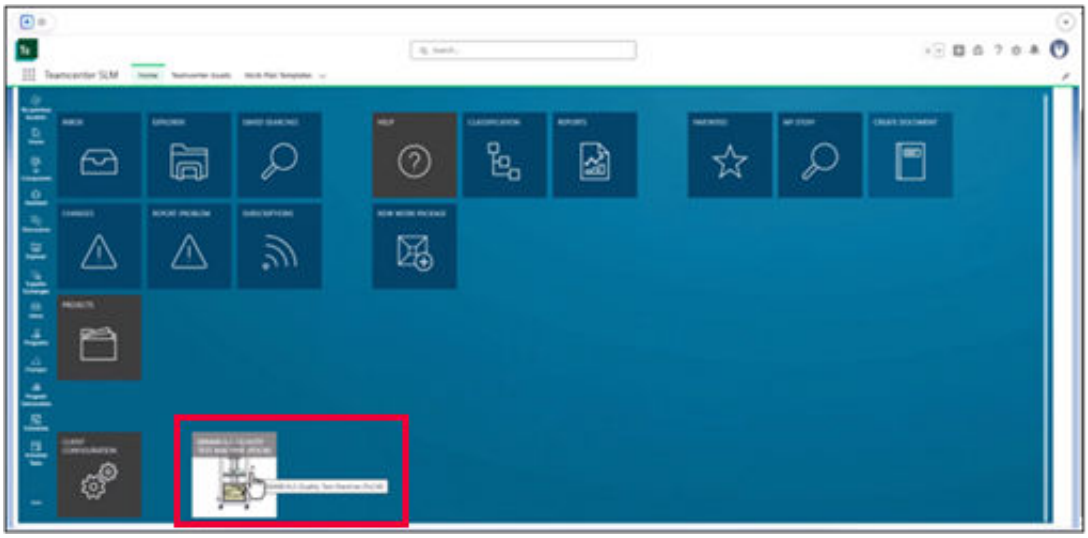
3. Click **App Launcher** and open **Teamcenter Service Lifecycle for SFDC**.



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The Teamcenter Active Workspace embedded view opens on the Home page.

4. In the Teamcenter Active Workspace embedded view, enter your Teamcenter credentials and click **Login**.
   The Teamcenter Active Workspace Gateway page opens.
5. In the Global search box, type **Quality Test Machine** and click on it.



The Bill of Material for **Quality Test Machine** opens.

6. Click **Generate Asset**.
7. In the **Generate Asset** dialog box, enter the required details and click **Generate**.

   Required fields include:
   - **Serial Number** - Unique identifier for the asset
   - **Manufacturer's ID** - Unique manufacturer identifier
   - **Account** - Select the associated account
   - **Contact** - Select the primary contact
   - **Location Name** - Enter the installation location
   - **Manufacturing Date** - Enter the manufacturing date
   - **Installation Date** - Enter the installation date

   Note

   Once the asset is generated, an automated workflow is triggered to export the spares associated with the Teamcenter neutral BOM to Salesforce, and you receive a Salesforce notification. With this workflow, only released spares are exported to Salesforce.

   The task to generate the asset is created.
8. After the asset is generated, you receive a notification.

   The asset is displayed in the **Teamcenter Assets** tab in Salesforce.

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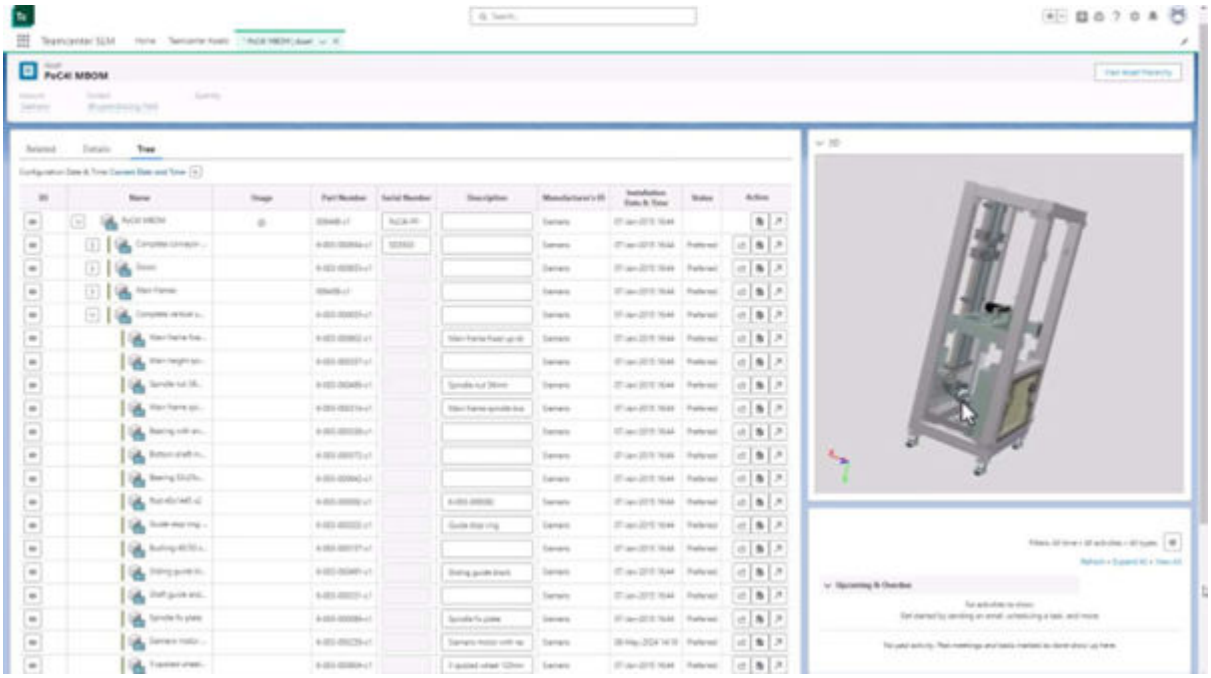
9. To create multiple assets, in the **Generate Asset** dialog box, click + button to add the number of asset copies required.

