

SERVICE

WORK ORDERS – SWAP OUTS

The system will need to be configured in order to process machine swap outs.

A default **Buy Back** supplier and **Sell Off** customer will be need to be configured for this processing.

Machine swap out processing is not generally advised. If you are interested in using this process, you will need to follow this up with CO3 Technologies.

When raising the swap out, you will need to select the **original machine**¹, and the **replacement machine**².

BPO2 will process the **buy back** for the item that is returning to store, and the **sale** for the item that is going out to the client.

This process is predominantly used to swap out **accessories** linked to machines on contract. The original item will be removed from the contract and the replacement item will be linked to the contract.

This process preserves the fees, but not the meters and is not generally recommended for swapping out machines.

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

¹The machine that the call is logged against and will be moving into the store

²The machine that is being sent out as replacement for the original machine

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**.

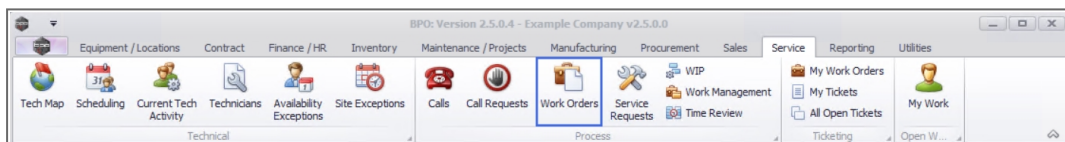
The documents processed at the end of the Swap out will depend on the **Swap Out Configuration** set up and what type of asset is going out:

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

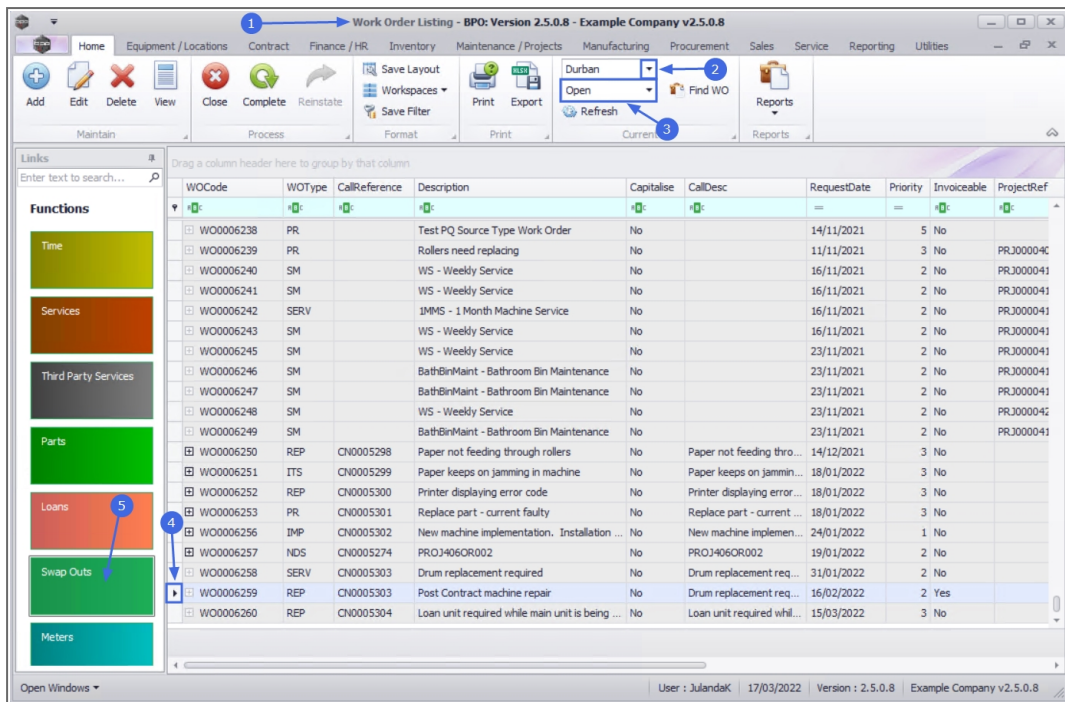
and what type of asset is coming in:

