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

[1] The machine that the call is logged agaist and will be moving into the store
[2] The 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**.

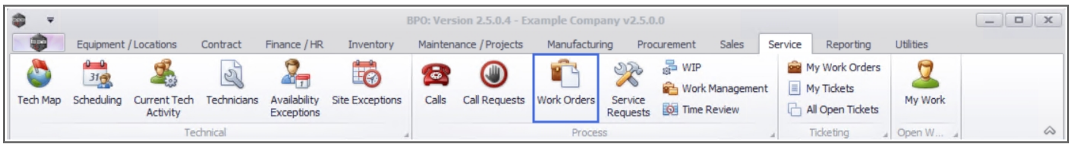
The documents processed at the end of the Swap out will depend on the Swap Out Configuration set up and what type of asset is going out:

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

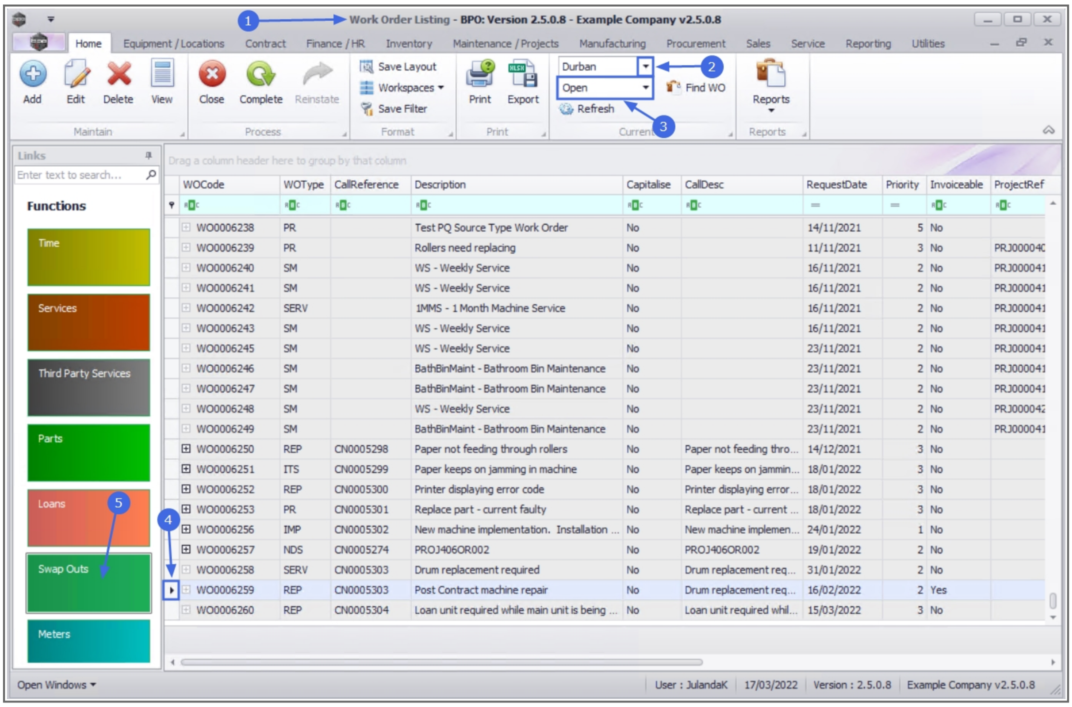
and what type of asset is coming in:

