

Client Information Center

- [Introduction](#)
- [Client Information Center](#)
- [Open CSR Document](#)
 - [Open CSR document Header](#)

Introduction

Client Information Center

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:-

01/09/2023 - 10/10/2024

Users(Usage/Limit):-

0/0

Current Release:-

Current

Last Updated:-

12/10/2023 18:45:48

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Account No	Client Name	Client Sponsor	Client Co-ordinator	OA Number	OA Description	ERP Status
Konnect ERP Account No:- KACC/500014/23-24	Sandbox			KA-ORD/08048/23-24		

Download

Product	Module	Valid From	Valid To
Konnect ERP	General Modules		
Konnect ERP	Sales		
Konnect ERP	Pre-Sales CRM		
Konnect ERP	Purchase		
Konnect ERP	Inventory		
Konnect ERP	Quality Control		
Konnect ERP	HR & Payroll		

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Profile Refreshed

Profile Refreshed

Profile:-

The current Subscription pack of Konnect ERP is displayed with information on the purchased modules and other services like Training days,no of users,Printformats and reports.

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:-

01/09/2023 - 10/10/2024

Users(Usage/Limit):-

0/0

Current Release:-

Current

Last Updated:-

12/10/2023 18:45:48

No - KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Product	Name	Start Date	End Date	Order No	Amount	Remarks
Konnect ERP	Core1 - Konnect ERP Cloud Subscription (Upto 10 Users)	11/10/2023	10/10/2024	KA-ORD/08051/23-24	50,622.00	

Download

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Subscription Refreshed

Subscription Refreshed

Subscription:-

All subscriptions and subscription amounts are available in this tab

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:-

01/09/2023 - 10/10/2024

Users(Usage/Limit):-

0/0

Current Release:-

Current

Last Updated:-

12/10/2023 18:45:48

No - KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Order Date	Order No	Description	Amount	Remarks
29/09/2023	KA-ORD/08048/23-24		640,622.00	
11/10/2023	KA-ORD/08051/23-24	Created from Contract ->KA/CON00018/23-24 CSR testing	50,622.00	

Download

PI Date	PI No	Description	Amount	Remarks
11/10/2023	KA-PRO/00759/23-24	sandbox CSR testing	640,622.00	

Download

Proforma Total : ₹6,40,622.00

Download

Date	Document No	Description	Amount(Debit)	Amount(Credit)	Remarks
------	-------------	-------------	---------------	----------------	---------

Download

Net Balance : ₹0.00

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Statement Refreshed

Statement Refreshed

Account:-

The client statement of accounts including proformas,payments and invoices are available here for

the account holder to download.

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:- 01/09/2023 - 10/10/2024

Users(Usage/Limit):- 0/0

Current Release:- Current

Last Updated:- 12/10/2023 18:45:48

No:- KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Request No	Request date	Summary	Status	Last Updated	Release	Aging
REQ/3000288/23-24	04/10/2023	Sandbox	New	11/10/2023		0 days

Download

Date	Status	Action By
06/10/2023	New	

Download

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Statement Refreshed

Statement Refreshed

Requests:-

All Client Requests created during the rollout of Konnect ERP along with the status and aging of the same are available to the account holder to view and download.

This allows the account holder to track the status of requests in a transparent and online manner

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:-

01/09/2023 - 10/10/2024

Users(Usage/Limit):-

0/0

Current Release:-

Current

Last Updated:-

12/10/2023 18:45:48

No:- KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Ticket No	Date	Topic	Summary	User	Status	Due Date	Last Updated	Aging
<div>Download</div>								
<div>Download</div>								

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Statement Refreshed

Statement Refreshed

Service Desk:-

All Support tickets raised by the account holder to Konnect Support team are visible here, so the users need not use multiple sites to get this information. The history of the ticket along with the expected date of closure are made available.

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:-

01/09/2023 - 10/10/2024

Users(Usage/Limit):-

0/0

Current Release:-

Current

Last Updated:-

12/10/2023 18:45:48

No:- KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Phase	Plan Start date	Actual Start date	Plan End date	Actual End date	Completed	Amount Due on Completion	Remarks
Training	01/09/2023		13/10/2023		<input type="checkbox"/>	0.00	
<div>Download</div>							
Phase	Consultant	Start date	End date	On-Site	Remarks		
<div>Download</div>							

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Project Refreshed

Project Refreshed

Project:-

The rollout timeline and the trainings offered by Konnect can be viewed here, information on the

dates,scope and consultant deputed for those trainings are available here.