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

Ribbon Access: *Service > Work Orders*



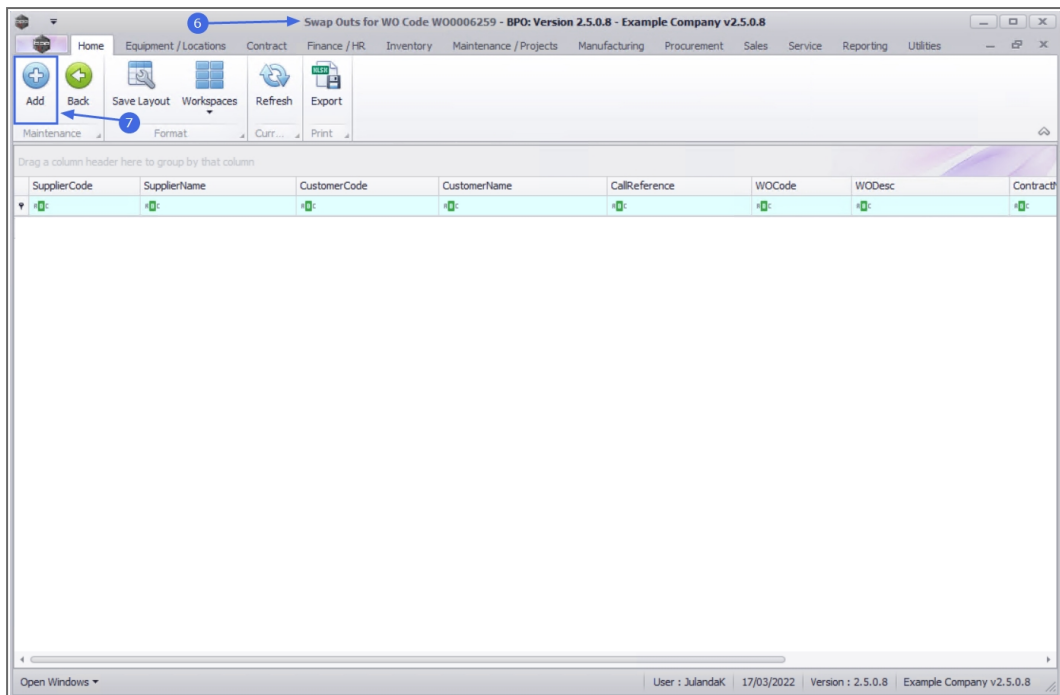
1. The **Work Order Listing** screen will be displayed.
2. Select the **Site** where the work order was issued.
 - The example has **Durban** selected.
3. Set the **Status** to **Open**.
4. Click on the **row** of the work order you wish to process a **swap out** for.
5. Click on the **Swap Outs** tile.