i. A serialised stock item
ii. An Internal Asset

Ribbon Access: *Service > Work Orders*



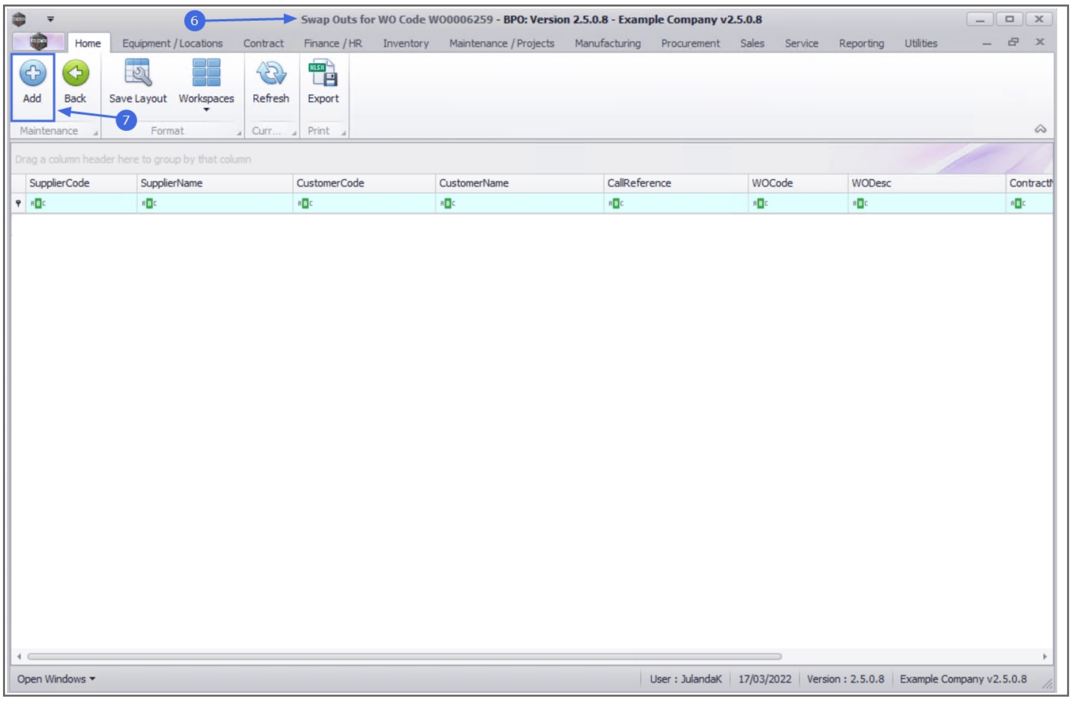
1. The ***Work Order Listing*** screen will be displayed.
2. Select the ***Site*** where the work order was issued.
    - The example has ***Durban*** selected.
3. Set the ***Status*** to ***Open***.
4. Click on the ***row*** of the work order you wish to process a ***swap out*** for.
5. Click on the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



