

Tabs

- Service Visit/Estimate
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Service Visit/Estimate

KONNECT ANALYTICS feed

dineshraj.s@Konnect Demo */Konnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

Home (23) | Summary | Service Request: 1000004 x | Service Visit/Estimate: 800129 x

Service Visit/Estimate

Client: Konnect Demo

Organization: Manufacturing Discrete

Service Request: 1000004_PAG Industries

Service Order Date: 27/08/2019 3:49:57 PM

Document No: 800129

Document Type: Service Visit/Estimate

Name:

Business Partner: PAG Industries

Description:

Partner Location: Coimbatore

Product: 1000 KG Manual door Lift_1000 KG Manual door Lift

Requested By: rajikumar

Attribute Set Instance: #SSL16_1001177

Requester Contact: 32454566

Request Type: Phone Call

Product Status: Functioning Normally

Updated Product Status: Functioning Normally

AMC Status: AMC awaiting Payment

Payment Term:

Warranty Status: Out of Warranty

Payment Rule:

Price List: Purchase INR

Currency: INR

Sales Representative: Danial

Warehouse: Main Warehouse

Time Spend:

Service Cost: 900.00

Service Uom:

Document Status: Closed

Invoice: New-1000016_27/08/2019_900.00

Document Action

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 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.

Serial number/Lot number (ASI):

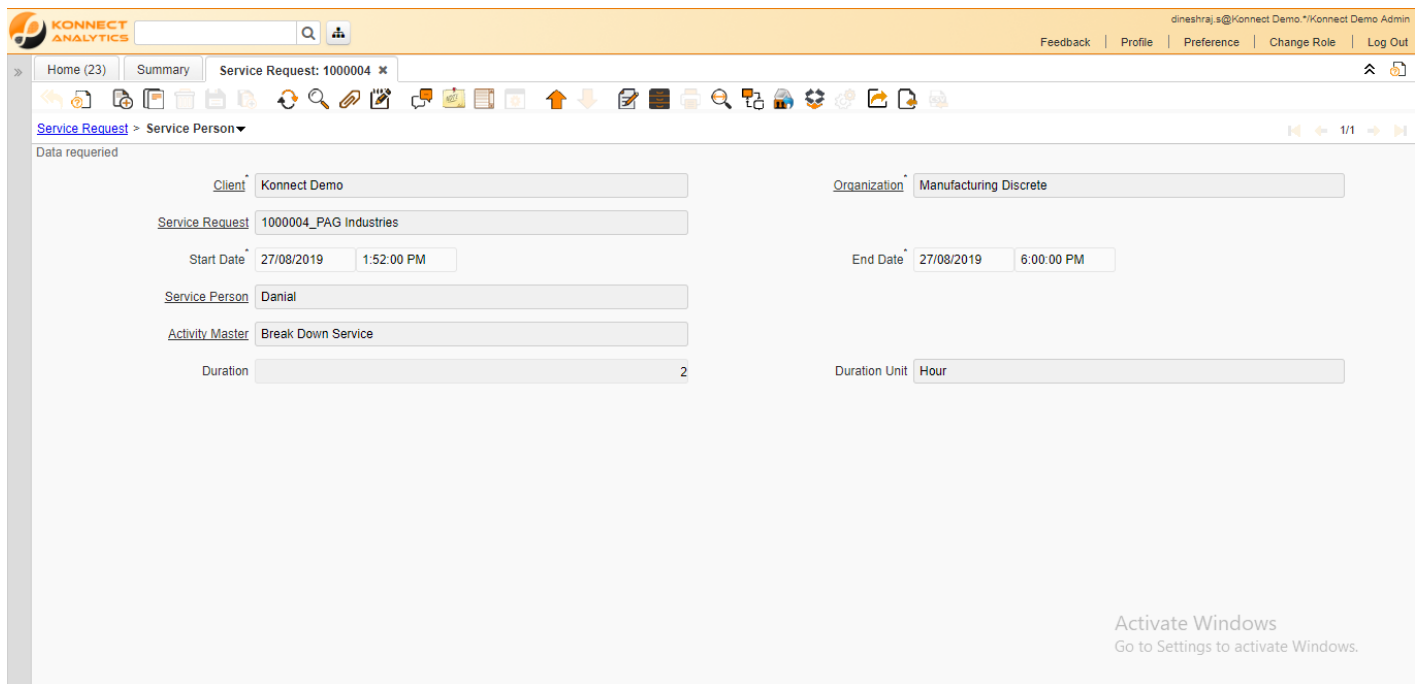
In this transaction if attribute set instance is provided in previous document for the selected product.That can be selected here.

Zoom conditions:

1) Service Request

Customization:

Service Person



The screenshot shows the 'Service Request' form in the Konnect Analytics application. The form is titled 'Service Request: 1000004' and is located under the 'Service Request' menu. The form fields are as follows:

Field	Value
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 'Data requested' section and a 'Feedback' button. The user is logged in as 'dineshraj.s@Konnect Demo' with the role 'Konnect Demo Admin'.

