

Service Jobcard

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Window Introduction

Introduction

Introduction:

This window is used after the estimation is approved and the lay men starts the work.

Business Example:

An Elevator Industry there will be breakdown are preventive scheduled maintenance as per the company standard. While breakdown the customer will call and tell the nature of break down. Once a service person is allocated the service person will go to the concern site and attend the breakdown. Meanwhile during service if they found any parts to be changed and the concern part is not covered in warranty or AMC then the service person will provide an estimation to the customer through Invoice. Once the payment is done against the invoice the lay men work is tracked using this window.

Tabs

Tabs

Service Jobcard

Client: Konnect Demo
Service Request: 1000004_PAG Industries
Original Document: [Empty]
Document No: 800130
Name: [Empty]
Description: [Empty]
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 4:09:19 PM
Document Type: Service Jobcard
Business Partner: PAG Industries
Partner Location: Coimbatore
Requested By: rajkumar
Requester Contact: 32454566
Product Status: Functioning Normally
AMC Status: AMC awaiting Payment

Payment Term: [Empty]
Payment Rule: [Empty]
Price List: Purchase INR
Updated Product Status: Functioning Normally
Time Spend: [Empty]
Service Cost: 0.00
Document Status: Closed

Warranty Status: Out of Warranty
 Follow Up Paid
Currency: INR
Warehouse: Main Warehouse
Sales Representative: Danial
Follow Up Date: 29/08/2019 12:00:00 PM
Service Uom: [Empty]
Invoice: [Empty]

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:

NA

Customization:

Tabs

Service Person

The screenshot shows the 'Service Person' form in the Konnect Analytics application. The form is titled 'Service JobCard: 800130' and is part of a 'Summary' tab. The form fields are as follows:

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

The interface includes a top navigation bar with 'Home (23)', 'Summary', and 'Service JobCard: 800130'. A toolbar with various icons is located below the navigation bar. The bottom right corner of the form 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:

1) Duration - User have to mention the time duration for completion of the task.

2) Duration unit - user have to mention the time UOM of the duration.

Non-Critical Fields:

NA

Serial number/Lot number (ASI):

NA

Zoom conditions:

NA

Customization:

Tabs

Parts/Labor

The screenshot displays the 'Parts/Labor' form in the Konnect Analytics application. The form is divided into two main sections. The left section contains the following fields: Client (Kconnect Demo), Service Order (800130_-1), Product, Product For Labor Charges, Parts/Labor Type (Not Covered), Discount % (0.0), Price (0.00), and Amount (0.00). The right section contains: Organization (Manufacturing Discrete), an Invoiced checkbox, Quantity (0), UOM (Each), and Tax. The top navigation bar includes the Konnect Analytics logo, a search bar, and user information (dineshraj.s@Kconnect Demo, *Kconnect Demo Admin). The breadcrumb trail shows 'Service JobCard > Parts/Labor'.

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:

NA

Non-Critical Fields:

1) Discount - User can mention the discount percentage here, Based on the percentage mention value will be calculated in the transaction.

Serial number/Lot number (ASI):

NA

Zoom conditions:

NA

Customization:

Tabs

Activity

The screenshot shows the Konnect Analytics web application interface. The top navigation bar includes the logo, a search bar, and user information (dineshraj.s@Konnect Demo, Konnect Demo Admin). The main content area displays the 'Activity' form for 'Service JobCard: 800130'. The form is organized into two columns of input fields:

Client	Konnect Demo	Organization	Manufacturing Discrete
Service Person	Danial	Service Order	800130_-1
Activity Master	Break Down Service	Duration	2
Date Start	27/08/2019 4:14:38 PM	Duration Unit	Hour
Finish Date	27/08/2019 6:00:00 PM	Duration Real	1.0
Description			

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

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:

1) Description - User can mention the description of the transaction in this field.

Serial number/Lot number (ASI):

NA

Zoom conditions:

NA

Customization:

Tabs

History

KONNECT ANALYTICS | dineshraj.s@Konnect Demo.* | Konnect Demo Admin | Feedback | Profile | Preference | Change Role | Log Out

Home (23) | Summary | Service JobCard: 800130

Service JobCard > 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.

This Sub tab is used for only viewing purpose.

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