

Tabs

- Service Followup
- Service Person
- Parts/Labor
- Activity
- History

Service Followup

Client Konnect Demo

Service Request 1000004_PAG Industries

Original Document 800130

Document No SFU01

Name

Description

Product 1000 KG Manual door Lift_1000 KG Manual door Lift

Attribute Set Instance #SSL16_1001177

Request Type Phone Call

Organization Manufacturing Discrete

Service Order Date 27/08/2019 4:17:09 PM

Document Type Service follow-up

Business Partner PAG Industries

Partner Location Coimbatore

Requested By rajikumar

Requester Contact 32454566

Product Status Functioning Normally

Warranty Status Out of Warranty

Payment Term

Payment Rule

Price List Purchase INR

Sales Representative Danial

Updated Product Status Functioning Normally

Time Spend

Service Cost 0.00

Document Status Completed

AMC Status AMC awaiting Payment

☐ Follow Up ☒ Paid

Currency INR

Warehouse Main Warehouse

Follow Up Date

Service Uom

Invoice ☐ Approved ☒ Processed

Document Action

Activate Windows
Go to Settings to activate Windows.

Critical Fields:

- 1) Service Request- The service document number which is assigned to the service person needs to be selected.
- 2) Sales Representative- The Sales Representative indicates the Sales Rep for this Region. Any Sales Rep must be a valid internal user.
- 3) Warehouse- The Warehouse identifies a unique Warehouse where products are stored or Services are provided.

4) Price List- Price Lists are used to determine the pricing, margin and cost of items purchased or sold.

5) Currency- Indicates the Currency to be used when processing or reporting on this record

Critical & onetime setup fields:

1) Organization Field- This Field is used to select the organization which you are going to process the order.

2) Target Document Type- This Field is used to select the type of the document that you are going to process.

Non-Critical Fields:

1) Request Type- Customer can provide you information through various sources like (Phone,Email etc) This field is used to track the detail.

2) Requested By- The name of the person from the customer place who informed regarding the break down.

3) Product Status- The function of the product like (Functioning normally,Function with problem etc)

4) Requester Contact- The contact number of the person from the customer place who informed regarding the break down.

5) Service Order Date- current date while creating the document will be taken user can edit.

6) Warranty Status- Warranty status will display automatically by the system by calculating the warranty date.This is a read only Field.

- 7) AMC Status- AMC Status- will display automatically by the system by calculating the AMC date.This is a read only Field.
- 8) Business Partner- Business partner will automatically display from Invoice if Invoice number is selected.If Without out Invoice user have to select a Business partner.
- 9) Partner Location- Partner Location will automatically display from Invoice if Invoice number is selected.If Without out Invoice user have to select a Partner Location.
- 10) Product- Product will automatically display from Invoice if Invoice number is selected.If Without out Invoice user have to select a Product.
- 11) Payment Terms- Payment Terms identify the method and timing of payment.
- 12) Payment Rule- The Payment Rule indicates the method of invoice payment.
- 13) Time Spend- total time spent during the service can be mentioned
- 14) Service UOM- The duration unit of measuremet acn be selceted here.
- 15) Service Cost- Total service cost will be entered
- 16) Invoice-If any Invoice is raised against this service visit/Estimate will be displayed here.this is a read only field.
- 17) Paid check Box- Invoice will be raised if payment is made by the customer.System will auto check this check box.
- 18) Approved Check Box- if any approval required while raising the estimate.System will auto route as per Hierarchy.
- 19) Updated product status- This field determines once after the service is done the updated product status of the product.
- 20) Followup Check Box- If Follow up required for this job card this check box can be enabled.

21) Followup Date- If Follow check box is enabled then need to fill the followup date.

Serial number/Lot number (ASI):

In this transaction if attribute set instance is provided in previous document for the selected product. That can be selected here.