> **Note**
>
> When generating multiple assets, ensure the Serial Number and Manufacturer's ID combination is unique to avoid errors.

10. After entering all the details, click **Generate**.
Multiple assets are created, and a notification displays all details for the generated assets.

3D visualization of asset

The 3D visualization allows you to interact with assets in a three-dimensional environment for detailed understanding and analysis.



Procedure

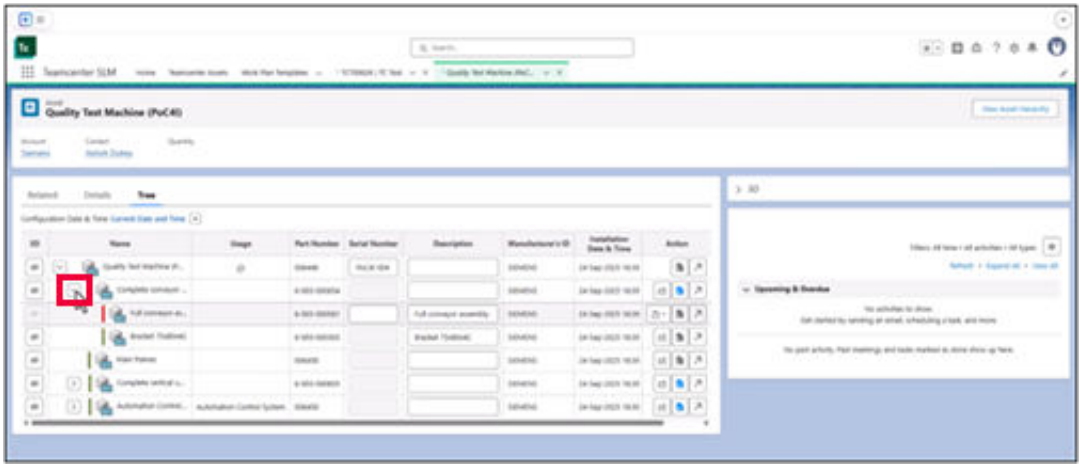
1. In Salesforce, navigate to **Teamcenter Assets** tab within **Teamcenter Service Lifecycle for SFDC**.
2. Select the asset you want to visualize.

> **Tip**
>
> Select the top line to display the entire asset. Select a single part line of the asset to display only that specific component.

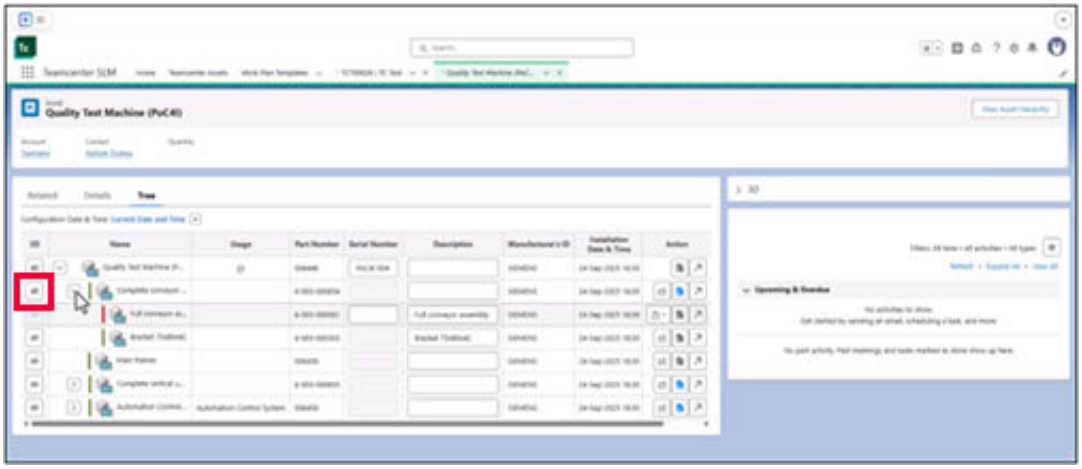
3. After selecting an asset, go to the **Tree** tab.

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4. Expand the nodes to view the details of the parts.



5. Click the **eye** icon next to parts to load the 3D view in the right-side panel.



You can use the eye icon to show or hide parts.

> **Note**
>
> Within the 3D viewer, you can easily navigate and manipulate the asset using standard controls, such as zoom, rotate, and pan.

Update serial numbers for missing parts

Add serial numbers for parts that are missing this information to ensure complete asset tracking and identification.

