

# Tabs

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# Service Visit/Estimate

**Service Visit/Estimate**

Client: Konnect Demo  
Organization: Manufacturing Discrete  
Service Request: 1000004\_PAG Industries  
Document No: 800129  
Name:   
Description:   
Product: 1000 KG Manual door Lift\_1000 KG Manual door Lift  
Attribute Set Instance: #SSL16\_1001177  
Request Type: Phone Call  
Updated Product Status: Functioning Normally  
Service Order Date: 27/08/2019 3:49:57 PM  
Document Type: Service Visit/Estimate  
Business Partner: PAG Industries  
Partner Location: Coimbatore  
Requested By: rajkumar  
Requester Contact: 32454566  
Product Status: Functioning Normally  
AMC Status: AMC awaiting Payment

Payment Term:   
Payment Rule:   
Price List: Purchase INR  
Sales Representative: Danial  
Time Spend:   
Service Cost: 900.00  
Document Status: Closed  
Warranty Status: Out of Warranty  
Currency: INR  
Warehouse: Main Warehouse  
Service Uom:   
Invoice: New-1000016\_27/08/2019\_900.00  
Paid  Approved   
Processed

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

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## **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.

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## **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 measurement can be selected 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.

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## **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.

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## **Zoom conditions:**

1) Service Request

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## **Customization:**

# Service Person

The screenshot displays the 'Service Person' form within the Konnect Analytics application. The form is titled 'Service Request: 1000004' and is located under the 'Summary' tab. 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 interface includes a top navigation bar with the Konnect Analytics logo, a search bar, and user information (dineshraj.s@Konnect Demo, Konnect Demo Admin). The main content area has a breadcrumb trail 'Service Request > Service Person' and a 'Data required' section. A 'Feedback' button is visible in the bottom right corner.

## 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.
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**Critical & onetime setup fields:**

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**Non-Critical Fields:**

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**Serial number/Lot number (ASI):**

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**Zoom conditions:**

**Customization:**

# Parts/Labor

The screenshot shows the 'Parts/Labor' form in the KONNECT ANALYTICS application. The form is divided into two columns. The left column contains the following fields: Client (Konnect Demo), Service Order (800129\_-1), Product (Drive\_Drive), Product For Labor Charges (empty), Parts/Labor Type (Not Covered), Discount % (0.0), Price (900.00), and Amount (900.00). The right column contains: Organization (Manufacturing Discrete), Description (empty), Quantity (1), UOM (Each), Invoiced (checked), and Tax (No Tax). The top navigation bar includes 'Home (23)', 'Summary', and 'Service Visit/Estimate: 800129 x'. The top right corner shows the user 'dineshraj.s@Konnect Demo.\*Konnect Demo Admin' with links for 'Feedback', 'Profile', 'Preference', 'Change Role', and 'Log Out'. A 'Service Visit/Estimate > Parts/Labor' breadcrumb is visible. An 'Activate Windows' watermark is present in the bottom right corner.

## 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.
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**Critical & onetime setup fields:**

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**Non-Critical Fields:**

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**Serial number/Lot number (ASI):**

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**Zoom conditions:**

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**Customization:**

# Activity

The screenshot displays the KCONNECT ANALYTICS web application interface. The top navigation bar includes the logo, a search bar, and user information (dineshraj.s@Kconnect Demo, \*Kconnect Demo Admin). The main content area shows the 'Activity' form for 'Service Visit/Estimate: 800129'. The form is divided into two columns of fields:

Client	Kconnect Demo	Organization	Manufacturing Discrete
Service Person	Danial	Service Order	800129_-1
Activity Master	Break Down Service	Duration	2
Date Start	27/08/2019 3:53:15 PM	Duration Unit	Hour
Finish Date	27/08/2019 5:00:00 PM	Duration Real	1.0
Description			

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

## 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:

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**Serial number/Lot number (ASI):**

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**Zoom conditions:**

**Customization:**

# History

The screenshot shows the 'History' sub-tab for a 'Service Visit/Estimate' with ID 800129. The interface includes a top navigation bar with the Konnect Analytics logo, a search bar, and user information (dineshraj.s@Konnect Demo, Konnect Demo Admin). The main content area is divided into two columns of data fields.

Field	Value
Service Order	800129_-1
Service Order Date	27/08/2019 3:49:57 PM
Document No	800129
Name	
<input checked="" type="checkbox"/> Paid	
Document Status	Closed
Invoice	New-1000016_27/08/2019_900.00
<input checked="" type="checkbox"/> Processed	<input type="checkbox"/> 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

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

This Sub tab is used for only viewing purpose.