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:- 01/09/2023 - 10/10/2024

Users(Usage/Limit):- 0/0

Current Release:- Current

Last Updated:- 12/10/2023 18:45:48

No.- KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

CSR No	Date	Name	CSR Type	CSR Status	Summary	Created By	Action By	Last Updated	Last Result	Ageing
1000002	04/10/2023	training fpr SO module	Training	Request Created	This week required	Subash	Konnect Team	05/10/2023	test	8 days
1000000	03/10/2023	Testing	Training	Request Created	Need Training for scm	Subash	Konnect Team	05/10/2023	ttest	9 days
1000004	10/10/2023	Purchase Module	Training	Request Created	Requisition to PO cycle retraining	Subash	Konnect Team	10/10/2023	ok approved	2 days
1000006	12/10/2023	SO Report	Data Upload	Client Action	New	Subash	Sanbox Server (Live SYNC)	12/10/2023		0 days
1000008	12/10/2023	New Report	Custom Report	Client Action	New Report	Subash	Sanbox Server (Live SYNC)	12/10/2023		0 days
1000009	12/10/2023	payment Request Tracking Report q	Custom Report	Request Created	Detail Tracking	Subash	Konnect Team	12/10/2023	Wrongly Created	0 days

Download

New CSR

Edit CSR

Attachments

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Project Refreshed

Project Refreshed

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:- 01/09/2023 - 10/10/2024

Users(Usage/Limit):- 0/0

Current Release:- Current

Last Updated:- 12/10/2023 18:45:48

No.- KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

CSR No	Date	Name	CSR Type	CSR Status	Summary	Created By	Action By	Last Updated	Last Result	Ageing
1000002	04/10/2023	training fpr SO module	Training	Request Created	This week required	Subash	Konnect Team	05/10/2023	test	8 days
1000000	03/10/2023	Testing	Training	Request Created	Need Training for scm	Subash	Konnect Team	05/10/2023	ttest	9 days
1000004	10/10/2023	Purchase Module	Training	Request Created	Requisition to PO cycle retraining	Subash	Konnect Team	10/10/2023	ok approved	2 days
1000006	12/10/2023	SO Report	Data Upload	Client Action	New	Subash	Sanbox Server (Live SYNC)	12/10/2023		0 days
1000009	12/10/2023	payment Request Tracking Report q	Custom Report	Request Created	Detail Tracking	Subash	Konnect Team	12/10/2023	Wrongly Created	0 days

Download

New CSR

Edit CSR

Attachments

Date	Result	CSR Status	Comments
10/10/2023	ok approved	Request Created	Stage Changed from :- Client Action To :- Request Created By user :- Gowtham Balasubramanium Comment Updated by :- Gowtham Balasubramanium

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Profile Refreshed

Profile Refreshed

CSR:-

CSR is a new Tool to be introduced to stream all communication and requests by Account holder with Konnect would be available here. These could be training requests,New Reports,Print formats,ERP Assistance request or scenarios that need to be configured or altered in the Client

System. Going forward this would be single window for Konnect-Client Communication.

The screenshot shows the 'New CSR' (Customer Service Request) form within the Konnect ERP system. The form is titled 'New CSR' and includes the following fields and controls:

- CSR Type:** A dropdown menu with 'Training' selected.
- CSR No:** A text field.
- Name:** A text field.
- Date:** A date field with the value '23/10/2023'.
- Summary:** A large text area for the request summary.
- Required Date:** A date field with a calendar icon.
- On-Site:** A checkbox.
- Duration(days):** A text field with a calendar icon.
- Last Result:** A text area for the last result.
- Comments:** A text area for additional comments.
- CSR Stage:** A dropdown menu with 'Request Created' selected.
- Closed:** A checkbox.

At the bottom of the form, there are buttons for 'Update', 'Attach', 'Approve', 'Reject', and 'Cancel CSR'. The background shows the 'Client Information Center' tab with various system information and a list of CSR records.

CSR Type :

- 1) Customer Report : You must choose this option if you need to update any existing reports or create any new ones.
- 2) Data Upload : For master data upload this type will be selected.(Ex - Product, Business partner, Bill of material, routing)
- 3) ERP Assistance : Please choose this option if you require any assistance or support with software-related questions.
- 4) New scenario : This type can be chosen if a new scenario is needed.
- 5) Print format : Choose this option if any existing print formats need to be corrected or if a new print format is needed.
- 6) Scenario change : This type must be chosen if the current scenario is to be modified.
- 7) Training : You can choose this option if you need any training for a specific transaction or master file import.

CSR Stage :

- 1) Client Action : It must be chosen when the client needs to finish the point.
- 2) Request created : Requirements will guide the creation of the request.
- 3) Request cancelled : If a request is modified after it has been completed, it will be canceled.
- 4) Request validated : Tasks must be authenticated when they are finished.

