

Service Jobcard

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

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

KONNECT ANALYTICS feed

dineshraj.s@Konnect Demo *Konnect Demo Admin
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Home (23) | Summary | Service Request: 1000004 ✕ | Service JobCard: 800130 ✕

Service JobCard [1/1]

Client Konnect Demo	Organization Manufacturing Discrete
Service Request 1000004_PAG Industries	Service Order Date 27/08/2019 4:09:19 PM
Original Document	Document Type Service Jobcard
Document No 800130	Business Partner PAG Industries
Name	Partner Location Coimbatore
Description	Requested By rajkumar
Product 1000 KG Manual door Lift_1000 KG Manual door Lift	Requester Contact 32454566
Attribute Set Instance #SSL16_1001177	Product Status Functioning Normally
Request Type Phone Call	AMC Status AMC awaiting Payment

Payment Term	Warranty Status Out of Warranty
Payment Rule	<input checked="" type="checkbox"/> Follow Up <input checked="" type="checkbox"/> Paid
Price List Purchase INR	Currency INR
Updated Product Status Functioning Normally	Warehouse Main Warehouse
Time Spend	Sales Representative Danial
Service Cost 0.00	Follow Up Date 29/08/2019 12:00:00 PM
Document Status Closed	Service Uom
<input type="button" value="Document Action"/>	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:

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 'Service JobCard' tab. The form contains several fields for data entry:

- 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 form also includes a search bar at the top and a navigation bar with tabs like 'Home (23)', 'Summary', and 'Service JobCard: 800130'. The bottom right corner of the form has a watermark that says '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:

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

KONECT ANALYTICS

dineshraj.s@Kconnect Demo *Kconnect Demo Admin

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Home (23) | Summary | *Service JobCard: 800130 ✕

Service JobCard > Parts/Labor

Inserted

Client* Kconnect Demo

Service Order 800130_-1

Product

Product For Labor Charges

Parts/Labor Type Not Covered

Discount % 0.0

Price 0.00

Amount 0.00

Organization* Manufacturing Discrete

☐ 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:

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

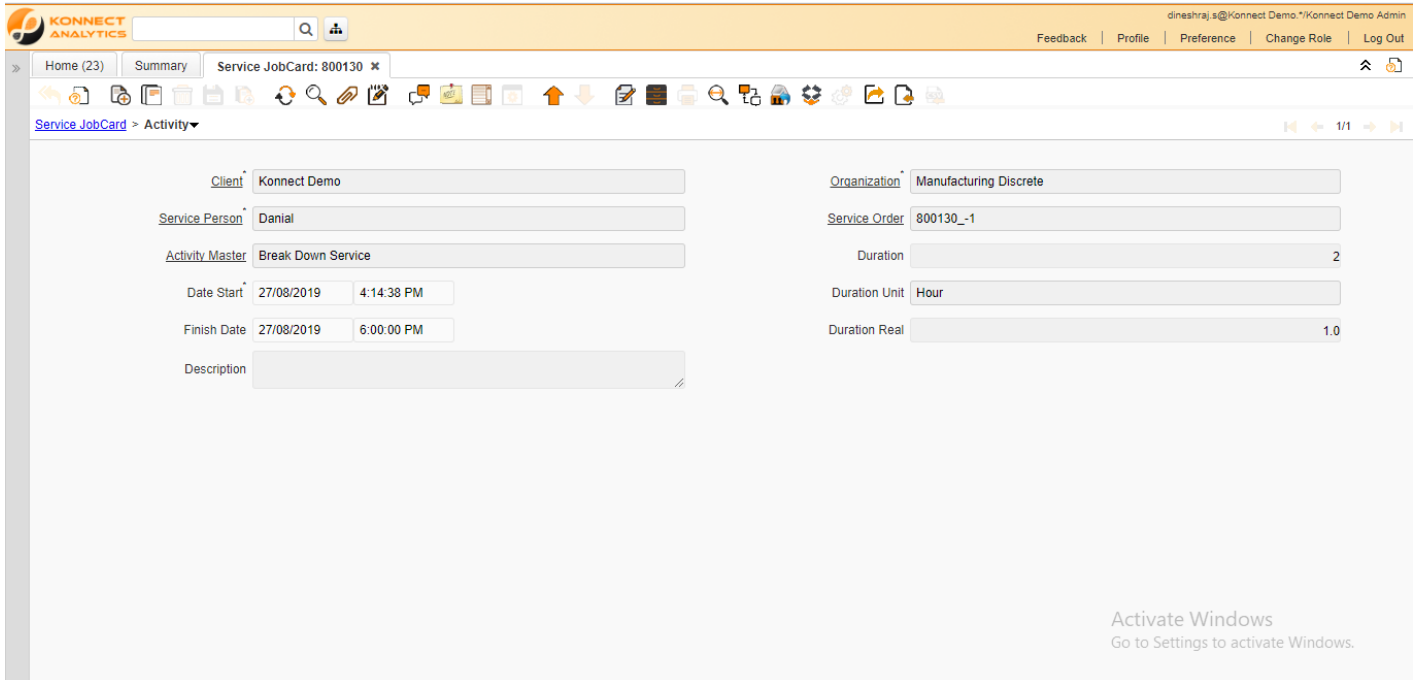
Zoom conditions:

NA

Customization:

Tabs

Activity



The screenshot shows the 'Activity' form in the Konnect Analytics application. The form is divided into two main sections: a left section for client and activity details, and a right section for organization and service order details. The left section includes fields for Client (Konnect Demo), Service Person (Danial), Activity Master (Break Down Service), Date Start (27/08/2019 4:14:38 PM), Finish Date (27/08/2019 6:00:00 PM), and a Description field. The right section includes fields for Organization (Manufacturing Discrete), Service Order (800130_-1), Duration (2), Duration Unit (Hour), and Duration Real (1.0). The form is displayed in a web browser window with a navigation bar at the top and a sidebar on the left.

Client* Konnect Demo

Service Person* Danial

Activity Master Break Down Service

Date Start* 27/08/2019 4:14:38 PM

Finish Date 27/08/2019 6:00:00 PM

Description

Organization* Manufacturing Discrete

Service Order 800130_-1

Duration 2

Duration Unit Hour

Duration Real 1.0

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:

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

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>

Home (23) | Summary | Service JobCard: 800130 ✕

< > 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.

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.

Actions

Verify:

Not applicable

Create lines from:

Not applicable.

Copy from/lines:

Not applicable

<Copy from/lines>

Not applicable