

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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