Service Request

Window Introduction

Introduction

Introduction:

1) This process helps you to carry out the initial screening and collecting of information for incoming service requests. This includes relevant service contracts and warranty entitlements.

2) You define follow-up activities with a variety of options,

    a) Such as A simple answer to a support request.

    b) The delivery of a service where labor and service parts are required.

Business Example:

An Elevator Industry will sell their product to their customer based on their requirement.Once the Lift is installed there will be warranty period once the warranty is expired AMC will be maintained for the product.During warranty and AMC period's 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.For collecting the breakdown information and assigning service person this window is used.

Tabs

Service Request

<u>Critical Fields:</u>

1) 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.

2) 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.

3) Product- Product will automatically display from Invoice if Invoice number is selected.If Without out Invoice user have to select a Product.

4) Service Request Date- The date when the service call from the customer is raised.

5) Invoice- If Without invoice check box is not enabled user can select a invoice.If Without invoice

check box is enabled this field will be in read only.

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) Project- If this product or customer is linked to a project user can select the project.A Project allows you to track and control internal or external activities.

2) User Contact- The person who attends the service call user can provide their name here.

3) Priority- User can set the priority of the service request based on the customer urgency and importance.

4) Request Type- Customer can provide you information through various sources like (Phone,Email etc) This field is used to track the detail.

5) Requested By- The name of the person from the customer place who informed regarding the break down.

6) Product Status- The function of the product like (Functioning normally,Function with problem etc)

7) Requester Contact- The contact number of the person from the customer place who informed regarding the break down.

8) Date Required- Service required date to be mentioned

9) Without Invoice (Check Box)- This check box is used to vary the transaction if this check box is

enabled user can proceed the transaction without any customer Invoice reference.

10) Service Person- the person who is responsible for assigning the lay men to proceed the work (Service In charge name or Service supervisor Name)

11) Warranty Status- Warranty status will display automatically by the system by calculating the warranty date.This is a read only Field.

12) AMC Status- AMC Status- will display automatically by the system by calculating the AMC date.This is a read only Field.

13) Warranty Details- If this product is in warranty system will display the product warranty detail from service product Master.

14) AMC- If this product is in AMC system will display the product warranty detail from AMC Master.

15) Request Status- Request status will display automatically based on the service request proceeding transaction status.

16) Previous Request Number- If user want to tag this service request to a previous request number this field is used

17) Shipment/Receipt- If any customer return is available against this service request document number will display here.this is a read only field.

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:

1) Service Visit/Estimate

2) Service Job card

3) Service Followup

4) Service Feed Back

Customization:

Service Person

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 - This field is used to capture the estimated duration to process the task.

2) Duration Unit - This Field used to capture the UOM of the duration.

Non-critical fields:

1) Activity Group master - List of activities will be displayed from the activity group master.

2) Duration - Service duration time will be displayed

Serial number/Lot number (ASI):

NA

Zoom conditions:

Customization:

Tabs

Service History

This Sub tab is used for only viewing purpose.This sub tab contains the service history of the selected Product.

Tabs

History

This subtab is used for viewing purpose.Here system display the service history for the selected service Request.

Tabs

Service complaint

Critical fields:

1) Name - It is used to mention service visit in this field

2) Description - It is used to mention service visit details

Critical & onetime setup fields:

Non-critical fields:

1) warranty complaint - This field used to mention the warranty complaint classification

Serial number/Lot number (ASI):

NA

Zoom conditions:

Customization:

Document Actions

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

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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

<Custom actions>

Not applicable

Process

Process

Header process

1) Product search -

Reports

S.No	Report Type	Report Name	Report Purpose
1	Menu Report	Service Request	1) This report is used to track service request details against business partner who raised service call. 2) Service request details - Service request document number,customer name,Invoice details,service request date,product details,service person details & request type.