

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

Service Visit/Estimate

dineshraj.s@Konnect Demo *Konnect Demo Admin
[Feedback](#) | [Profile](#) | [Preference](#) | [Change Role](#) | [Log Out](#)

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Service Visit/Estimate [1/1]

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

Document Action

Warranty Status

Out of Warranty

☒ Paid
 ☐ Approved

Currency

INR

Warehouse

Main Warehouse

Service Uom

Invoice

New-1000016_27/08/2019_900.00

☒ Processed

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:

Tabs

Service Person

The screenshot shows the KONECT 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 displays the 'Service Person' form for Service Request 1000004. The form includes the following fields:

- Client:** Kconnect 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 is titled 'Data requested' and includes a 'Feedback' button. The bottom right corner of the form area displays the text 'Activate Windows Go to Settings to activate Windows.'

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

KONECT ANALYTICS | Search | User: dineshraj.s@Kconnect Demo, Kconnect Demo Admin

Feedback | Profile | Preference | Change Role | Log Out

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

Service Visit/Estimate > Parts/Labor

Client*	Kconnect 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		

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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:

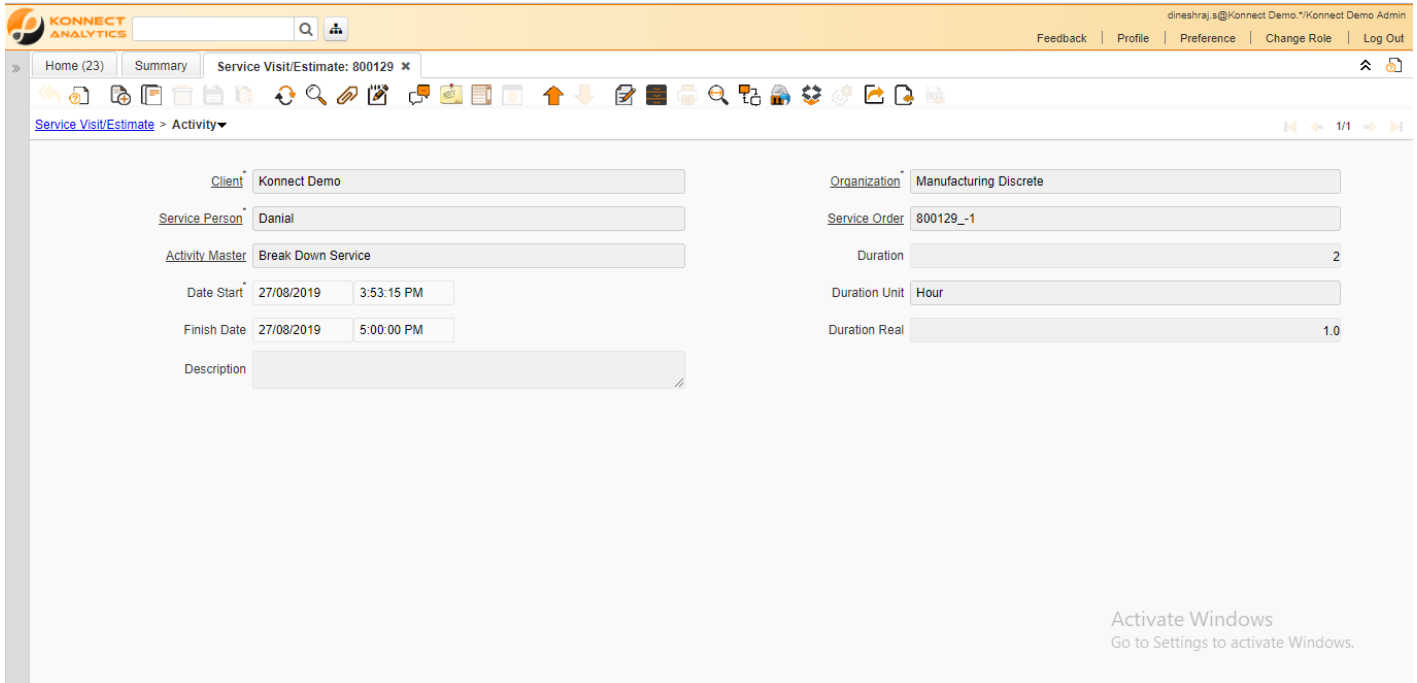
Serial number/Lot number (ASI):

Zoom conditions:

Customization:

Tabs

Activity



The screenshot shows the 'Activity' form in the Konnect Analytics application. The form is titled 'Service Visit/Estimate: 800129'. It contains several input fields for client, organization, service person, activity master, dates, and duration. The 'Date Start' is set to 27/08/2019 at 3:53:15 PM, and the 'Finish Date' is set to 27/08/2019 at 5:00:00 PM. The 'Duration' is set to 2, and the 'Duration Real' is set to 1.0. The 'Description' field is empty. The form is part of a larger application with a navigation bar at the top and a sidebar on the left.

Field	Value
Client	Konnect Demo
Organization	Manufacturing Discrete
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	
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:

Tabs

History

KONNECT ANALYTICS

dineshraj.s@Kconnect Demo */Kconnect Demo Admin | Feedback | Profile | Preference | Change Role | Log Out

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

Service Visit/Estimate > History

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 <u>Invoice</u> 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
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Activate Windows
Go to Settings to activate Windows.

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.
-

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