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

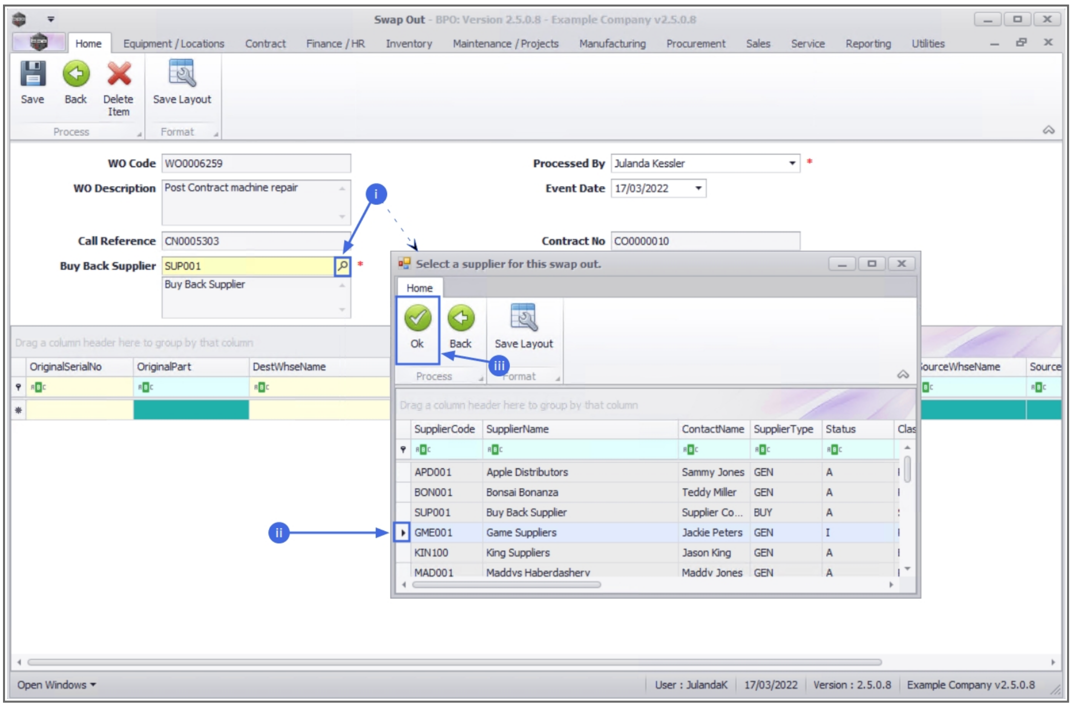
ADD SWAP OUT

7. Click on ***Add***.

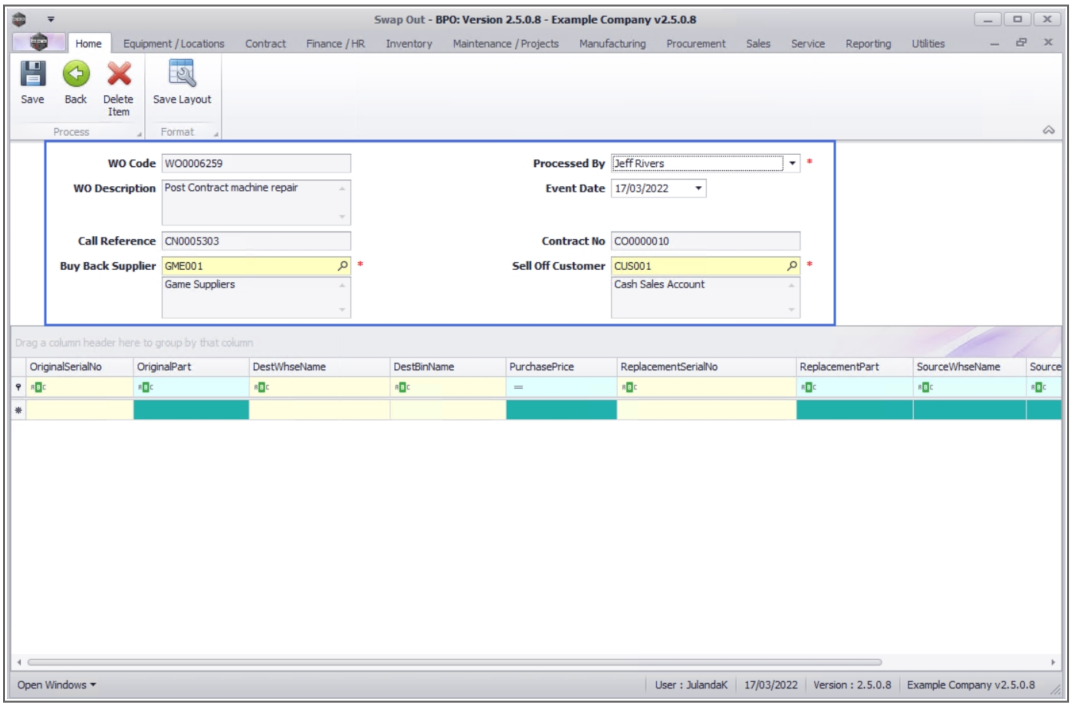


8. The ***Swap Out*** screen will be displayed.

- **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***.

