

Service Followup

- Window Introduction
 - Introduction
- Tabs
 - Service Followup
 - Service Person
 - Parts/Labor
 - Activity
 - History
- Document Action
 - Validations
 - Actions

Window Introduction

Introduction

Introduction:

If any followup required this window is used and followup activity of the service person can be tracked.

Business Example:

Once the lay men finishes his activities using job card,And still he needs to recheck after several days.The user can set the followup in Job card,And the followup activity can be entered in this window.

Tabs

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

Document Action

AMC Status AMC awaiting Payment

☐ Follow Up ☒ Paid

Currency INR

Warehouse Main Warehouse

Follow Up Date

Service Uom

Invoice

☐ Approved ☒ Processed

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

KONNECT ANALYTICS | dineshr@s@Konnect Demo */Konnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

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

Service Follow-up > Service Person

Client* Konnect 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

Activate Windows
Go to Settings to activate Windows.

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:

Tabs

Parts/Labor

KONECT 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 > Parts/Labor

Inserted

Client* Konnect Demo

Organization* Manufacturing Discrete

Service Order SFU01_-1

Product

Product For Labor Charges

Parts/Labor Type Not Covered

Discount % 0.0

Price 0.00

Amount 0.00

☐ Invoiced

Quantity 0

UOM Each

Tax

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:

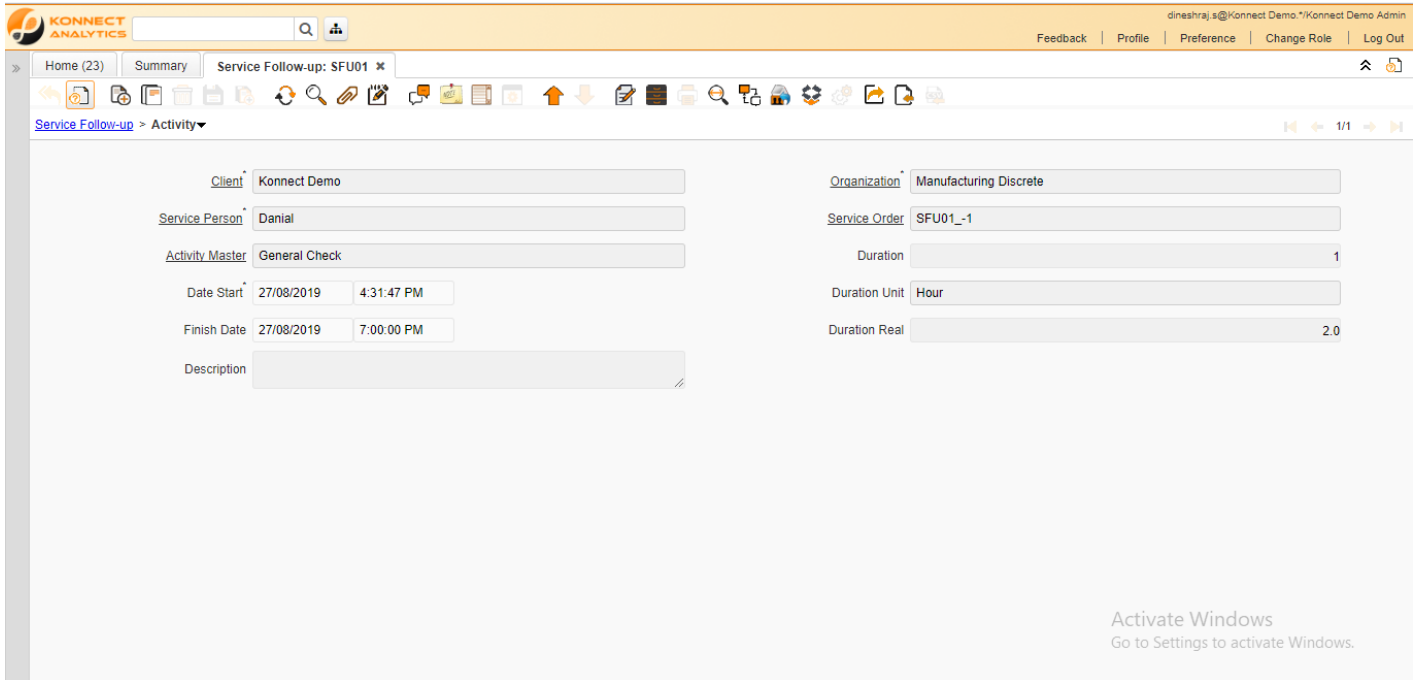
Serial number/Lot number (ASI):

Zoom conditions:

Customization:

Tabs

Activity



The screenshot shows the 'Activity' form in the Konnect Analytics application. The form is divided into two main sections: a left section for activity details and a right section for organizational and duration information. The left section includes fields for Client (Konnect Demo), Service Person (Danial), Activity Master (General Check), Date Start (27/08/2019 4:31:47 PM), Finish Date (27/08/2019 7:00:00 PM), and a Description field. The right section includes fields for Organization (Manufacturing Discrete), Service Order (SFU01_-1), Duration (1), Duration Unit (Hour), and Duration Real (2.0). The form is part of a 'Service Follow-up: SFU01' record. The top navigation bar shows the user is logged in as 'dineshraj.s@Konnect Demo' with roles 'Konnect Demo Admin' and 'Konnect Demo Admin'. The bottom right corner of the form has an 'Activate Windows' watermark.

Field	Value
Client	Konnect Demo
Service Person	Danial
Activity Master	General Check
Date Start	27/08/2019 4:31:47 PM
Finish Date	27/08/2019 7:00:00 PM
Description	
Organization	Manufacturing Discrete
Service Order	SFU01_-1
Duration	1
Duration Unit	Hour
Duration Real	2.0

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:

Tabs

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

1/3

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
Go to Settings to activate Windows.

Document Action

Validations

Save:

- 1) System will check whether all the mandatory fields are filled.
 - 2) System will save the Document number.
 - 3) System will check the Warranty in service product master and display the warrant status and if warrant in then system will display the warranty details.
 - 4) System will check the AMC Master and display the AMC status and if AMC in then system will display the AMC details.
-

Delete:

System will delete the order and its history from the database.This can be done only when the document status is Draft status and In progress Status.

Document action prepare:

- 1) System will check the AMC,Service Product Master,AMC Extension status Master,Invoice document if selected and convert the document status to In progress.
 - 2) System will check the Period control for the document date whether it is open.
-

Document action complete:

System will complete the document and keep the order and change the document status to

complete.

Document action void/reverse correct actual:

1) Void- system will reverse all the cost transaction data's and change the document status to Void

Document action close:

1) system will check whether the feedback is received and change the Document status to close.

Document Action

Actions

Verify:

Not applicable

Create lines from:

Not applicable.

Copy from/lines:

Not applicable

<Copy from/lines>

Not applicable