

SERVICE

CALLS – ITEM SWAP OUT PROCESS OVERVIEW

This process is used when a contract remains active, but one or more of the items on the contract are to be removed **and** replaced with another item. For example, 3 items (machines) are linked to the contract, but one of the items is faulty and must be replaced with an alternative item.

Swap Outs can only be done via a **Call**.

The documents processed at the end of the Swap out will depend on the **Swap Out Configuration** set up and what type of asset is going out:

- i. An **Internal Asset** on Contract
- ii. A **Client (Customer) Asset** on Contract

and what type of asset is coming in:

- i. A **serialised stock item**
- ii. An **Internal Asset**

SWAP OUT SCENARIOS

1. Swap Out an internal asset on contract as the original serial number with another internal asset.
2. Swap Out an internal asset on contract as the original serial number with a serialised stock item.
3. Swap Out a customer asset on contract as the original serial number with a serialised stock item.

4. Swap out a customer asset on contract as the original serial number with an internal asset.

SWAP OUT PROCESS OVERVIEW

1. Service > Calls
2. Call Listing screen > Select the Call > Edit
3. Call Maintenance screen > Work Orders tile
4. Work Orders for Call Ref [] screen > Swap Outs tile
5. Swap Outs for Work Order Code [] screen > Add
6. Swap Out screen > Select Original Serial Number > Select Destination Warehouse and Destination Bin > Select Replacement Serial Number
 - As the Replacement Serial Number is selected the following fields will auto populate:
 - Source Warehouse Name
 - Source Bin Name
 - Selling Price and
 - Purchase Price
 - ... fields will auto populate....
7. Save button >

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UNDER CONSTRUCTION

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