

Tabs

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

Service Followup

Service Follow-up

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: rajkumar
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

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 measuremnet 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 Person' form in the KCONNECT ANALYTICS application. The form is displayed in a browser window with the following fields and values:

Field	Value
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

The interface includes a top navigation bar with 'Home (23)', 'Summary', and 'Service Follow-up: SFU01'. A toolbar with various icons is located below the navigation bar. The bottom right corner of the form area contains an 'Activate Windows' watermark.

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

The screenshot displays the 'Parts/Labor' form within the Konnect Analytics interface. The form is titled 'Service Follow-up: SFU01' and is located under the 'Service Follow-up > Parts/Labor' navigation path. The form contains several input fields and a table of values.

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

An 'Activate Windows' watermark is visible in the bottom right corner of the screenshot.

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

Client: Konnect Demo

Organization: Manufacturing Discrete

Service Person: Danial

Service Order: SFU01_-1

Activity Master: General Check

Duration: 1

Date Start: 27/08/2019 4:31:47 PM

Duration Unit: Hour

Finish Date: 27/08/2019 7:00:00 PM

Duration Real: 2.0

Description:

Activate Windows
Go to Settings to activate Windows.

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 | Search | Profile | Preference | Change Role | Log Out | dinashraj.s@Konnect Demo.* | Konnect Demo Admin

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

Service Follow-up > History

Service Order	800129_-1	Service Request	1000004_PAG Industries
Service Order Date	27/08/2019 3:49:57 PM	Document Type	Service Visit/Estimate
Document No	800129	Type of Order	Estimate/Visit
Name		Product Status	Functioning Normally
<input checked="" type="checkbox"/> Paid		AMC Status	AMC awaiting Payment
Document Status	Closed	Warranty Status	Out of Warranty
Invoice	New-1000016_27/08/2019_900.00		
<input checked="" type="checkbox"/> Processed	<input type="checkbox"/> Approved		

Activate Windows
Go to Settings to activate Windows.