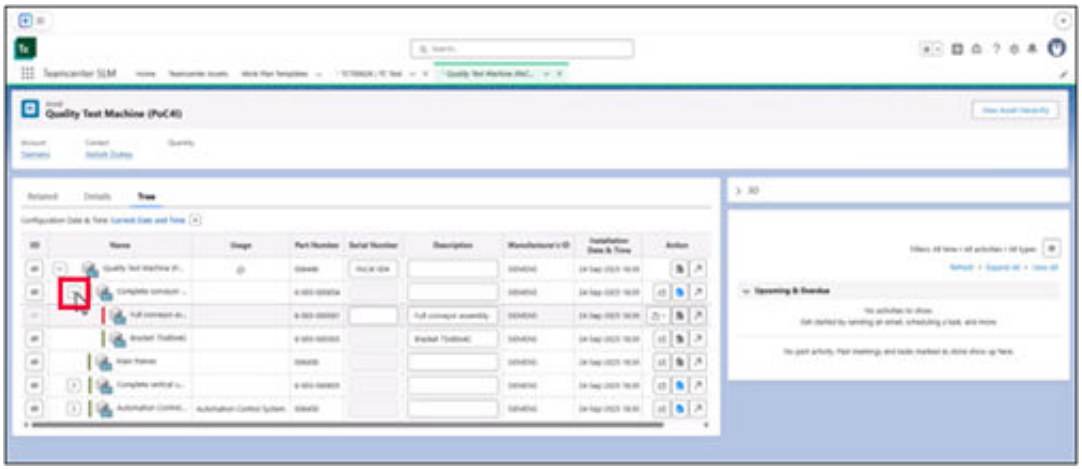
Procedure

1. In Salesforce, navigate to **Teamcenter Assets** tab within **Teamcenter Service Lifecycle for SFDC**.
2. Select the asset you want to view.

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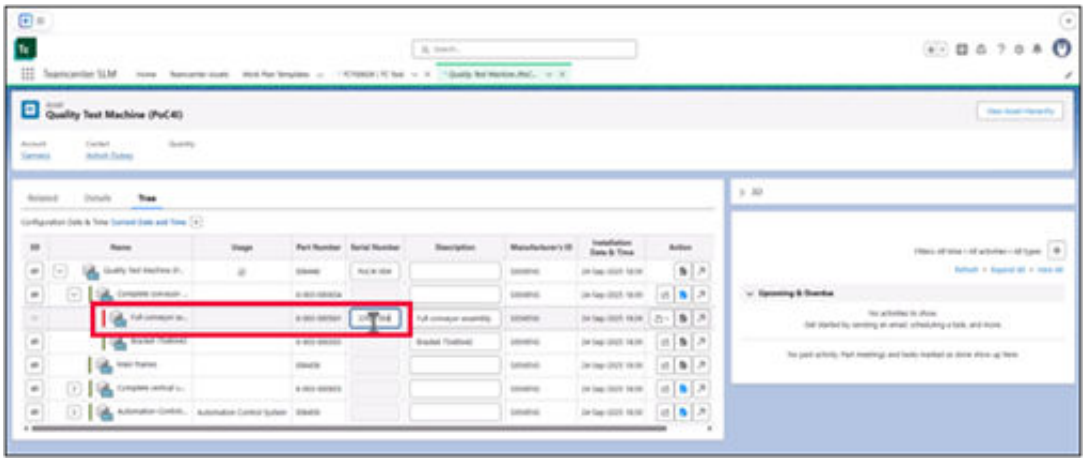
3. Click the **Tree** tab.

   You can expand the nodes to view part details.



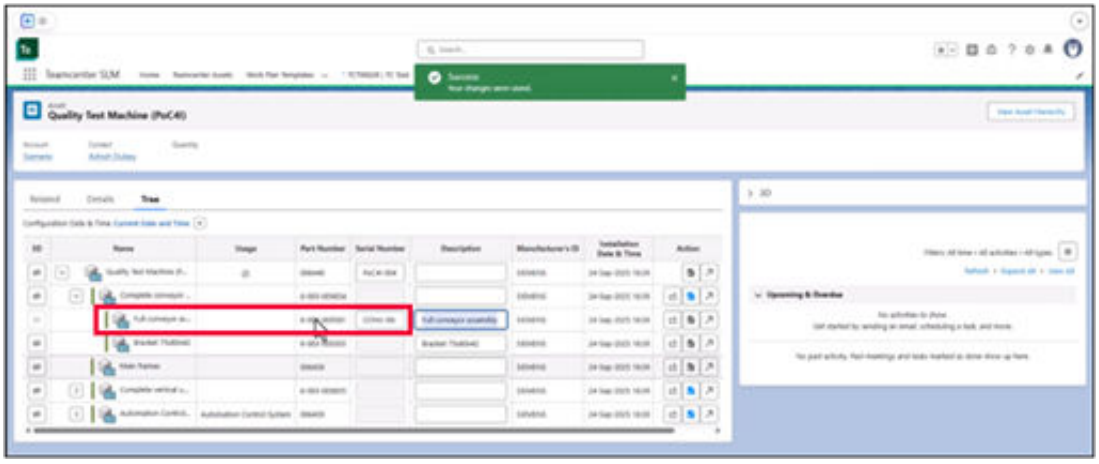
> **Note**
>
> Parts with missing serial numbers are marked in red.

4. Enter the required serial number for the missing part and press **Enter**.



After adding the serial number for the part, the part color changes to green.