Zoom conditions:

Customization:

Service Person

The screenshot shows the 'Service Follow-up' form in the KCONNECT ANALYTICS system. The form is titled 'Service Follow-up: SFU01' and is part of a 'Service Person' record. The form fields are organized into two columns. The left column contains fields for 'Client' (Kconnect Demo), 'Service Request' (1000004_PAG Industries), 'Start Date' (27/08/2019, 1:52:00 PM), 'Service Person' (Danial), 'Activity Master' (Break Down Service), and 'Duration' (2). The right column contains fields for 'Organization' (Manufacturing Discrete), 'End Date' (27/08/2019, 6:00:00 PM), and 'Duration Unit' (Hour). The form is displayed in a web browser window with a navigation bar at the top and a sidebar on the left. The browser window title is 'KCONNECT ANALYTICS' and the user is logged in as 'dineshraj.s@Kconnect Demo.*Kconnect Demo Admin'. The browser address bar shows 'Service Follow-up > Service Person'. The browser window also displays a 'Home (23)' tab and a 'Summary' tab. The browser window also displays a 'Feedback' button and a 'Profile' button. The browser window also displays a 'Preference' button and a 'Change Role' button. The browser window also displays a 'Log Out' button. The browser window also displays a '1/1' page indicator. The browser window also displays an 'Activate Windows' watermark.

Client*	Kconnect Demo	Organization*	Manufacturing Discrete
Service Request	1000004_PAG Industries		
Start Date*	27/08/2019 1:52:00 PM	End Date*	27/08/2019 6:00:00 PM
Service Person	Danial		
Activity Master	Break Down Service		
Duration	2	Duration Unit	Hour

Critical Fields:

- 1) Start Date- The service In charge or Supervisor have to select the start date when the service person needs to attend the break down.
- 2) End Date-The service In charge or Supervisor have to select the End date when the service person needs to complete the break down.
- 3) Service Person- Assign one are multiple service person who are going to attend the service request.
- 4) Activity Master- List of activities will be displayed from the activity master.User have to select the activity based on the problem.System will automatically display the duration from the Activity Master.

Critical & onetime setup fields:

Non-Critical Fields:

Serial number/Lot number (ASI):

Zoom conditions:

Customization:

Parts/Labor

KONECT ANALYTICS

dineshraj.s@Kconnect Demo.*Kconnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (23) | Summary | *Service Follow-up: SFU01 ✕

Service Follow-up > Parts/Labor

Inserted

Client	Connect Demo	Organization	Manufacturing Discrete
Service Order	SFU01_1	<input type="checkbox"/> Invoiced	
Product		Quantity	0
Product For Labor Charges		UOM	Each
Parts/Labor Type	Not Covered	Tax	
Discount %	0.0		
Price	0.00		
Amount	0.00		

Activate Windows
Go to Settings to activate Windows.

Critical Fields:

- 1) Product- Select the Product which needs to be changed.
- 2) Parts/Labor type- this field describes whether the product is cover under AMC or warranty.
- 3) Product for Labor Charge- Select the charged product which need to be changed
- 4) Quantity- Number quantity of the product which needs to be replaced.
- 5) UOM- Unit of measurement of the Product selected.
- 6) Tax- Tax for the selected product.
- 7) Invoiced check box- If this product needs to be invoiced then this check box should be enabled.

Critical & onetime setup fields:

Non-Critical Fields:

Serial number/Lot number (ASI):

Zoom conditions:

Customization:

Activity

Critical Fields:

- 1) Start Date and Time- Date and time when the activity is started
- 2) End Date and Time- Date and time when the activity is completed
- 3) Duration Real- This will be auto calculated by the system based on start & end date and time.

Critical & onetime setup fields:

Non-Critical Fields:

Serial number/Lot number (ASI):

NA

Zoom conditions:

Customization:

History

KONNECT ANALYTICS

dineshraj.s@Konnect Demo *Konnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (23) | Summary | Service Follow-up: SFU01 ✕

Service Follow-up > History

Service Order

800129_-1

Service Order Date

27/08/2019 3:49:57 PM

Document No

800129

Name

☒ Paid

Document Status

Closed

Invoice

New-1000016_27/08/2019_900.00

☒ Processed

☐ Approved

Service Request

1000004_PAG Industries

Document Type

Service Visit/Estimate

Type of Order

Estimate/Visit

Product Status

Functioning Normally

AMC Status

AMC awaiting Payment

Warranty Status

Out of Warranty

Activate Windows
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