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:

Parts/Labor

KONNECT ANALYTICS | Search | User Icon

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Home (23) | Summary | Service Visit/Estimate: 800129 ✕

Service Visit/Estimate > Parts/Labor ▾

1/1

Client *	Connect Demo	Organization *	Manufacturing Discrete
Service Order	800129_-1	Description	
Product	Drive_Drive	Quantity *	1
Product For Labor Charges		UOM	Each
Parts/Labor Type	Not Covered	<input checked="" type="checkbox"/> Invoiced	
Discount %	0.0	Tax *	No Tax
Price *	900.00		
Amount	900.00		

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:

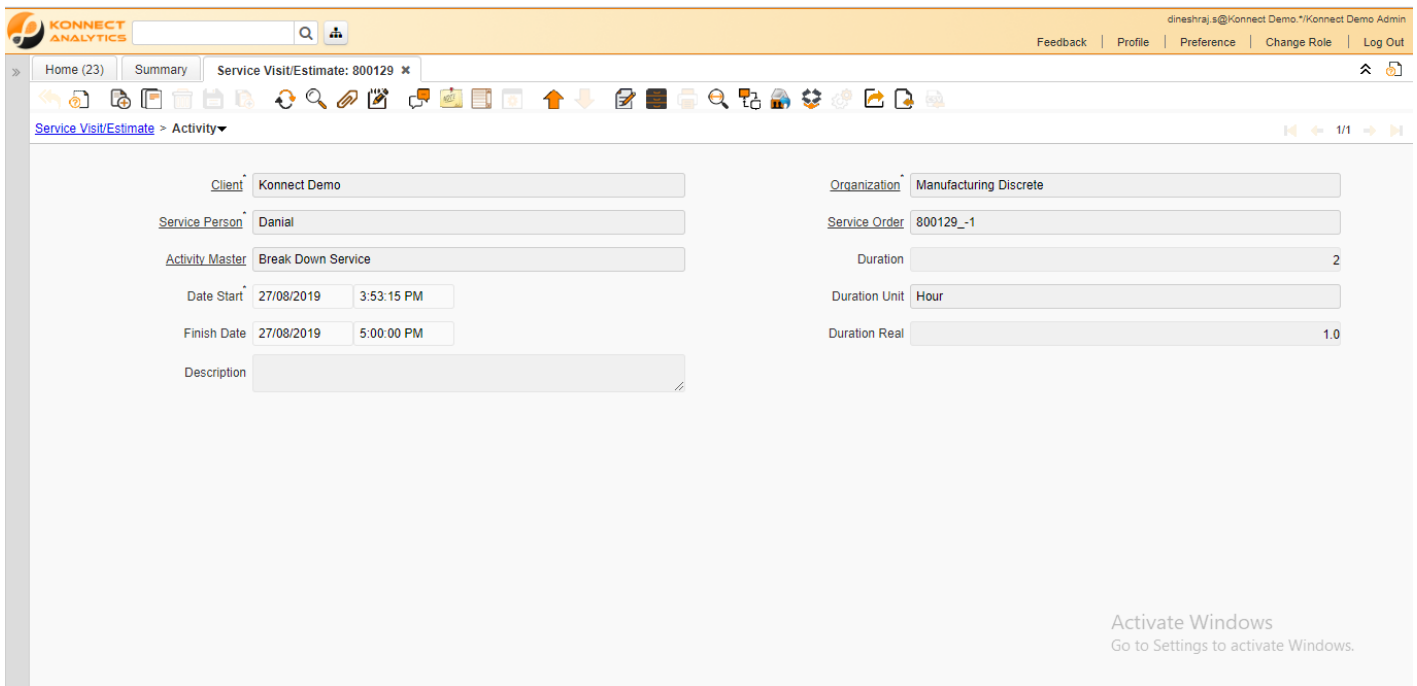
Non-Critical Fields:

Serial number/Lot number (ASI):

Zoom conditions:

Customization:

Activity



The screenshot shows the 'Activity' form in the Konnect Analytics application. The form is divided into two main sections: 'Client' and 'Organization'. The 'Client' section includes fields for 'Service Person' (Danial), 'Activity Master' (Break Down Service), 'Date Start' (27/08/2019 3:53:15 PM), 'Finish Date' (27/08/2019 5:00:00 PM), and 'Description'. The 'Organization' section includes fields for 'Organization' (Manufacturing Discrete), 'Service Order' (800129_-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.

Field	Value
Client	Konnect Demo
Service Person	Danial
Activity Master	Break Down Service
Date Start	27/08/2019 3:53:15 PM
Finish Date	27/08/2019 5:00:00 PM
Description	
Organization	Manufacturing Discrete
Service Order	800129_-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:

Serial number/Lot number (ASI):

Zoom conditions:

Customization:


History



dinashrajsa@Kconnect Demo*/Kconnect Demo Admin

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Home (23) | Summary | Service Visit/Estimate: 800129 ✕



Service Visit/Estimate > 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.

This Sub tab is used for only viewing purpose.