6. The **Swap Outs for WO Code** [work order code] screen will be displayed.

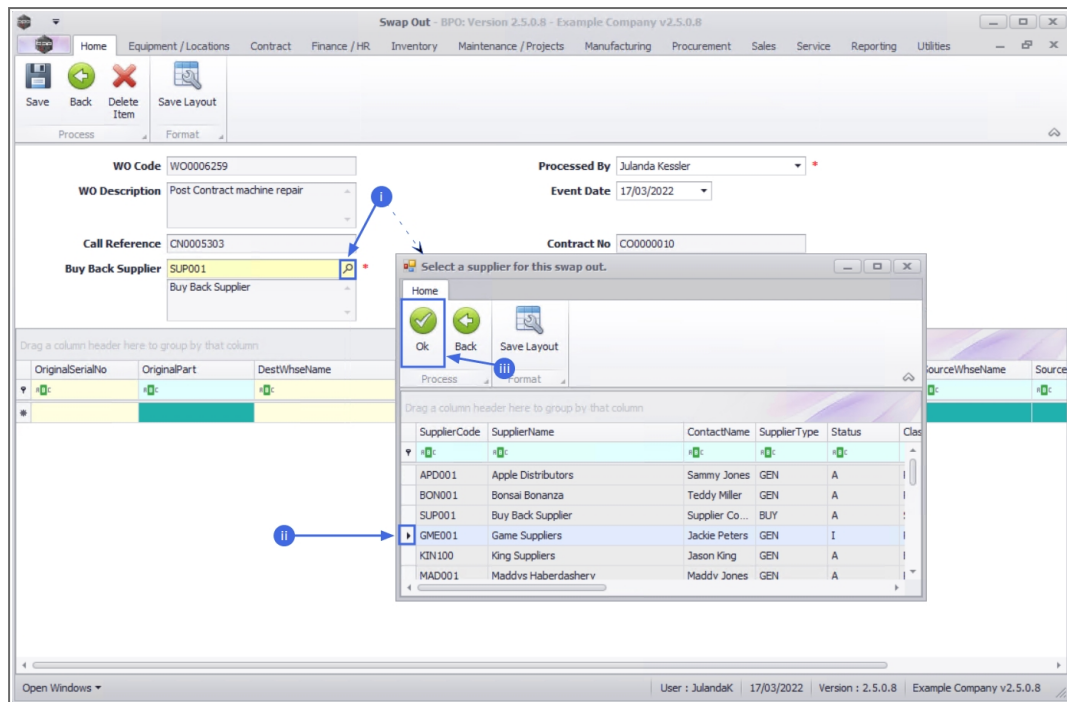
ADD SWAP OUT

7. Click on **Add**.



8. The **Swap Out** screen will be displayed.

- **WO Code:** This field will auto populate with the WO code selected.
- **WO Description:** This field will auto populate with the description of the work order selected.
- **Call Reference:** This field auto populate with the call reference number linked to the work order.
- **Buy Back Supplier:** This field will auto populate with the code number and name of the company specified as the default Buy Back Supplier.
 - i. To select an **alternative supplier**, click on the **search** button to display the **Select a supplier for this swap out** screen.
 - ii. Click in the **row** of the supplier code and supplier name required.
 - iii. Click on **OK**.



Swap Out - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout

Process | Format

WO Code: WO0006259

WO Description: Post Contract machine repair

Call Reference: CN0005303

Buy Back Supplier: SUP001

Processed By: Julanda Kessler

Event Date: 17/03/2022

Contract No: CO0000010

Select a supplier for this swap out.

Home | Back | Save Layout

Process | Format

Drag a column header here to group by that column

SupplierCode	SupplierName	ContactName	SupplierType	Status	Class
APD001	Apple Distributors	Sammy Jones	GEN	A	
BON001	Bonsai Bonanza	Teddy Miller	GEN	A	
SUP001	Buy Back Supplier	Supplier Co...	BUY	A	
GME001	Game Suppliers	Jackie Peters	GEN	I	
KIN100	King Suppliers	Jason King	GEN	A	
MAD001	Maddys Haberdashery	Maddys Jones	GEN	A	

Open Windows | User: JulandaK | 17/03/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

- **Processed By:** This field will auto populate with the name of the person currently creating the swap out. Click on the down **arrow** to select an alternative person, if required.
- **Event Date:** The current date will be displayed in the field. Click on the down **arrow** to select an alternative date using the calendar function.
- **Contract No:** The contract number for the item linked to the work order will be displayed.
- **Sell Off Customer:** The Cash Sales Account code and name for the sell off customer will auto populate this field. Click on the **search** button to select an alternative Sell Off Customer, if required, following the steps above.