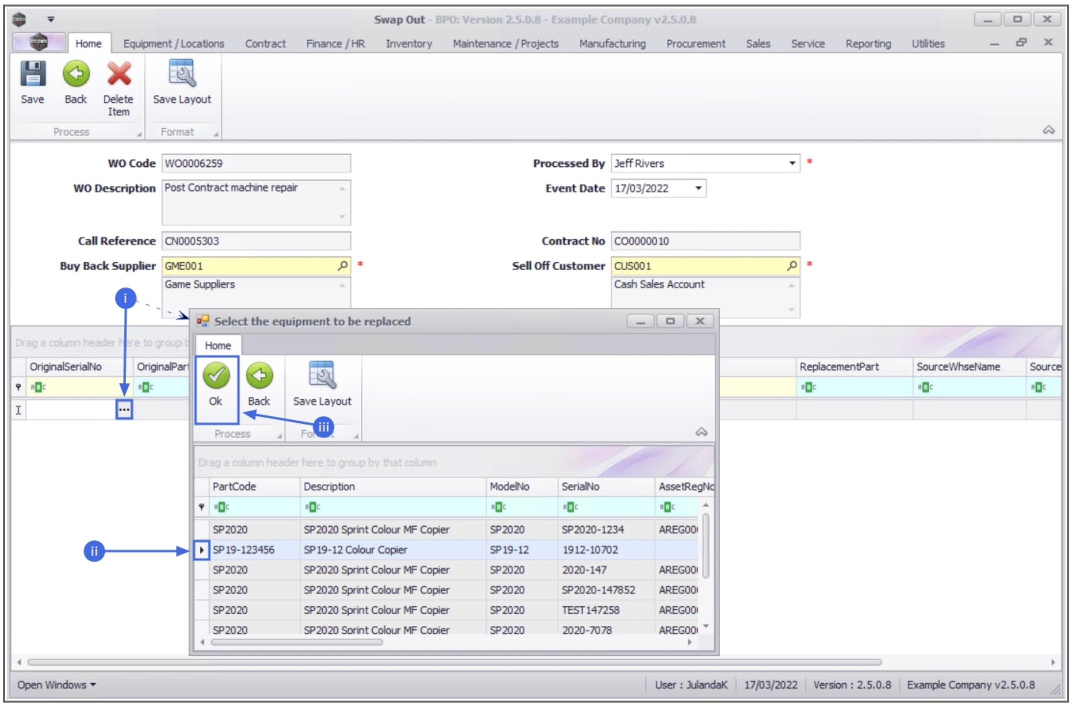


- **Processed By:** This field will auto populate with the name of the person currently creating the swap out. Click on the down ***arrow*** to select an alternative person, if required.
- **Event Date:** The current date will be displayed in the field. Click on the down ***arrow*** to select an alternative 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.