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:- 01/09/2023 - 10/10/2024

Users(Usage/Limit):- 0/0

Current Release:- Current

Last Updated:- 12/10/2023 18:45:48

No - KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Document No	Type	Module	Business Area
1000002	Project	Konnect ERP_Pre-Sales CRM	Despatch(Shipment)
1000002	Project	Konnect ERP_Pre-Sales CRM	Quotation

Download

Type	Description	Department	Deviation	Mitigation	Roll-out	Remarks
Area - Scenario			Standard(No Deviation)	Not Applicable	In-Scope	

Download

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Project Refreshed

Project Refreshed

BPX:-

BPX is a new tool offered by Konnect to map all Client Business Process and Scenarios in the system,

All Scenarios configured during the rollout can be viewed here and downloaded, this will help the Account Holder to view the BPX configured and can be downloaded as well.

Home (99)

Client Information Center

Konnect ERP Account

Subscription Date:- 01/09/2023 - 10/10/2024

Users(Usage/Limit):- 0/0

Current Release:- Current

Last Updated:- 12/10/2023 18:45:48

No - KACC/500014/23-24

Profile

Subscription

Account

Requests

Service Desk

Project

CSR

BPX

Reports

Report Name

Report ID

Download

Print Preview

Sync Data

Access Management

Manage KPI

View KPI

Data Quality Results

Project Refreshed

Project Refreshed

Reports:-

All Account related reports related to any of the above information can be downloaded from here in PDF format.

Open CSR Document

Open CSR document Header

The screenshot shows a web application window titled "Open CSR Document: 1000002 ...". The form is titled "Open CSR Document" and contains various fields for data entry. The fields are organized into two main columns. The left column includes fields for Client (Sandbox), Document No (1000002), Name (Customer), Business Partner (AB Engineering), Sales Representative (Harish Demo), CSR Type (Data Upload), CSR Stage (Client Action), Summary (need training for scm), On-Site (Client Location) (checked), Last Result, Order (50317_24/07/2023), Payment, and MOM. The right column includes fields for Organization (Manufacturing Discrete), Closed Status (unchecked), Transaction Date (03/10/2023), User/Contact (AB Engineering), Date Required, Duration (1.0), Duration Unit (Day), Approved (unchecked), Processed (unchecked), Receipt Demand (1000000_Sakthi Food Stores), Project Schedule, and Action Items. The form is displayed in a browser window with a toolbar at the top and a sidebar on the left.

Field	Value
Client	Sandbox
Document No	1000002
Name	Customer
Business Partner	AB Engineering
Sales Representative	Harish Demo
CSR Type	Data Upload
CSR Stage	Client Action
Summary	need training for scm
On-Site (Client Location)	<input checked="" type="checkbox"/>
Last Result	
Order	50317_24/07/2023
Payment	
MOM	
Organization	Manufacturing Discrete
Closed Status	<input type="checkbox"/>
Transaction Date	03/10/2023
User/Contact	AB Engineering
Date Required	
Duration	1.0
Duration Unit	Day
Approved	<input type="checkbox"/>
Processed	<input type="checkbox"/>
Receipt Demand	1000000_Sakthi Food Stores
Project Schedule	
Action Items	

Critical Fields:

- 1) Name : The name of an entity (record) is used as an default search option in addition to the search key. The name is up to 60 characters in length.
- 2) Transaction date : The Transaction Date indicates the date of the transaction.
- 3) Business partner : A Business Partner is anyone with whom you transact. This can include Vendor, Customer, Employee or Salesperson.
- 4) User/contact : The User identifies a unique user in the system. This could be an internal user or a business partner contact

5) CSR Type : It is used to select the CSR type.

6) CSR Stage : It is used to select the CSR Stage.

7) Summary : The Summary allows free form text entry of a recap of this request.

8) Duration Unit : It is used to select the Duration unit type.

Critical & one-time setup fields:

1) Organization: An organization is a unit of your client or legal entity - examples are store, department. You can share data between organizations.

Non-Critical Fields:

1) Closed status : This allows to have multiple closed status.

2) Sales Representative : The Sales Representative indicates the Sales Rep for this Region. Any Sales Rep must be a valid internal user.

3) Date Required : Date when required.

4) Duration : Expected (normal) Length of time for the execution.

5) On-site Location :

6) Last Result : The Last Result identifies the result of the last contact made.

7) Order : The Order is a control document. The Order is complete when the quantity ordered is the same as the quantity shipped and invoiced. When you close an order, unshipped (backordered) quantities are cancelled.

8) Receipt Demand : Receipt demand is a control document & it will display document no.

9) Payment : The Payment is a unique identifier of this payment.

10) Project schedule : It is used to select the project schedule.

11) MOM : It is used to mention the MOM document.

12) Action items :

Zoom conditions:

Customization: