

Service Visit/Estimate

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Window Introduction

Introduction

Introduction:

This window is used for general service or preventive maintenance. And to provide the estimation to the customer. Based on the service request raised.

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 For this purpose this window is used.

Tabs

Tabs

Service Visit/Estimate

Client: Konnect Demo
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

Organization: Manufacturing Discrete
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
 Paid Approved
Currency: INR
Warehouse: Main Warehouse
Service Uom:
Invoice: New-1000016_27/08/2019_900.00
 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

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 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.

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:

Tabs

Service Person

The screenshot shows the 'Service Person' form in the Konnect Analytics application. The form is titled 'Data requested' and contains the following fields:

- 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 application interface includes a top navigation bar with 'Home (23)', 'Summary', and 'Service Request: 1000004'. The user is logged in as 'dineshraj.s@Konnect Demo' with the role 'Konnect Demo Admin'. A watermark for 'Activate Windows' 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.

Critical & onetime setup fields:

Non-Critical Fields:

Serial number/Lot number (ASI):

Zoom conditions:

Customization:

Tabs

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, Parts/Labor Type (Not Covered), Discount % (0.0), Price (900.00), and Amount (900.00). The right column contains: Organization (Manufacturing Discrete), Description, Quantity (1), UOM (Each), an Invoiced checkbox (checked), and Tax (No Tax). The application header includes the Konnect Analytics logo, a search bar, and user information (dineshraj.s@Konnect Demo, Konnect Demo Admin). The breadcrumb trail is 'Service Visit/Estimate > Parts/Labor'.

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:

Tabs

Activity

The screenshot displays the Konnect Analytics web application interface. The top navigation bar includes the logo, a search bar, and user information (dineshraj.s@Konnect Demo, Konnect Demo Admin). The main content area shows the 'Activity' form for 'Service Visit/Estimate: 800129'. The form is organized into two columns of input fields. The left column contains fields for 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), and a Description field. The right column contains fields for Organization (Manufacturing Discrete), Service Order (800129_-1), Duration (2), Duration Unit (Hour), and Duration Real (1.0). A '1/1' page indicator is visible in the bottom right corner of the form area.

Client	Konnect 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			

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:

Tabs

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:

Service Order	800129_-1	Service Request	1000004_PAG Industries
Service Order Date	27/08/2019 3:49:57 PM	Document Type	Service Visit/Estimate
Document No	800129	Type of Order	Estimate/Visit
Name		Product Status	Functioning Normally
<input checked="" type="checkbox"/> Paid		AMC Status	AMC awaiting Payment
Document Status	Closed	Warranty Status	Out of Warranty
Invoice	New-1000016_27/08/2019_900.00		
<input checked="" type="checkbox"/> Processed	<input type="checkbox"/> Approved		

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

This Sub tab is used for only viewing purpose.

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.
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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 line from:

Not applicable

Copy from/lines:

Not applicable

<Custom action>

Not applicable