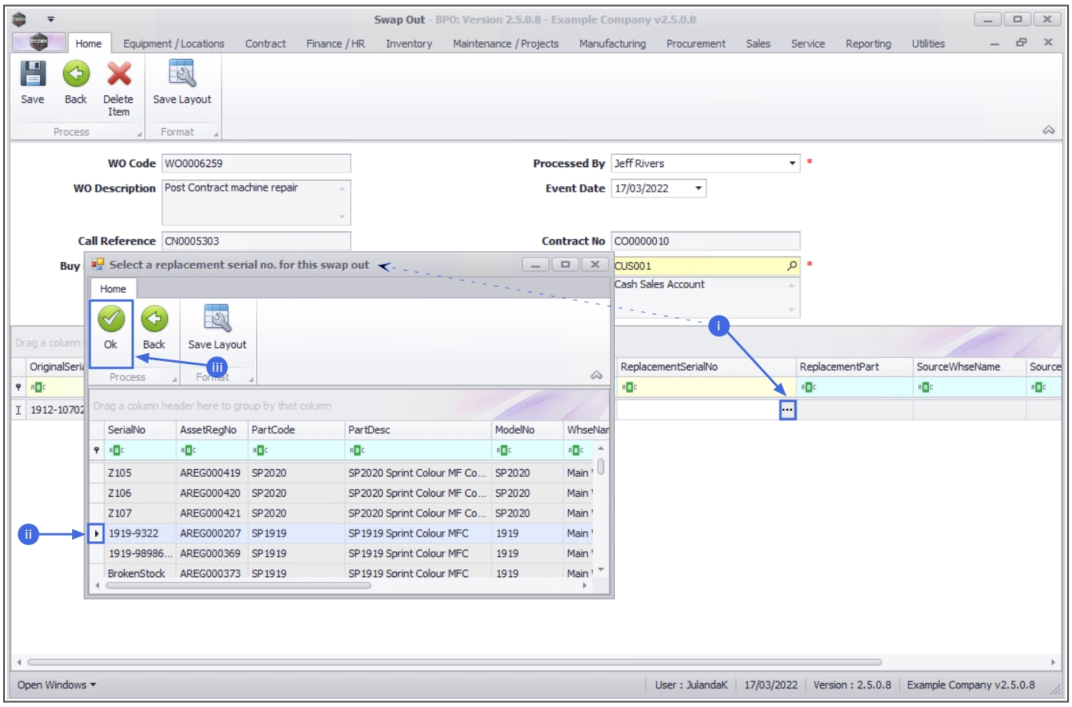


DATA GRID

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



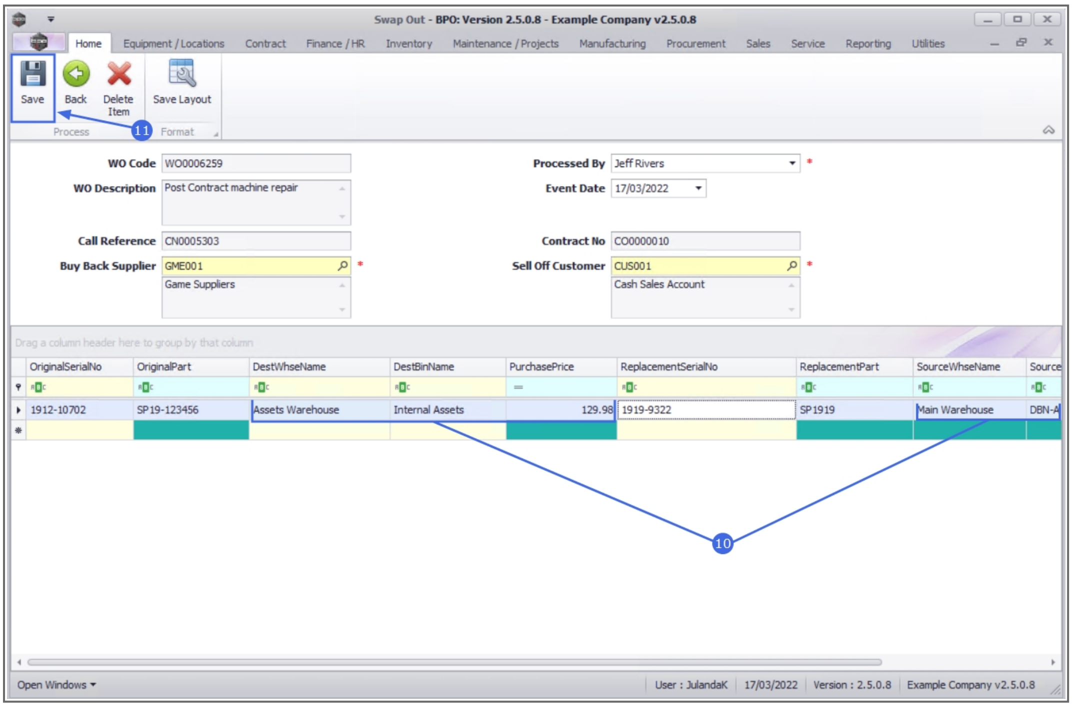
- **Replacement Serial No:** Click in the text box.
- If only one item is linked to the contract then the field will auto populate with the number of that item.
- If more than one item is linked, then an ***ellipsis*** button will display.
  1. Click on the ellipsis button to display the ***Select the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



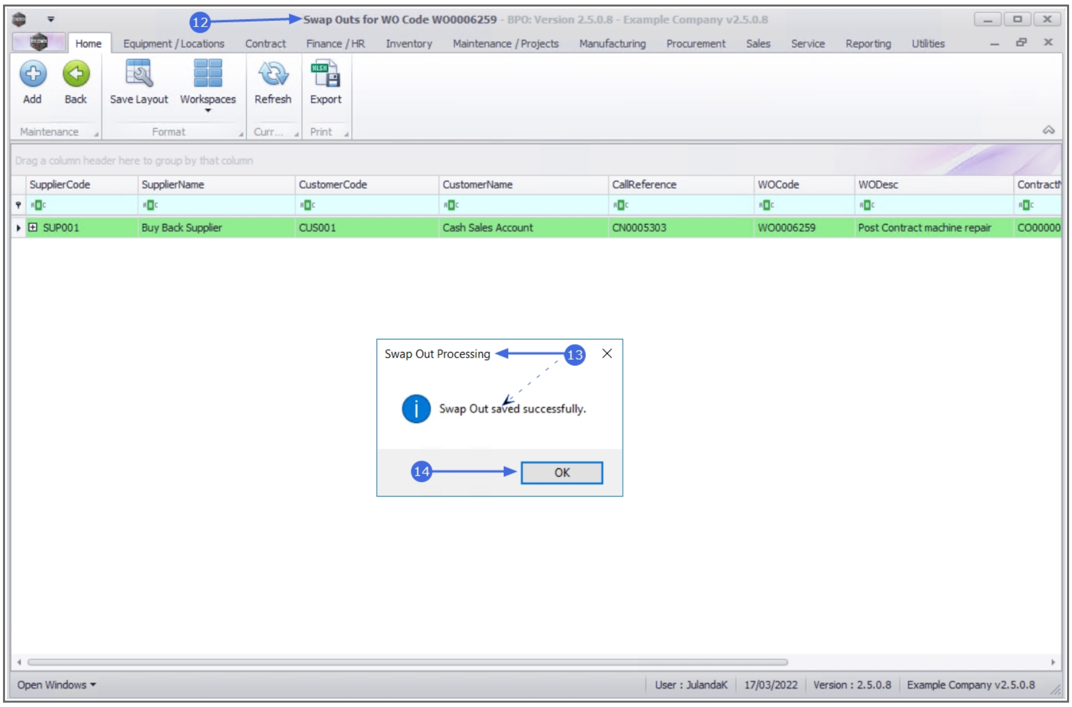
10. The ***Destination Warehouse Name*** and ***Bin*** and the ***Source Warehouse Name*** and ***Bin*** have been populated according to the ***machine serial numbers*** selected for the swap out.