Swap Out - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout

Process Format

WO Code: WO0006259

WO Description: Post Contract machine repair

Call Reference: CN0005303

Buy Back Supplier: GME001 Game Suppliers

Processed By: Jeff Rivers

Event Date: 17/03/2022

Contract No: CO0000010

Sell Off Customer: CUS001 Cash Sales Account

Drag a column header here to group by that column

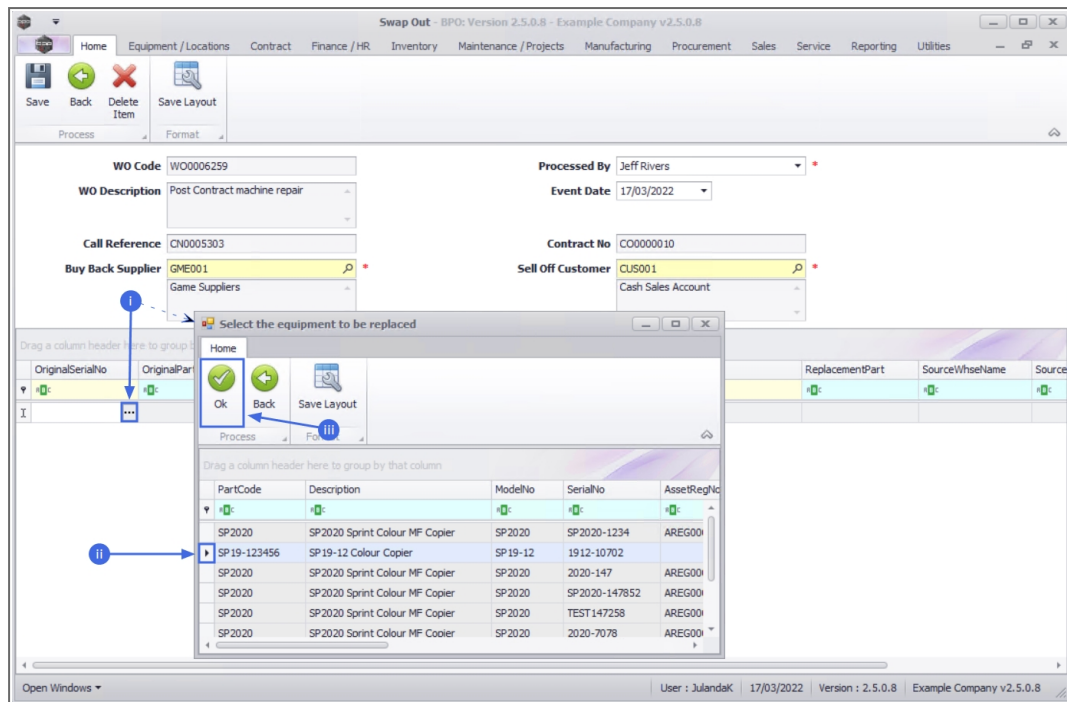
OriginalSerialNo	OriginalPart	DestWhseName	DestBinName	PurchasePrice	ReplacementSerialNo	ReplacementPart	SourceWhseName	Source

Open Windows

User: JulandaK 17/03/2022 Version: 2.5.0.8 Example Company v2.5.0.8

DATA GRID

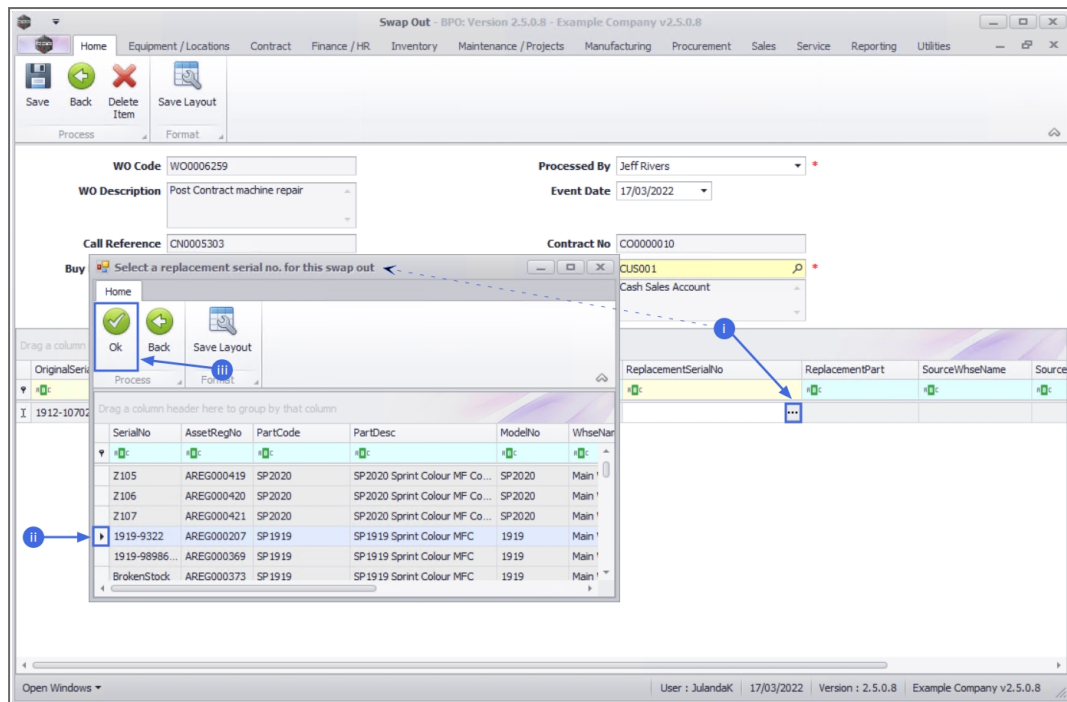
- **Original Serial No:** Click in the text box.
 - If only one item is linked to the contract then the field will auto populate with the number of that item.
 - If more than one item is linked, then an ***ellipsis*** button will display.
 - Click on the ellipsis button to display the ***Select the equipment to be replaced*** screen.
 - Click on the ***row*** of the part code or serial number you wish to ***place into store***.
 - Click on ***OK***.



The screenshot shows the 'Swap Out' software interface. The main form contains fields for WO Code (WO0006259), WO Description (Post Contract machine repair), Call Reference (CN0005303), Buy Back Supplier (GME001), Contract No (CO0000010), Sell Off Customer (CUS001), and Cash Sales Account. A modal window titled 'Select the equipment to be replaced' is open, displaying a table of equipment with columns: PartCode, Description, ModelNo, SerialNo, and AssetRegNo. The table lists several 'SP 2020 Sprint Colour MF Copier' units. A blue arrow points to the ellipsis button in the 'OriginalPart' field of the main form, and another blue arrow points to the 'OK' button in the modal window.

PartCode	Description	ModelNo	SerialNo	AssetRegNo
SP 2020	SP 2020 Sprint Colour MF Copier	SP 2020	SP 2020-1234	AREG000
SP 19-123456	SP 19-12 Colour Copier	SP 19-12	1912-10702	AREG000
SP 2020	SP 2020 Sprint Colour MF Copier	SP 2020	2020-147	AREG000
SP 2020	SP 2020 Sprint Colour MF Copier	SP 2020	SP 2020-147852	AREG000
SP 2020	SP 2020 Sprint Colour MF Copier	SP 2020	TEST147258	AREG000
SP 2020	SP 2020 Sprint Colour MF Copier	SP 2020	2020-7078	AREG000

- **Replacement Serial No:** Click in the text box.
- If only one item is linked to the contract then the field will auto populate with the number of that item.
- If more than one item is linked, then an **ellipsis** button will display.
 - Click on the ellipsis button to display the **Select the equipment to be replaced** screen.
 - Click on the **row** of the part code or serial number you wish to install **in place** of the original machine.
 - Click on **OK**.



The screenshot shows the 'Swap Out' form in the BPO software. The form includes fields for WO Code (WO0006259), WO Description (Post Contract machine repair), Call Reference (CN0005303), and Contract No (CO0000010). A 'Buy' button is present, and a modal window is open for selecting a replacement serial number. The modal window displays a table of replacement parts with columns for SerialNo, AssetRegNo, PartCode, PartDesc, ModelNo, and WhseName. The table lists several parts, including 'SP2020 Sprint Colour MF Co...' and 'SP1919 Sprint Colour MFPC'. A blue arrow points to the '1919-9322' part in the table. Another blue arrow points to the 'ReplacementSerialNo' field in the modal window, which is currently empty.

SerialNo	AssetRegNo	PartCode	PartDesc	ModelNo	WhseName
Z105	AREG000419	SP2020	SP2020 Sprint Colour MF Co...	SP2020	Main
Z106	AREG000420	SP2020	SP2020 Sprint Colour MF Co...	SP2020	Main
Z107	AREG000421	SP2020	SP2020 Sprint Colour MF Co...	SP2020	Main
1919-9322	AREG000207	SP1919	SP1919 Sprint Colour MFPC	1919	Main
1919-9896...	AREG000369	SP1919	SP1919 Sprint Colour MFPC	1919	Main
BrokenStock	AREG000373	SP1919	SP1919 Sprint Colour MFPC	1919	Main

- The **Destination Warehouse Name** and **Bin** and the **Source Warehouse Name** and **Bin** have been populated according to the **machine serial numbers** selected for the swap out.

SAVE SWAP OUT

- When you have finished editing the **Swap Out** screen, click on **Save**.

Swap Out - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout

Process 11 Format

WO Code: WO0006259

WO Description: Post Contract machine repair

Call Reference: CN0005303

Buy Back Supplier: GME001 Game Suppliers

Processed By: Jeff Rivers

Event Date: 17/03/2022

Contract No: CO0000010

Sell Off Customer: CUS001 Cash Sales Account

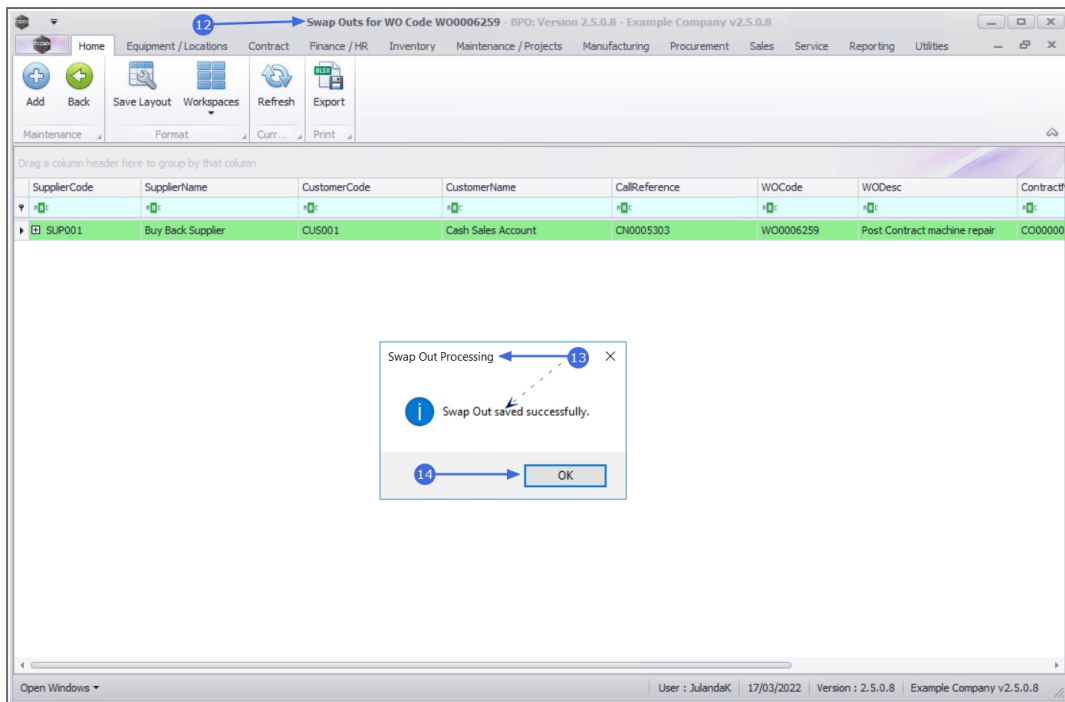
Drag a column header here to group by that column

OriginalSerialNo	OriginalPart	DestWhseName	DestBinName	PurchasePrice	ReplacementSerialNo	ReplacementPart	SourceWhseName	Source
1912-10702	SP19-123456	Assets Warehouse	Internal Assets	129.98	1919-9322	SP1919	Main Warehouse	DBN-A