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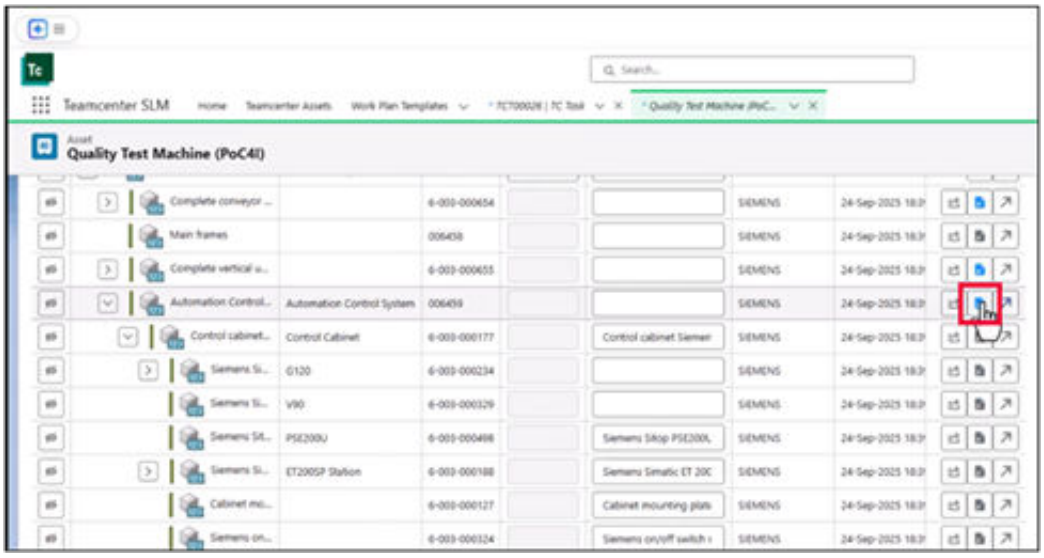


View knowledge articles

Access knowledge articles associated with specific parts to view detailed technical information.

Procedure

1. In Salesforce, navigate to the **Teamcenter Assets** tab within **Teamcenter Service Lifecycle for SFDC**.
2. Select the asset you want to view.
3. Go to the **Tree** tab.
4. Expand the nodes to navigate to the required part, and then click the **Knowledge Article** button.



5. In the **Articles** dialog box, click the knowledge article.

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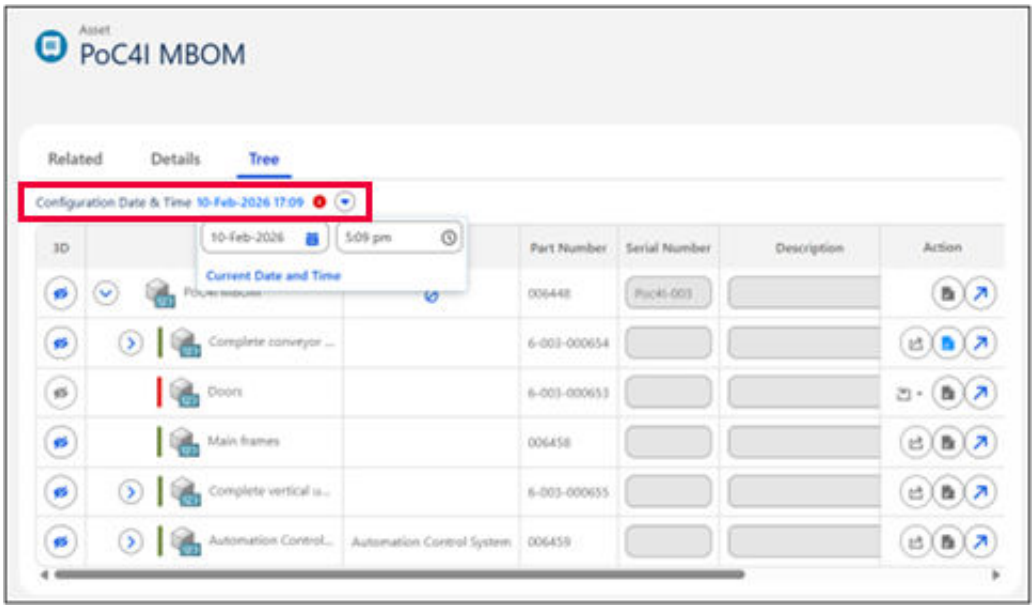
The knowledge article opens with detailed information.

View asset configuration by date

Personalize date formats to view the historical configuration of an asset at a specific date and time. This allows you to track changes or verify configurations from previous periods for enhanced data presentation and analysis.

Procedure

1. In Salesforce, navigate to the **Teamcenter Assets** tab within **Teamcenter Service Lifecycle for SFDC**.
2. Select the asset for which you want to view the configuration.
3. Go to the **Tree** tab.
4. From the **Configuration Date & Time** list, select the date and time to check the configuration from last month or any specific date.



The system displays the asset configuration that existed at the selected date.

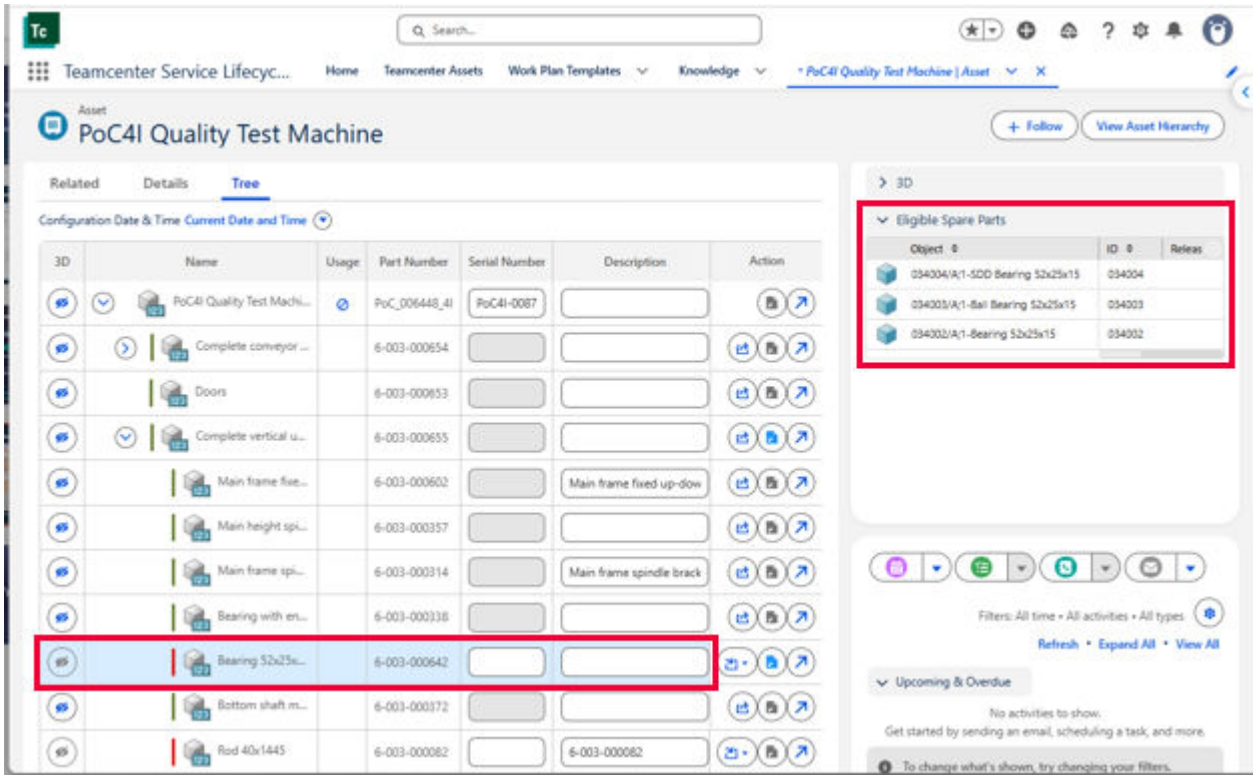
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View eligible spare parts

You can view the spare parts that are associated with the selected part in the asset hierarchy.

This feature is available only with Teamcenter version 2612 and later.

When you select a part in the asset hierarchy, the system displays its associated Teamcenter spare parts in the Eligible Spare Parts section. This lets you quickly identify which spare parts are relevant to the selected asset part.



Export Teamcenter spares to Salesforce for product pricing

You can now export spare parts data from Teamcenter to Salesforce and assign pricing for the product.

Procedure

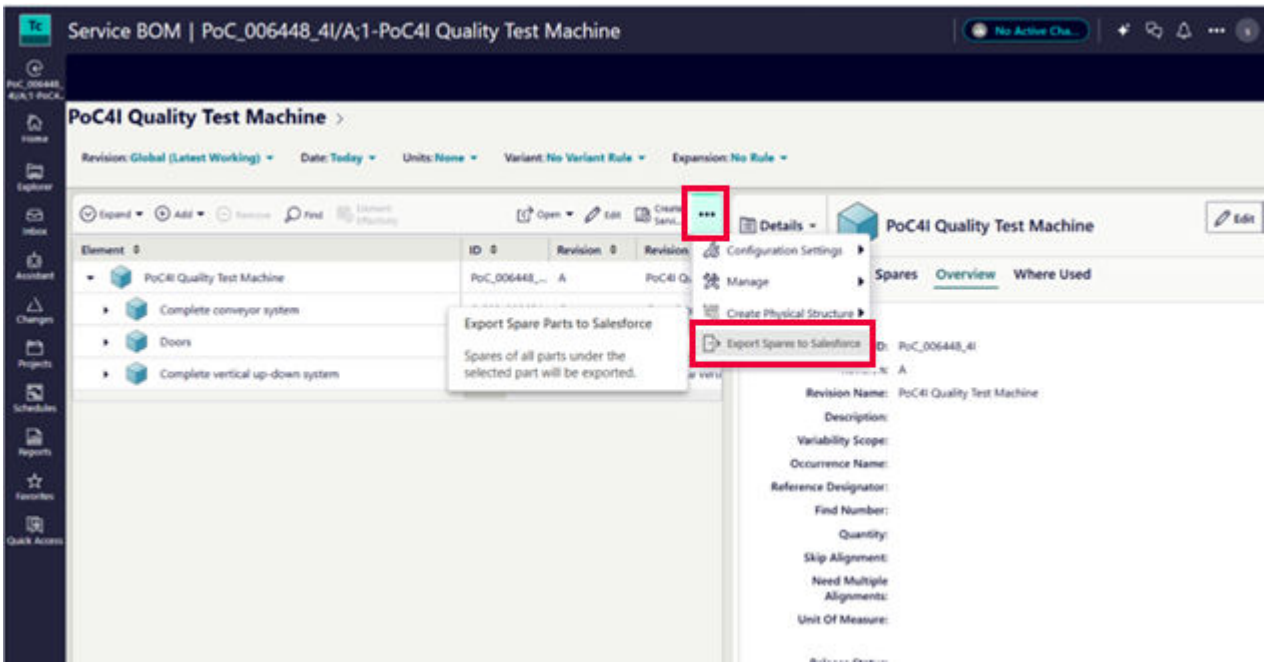
1. Log on to Teamcenter Active Workspace.

   Ensure that **Role** is set to **Service Engineer** and **Workspace** is set to **SBOM Management**.
2. Search for and select the required SBOM.
3. Open the Service BOM view by doing one of the following:

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- In the **Details** view, on the **Overview** tab, click **Manage Service BOM** .
- From primary toolbar, click **More Commands** > **Manage** > **Manage Service BOM** .

4. Select the required part from the structure, and click **More Commands** > **Export Spares to Salesforce** from the primary work area toolbar.



After the export is complete, you receive a Salesforce notification with the export details.

Note

- With **Export Spares to Salesforce**, spares for the selected part and its child parts are exported to Salesforce.
- Only released spares are exported to Salesforce.
- If you run **Export Spares to Salesforce** again, only updated spares are exported.

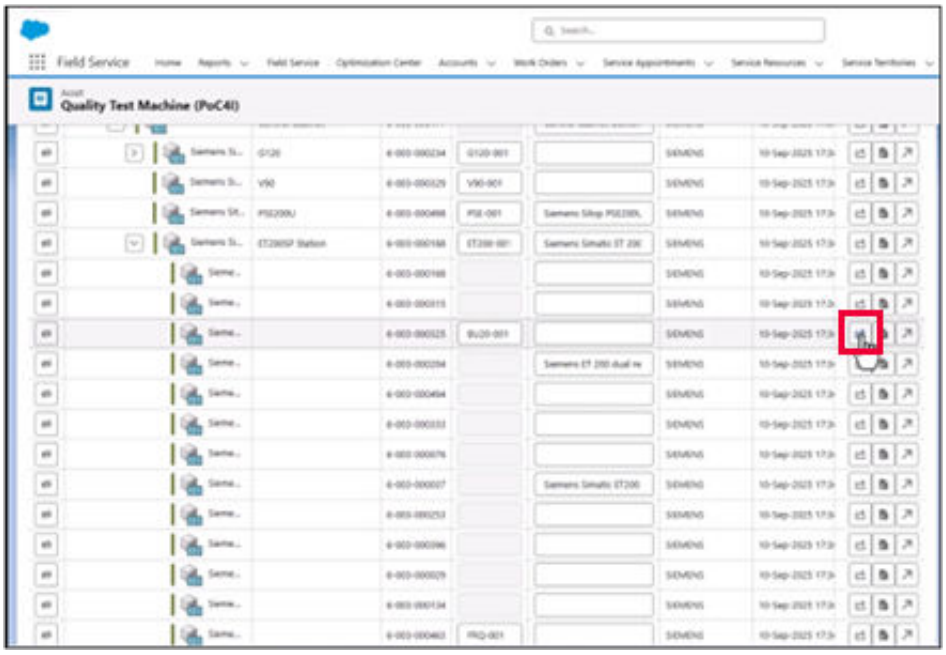
Move parts between assets

Track your asset's location, installation, and uninstallation timelines, ensuring accurate service records.

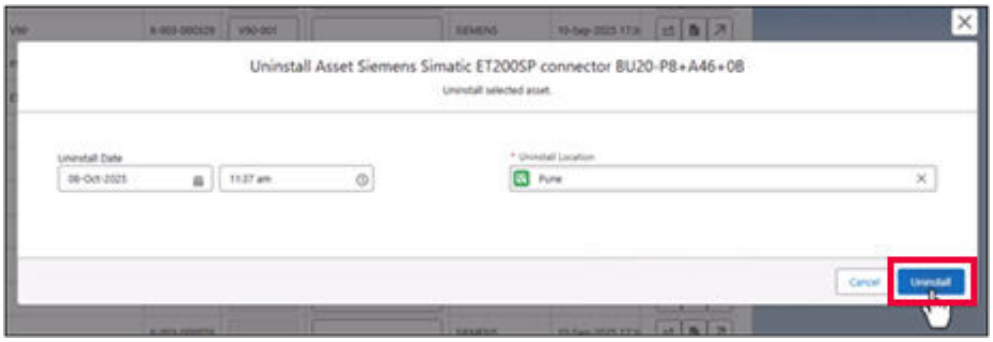
Procedure

1. In Salesforce, open the asset and go to the **Tree** tab.
2. Navigate to the part that you want to uninstall.
3. Click **Uninstall**.

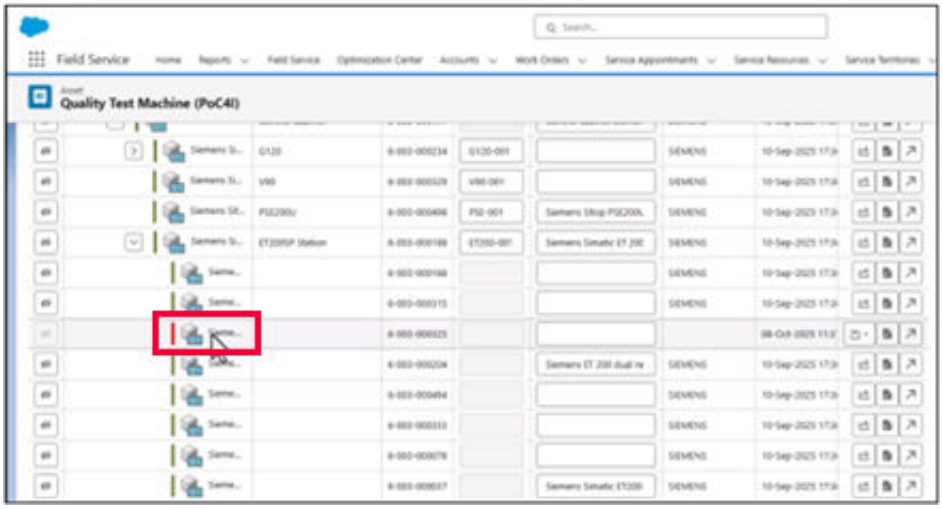
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4. In the **Uninstall Asset** dialog box, enter the **Uninstall Date** and **Uninstall Location**, and then click **Uninstall**.

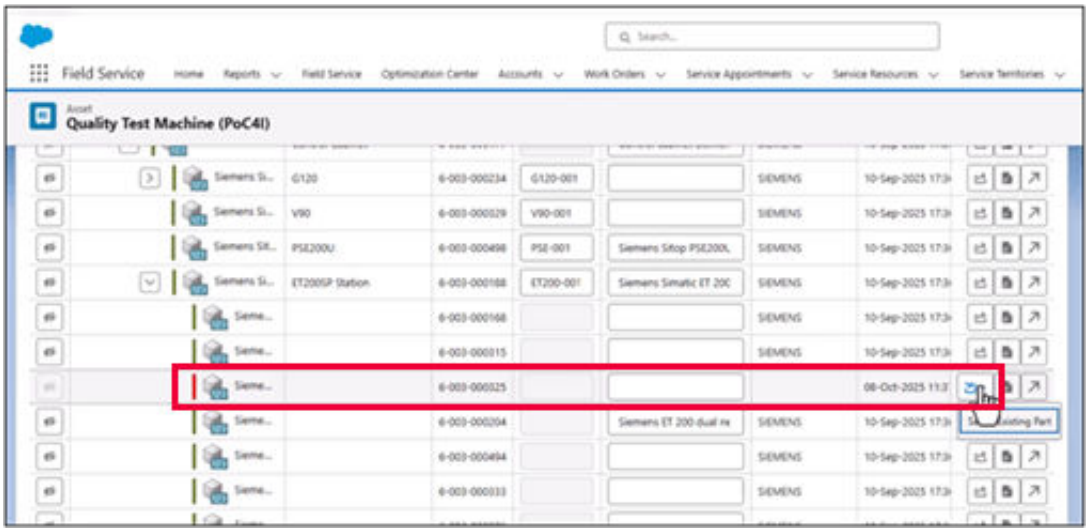


The uninstall part is marked in red.

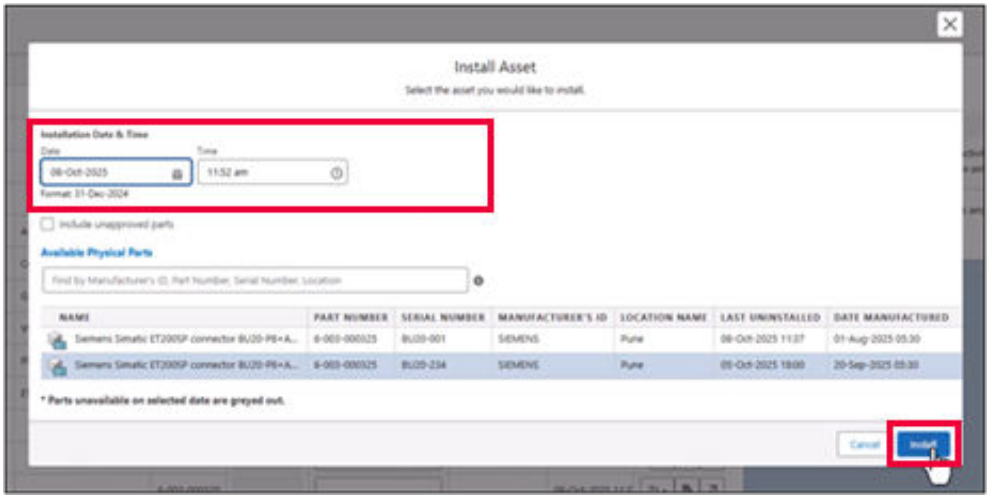


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5. In the **Tree** tab, navigate to the part where you want to install a replacement.
6. Click **Install**.



7. In the **Install Asset** dialog box, enter the **Installation Date and Time**, select the required part from the available physical part list, and then click **Install**.

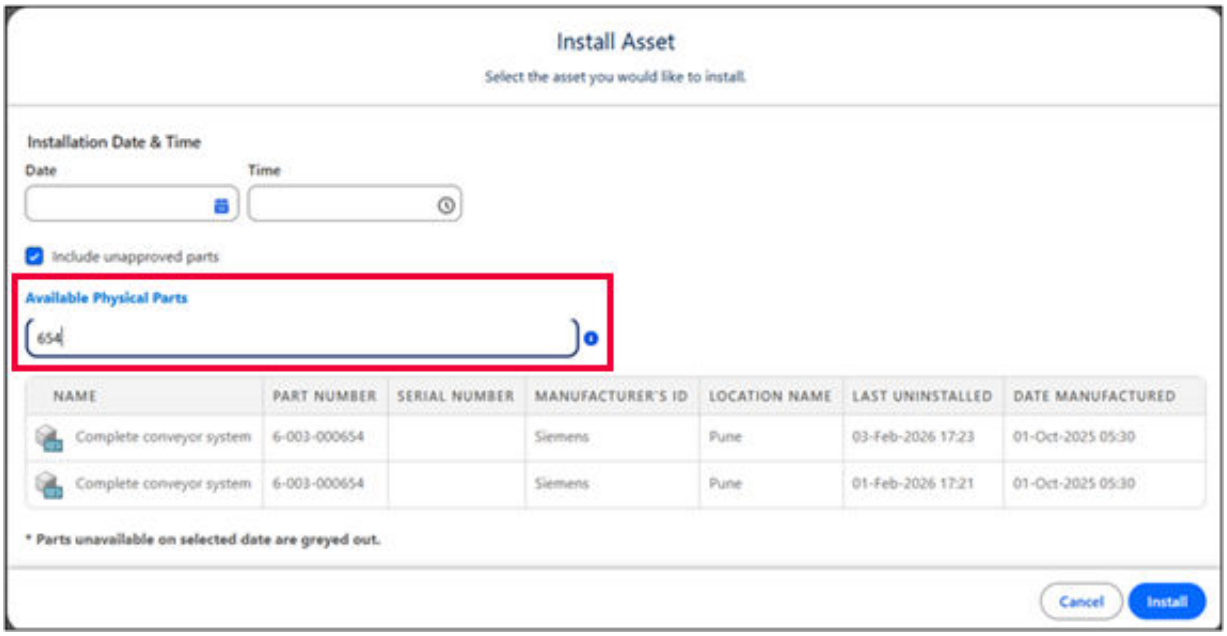


The installed part is marked in green.