SAVE SWAP OUT

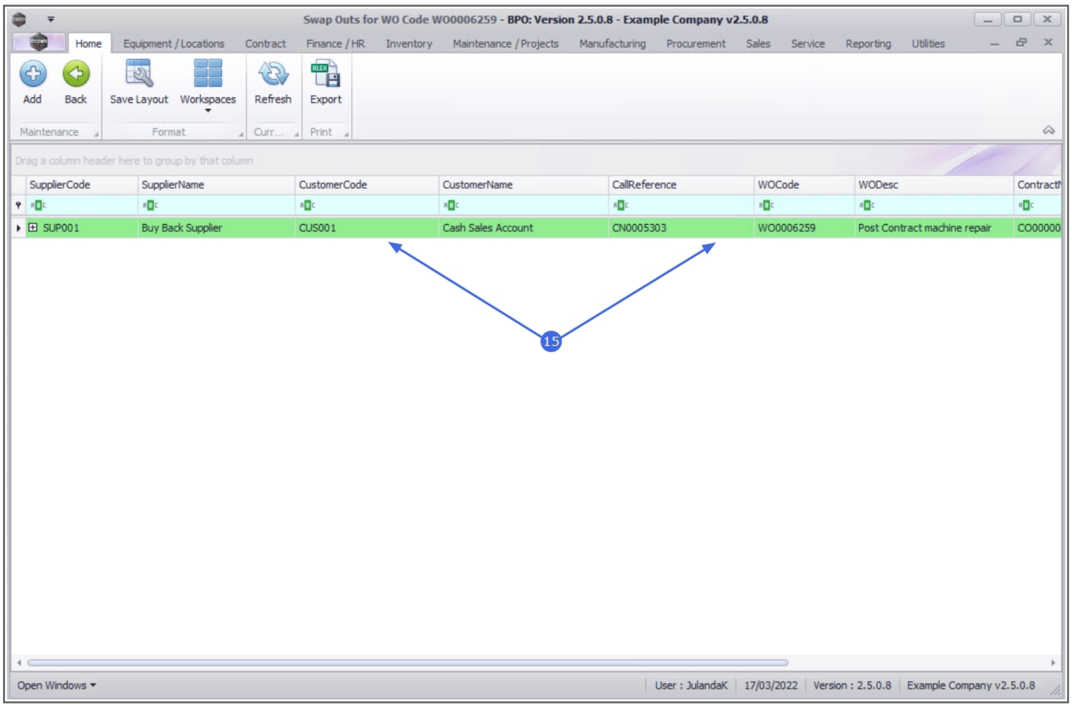
11. When you have finished editing the **Swap Out** screen, click on ***Save***.



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.

