Service order

Introduction

Overview

The Service Order feature has undergone enhancements, now allowing users to include specific details such as service cost and customer name within the document. This refinement enhances the functionality, providing a more detailed and comprehensive approach to managing service-related activities.

Business case

This window is used to capture the service related activities, capturing the service person action on service order and also invoice raised against the service

Tabs

Service order

Critical Fields:

client - It's defines the client name

Organization- This field is used to select the organization

Target document type - Its a user-defined dropdown utilized for document classification purposes.

Service request - Service order can be created with reference to service request.

Request type - Here the user can mention the request type like warranty, product installation or AMC.

Critical & one-time setup fields:

1. business partner - Here we can mention customer

2. Payment terms - Here payment term can be mentioned

3. Attribute set Instance - Here user have to mention the serial no of the product.

Non-Critical Fields:

1. Project- If this order is processed against a project user can tag the project for tracking.

2. Description - This field is used for the descriptive of the service order.

3. service cost - Here service can be mention if required.

Zoom conditions:

NA

Customization:

Based on the clients requirement customization will be done

Service person

Critical Fields:

<u>Organization</u>: This field is used to select the organization

<u>client</u> - This Field is used to select the client

Critical & one-time setup fields:

<u>Service person</u> - This field is used to mention the service person

<u>Activity group master</u> - It's a user defined field utilized for classification of activity

Non-Critical Fields:

Duration - Here we can mention the duration it take to complete the task

Duration unit - Here we can mention the UOM of the duration.

Start date and time - This field is used to capture the start date and time for the task.

End date and time - This field is used to capture the end date and time for the task

Zoom conditions:

NA

Customization:

Based on the clients requirement customization will be done

Service sale order

Critical Fields:

Organization: This field is used to select the organization

client - This field is used to select the client

Target document type - This is a user defined field, utilized for classification of Service sale order.

Critical & one-time setup fields:

Service order - It will refer the service order no will fetch automatically

place of Supply - This field defines the place of supply

Payment term - This field is used to mention the payment term

Business partner - This field used to mention the customer name.

Non-Critical Fields:

Description user can mention the details description of this service sale order in it.

Zoom conditions:

NA

Customization:

Based on the client requirement customization will be done accordingly.

Validation

validation

Save

If the wants to save the changes in any record, they can save the details by clicking on the save Icon

Delete

If the user wants to delete the record, they can delete the details by clicking on the delete Icon