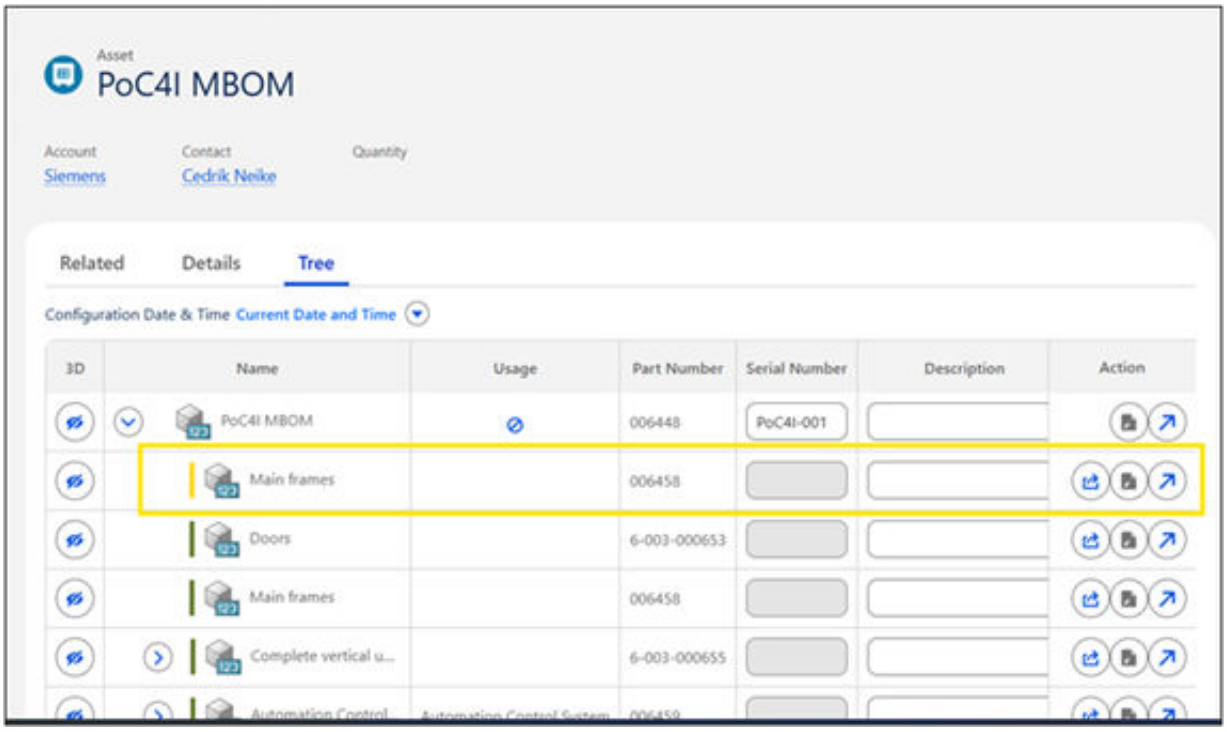
8. To filter installable parts, select the asset and click **Install**.
9. In the **Install Asset** dialog box, apply the required filter and select the part to install.

   You can filter parts by **Serial Number**, **Manufacturer's ID**, or **Part Number**.

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If you install a part that does not match the uninstalled part, it appears as a deviated part and is marked in yellow.



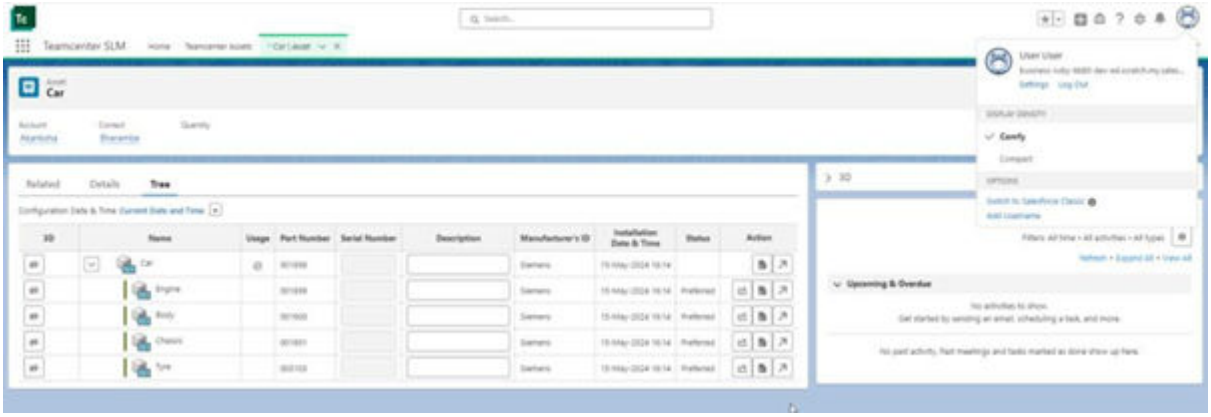
Set the application language

Change the application language settings to display the user interface and content in your preferred language.

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Procedure

1. On the **Home** page, click the **Profile** icon, and then select **Settings**.



2. Under **My Personal Information**, select **Language & Time Zone**.
3. Select your desired language from the list, and then click **Save**. (You can keep the other settings as they are.)
   The application displays the user interface and assets in the selected language.

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