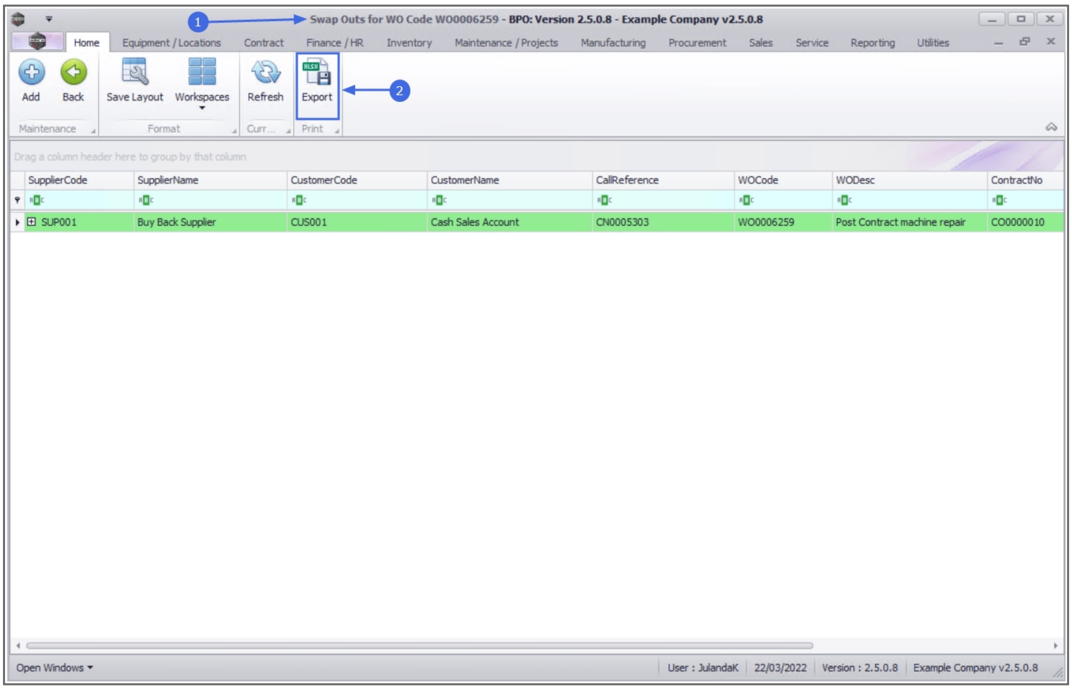


The system processes the ***buy back*** and ***sale***.

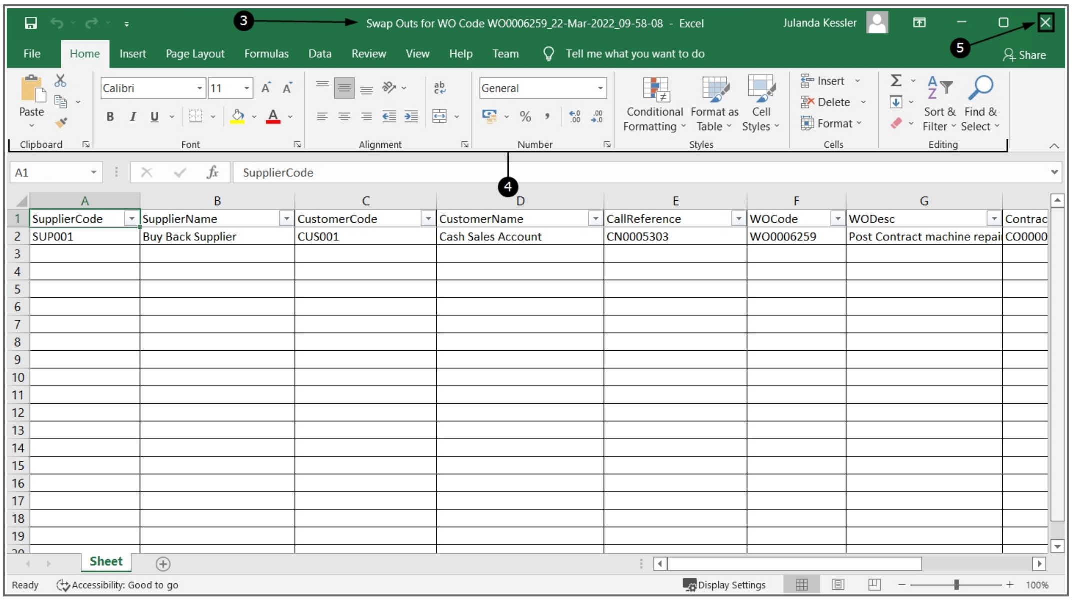
You will need to Print the Sales Invoice and Accept the Supplier Invoice to complete the process.

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.


Swap Outs for WO Code WO0006259_22-Mar-2022_09-58-08 - Excel
3
4
5
SupplierCode
SupplierName
CustomerCode
CustomerName
CallReference
WOCode
WODesc
SUP001
Buy Back Supplier
CUS001
Cash Sales Account
CN0005303
WO0006259
Post Contract machine repai
Sheet

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