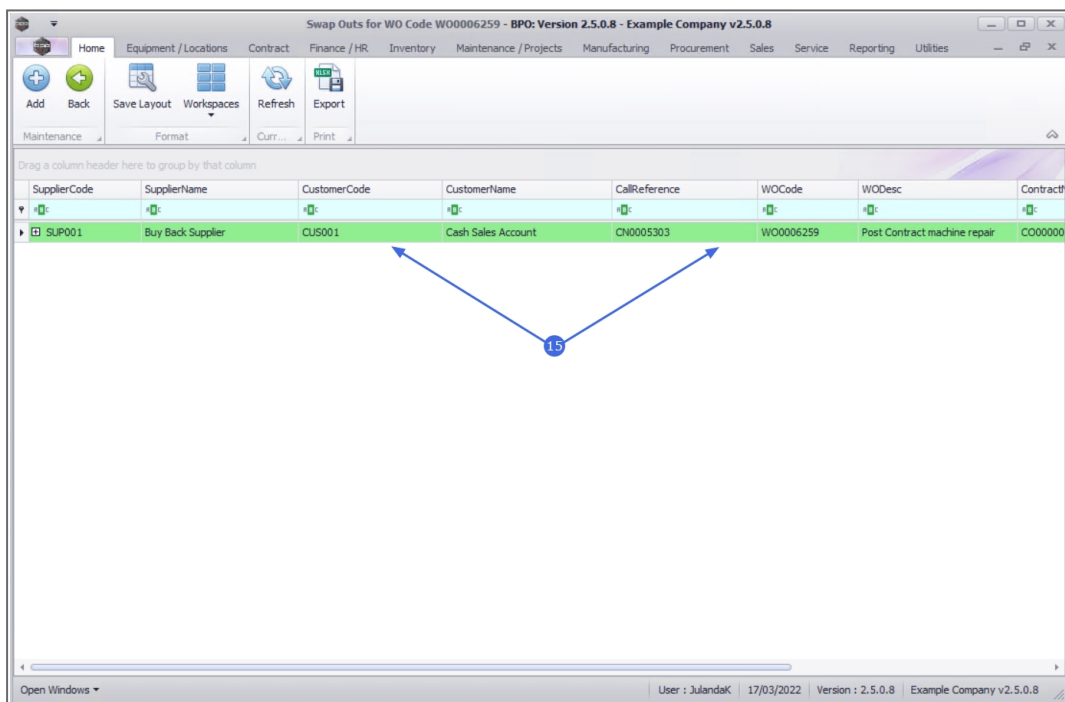
10

Open Windows User: JulandaK 17/03/2022 Version: 2.5.0.8 Example Company v2.5.0.8

12. You will return to the **Swap Outs for WO Code** screen.
13. When you receive the **Swap Out Processing** message to confirm that;
 - **Swap Out saved successfully.**
14. Click on **OK**.



15. You can now view the recorded swap out in this screen.

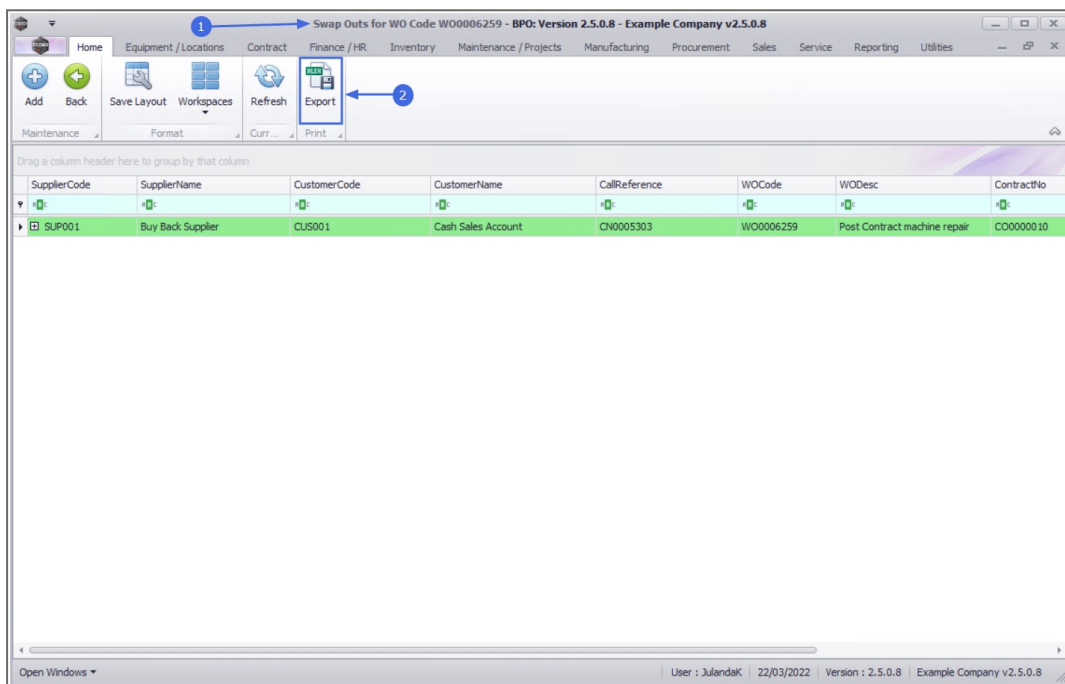


The system processes the *buy back* and *sale*.

You will need to **Print the Sales Invoice** and **Accept the Supplier Invoice** to complete the process.

EXPORT SWAP OUT LIST

1. From the *Swap Outs for WO Code* screen,
2. Click on **Export**.



3. The list of swap outs for the work order will be exported to an **Excel Spreadsheet**.
4. **Edit** and **Save** the document in Excel as required.
5. **Close** the spreadsheet to return to BPO.

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