

# SERVICE

## CALLS – 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** (the machine that the call is logged against and that will be moving into the store), and the **replacement machine** (the machine that is being sent out in its place).

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.

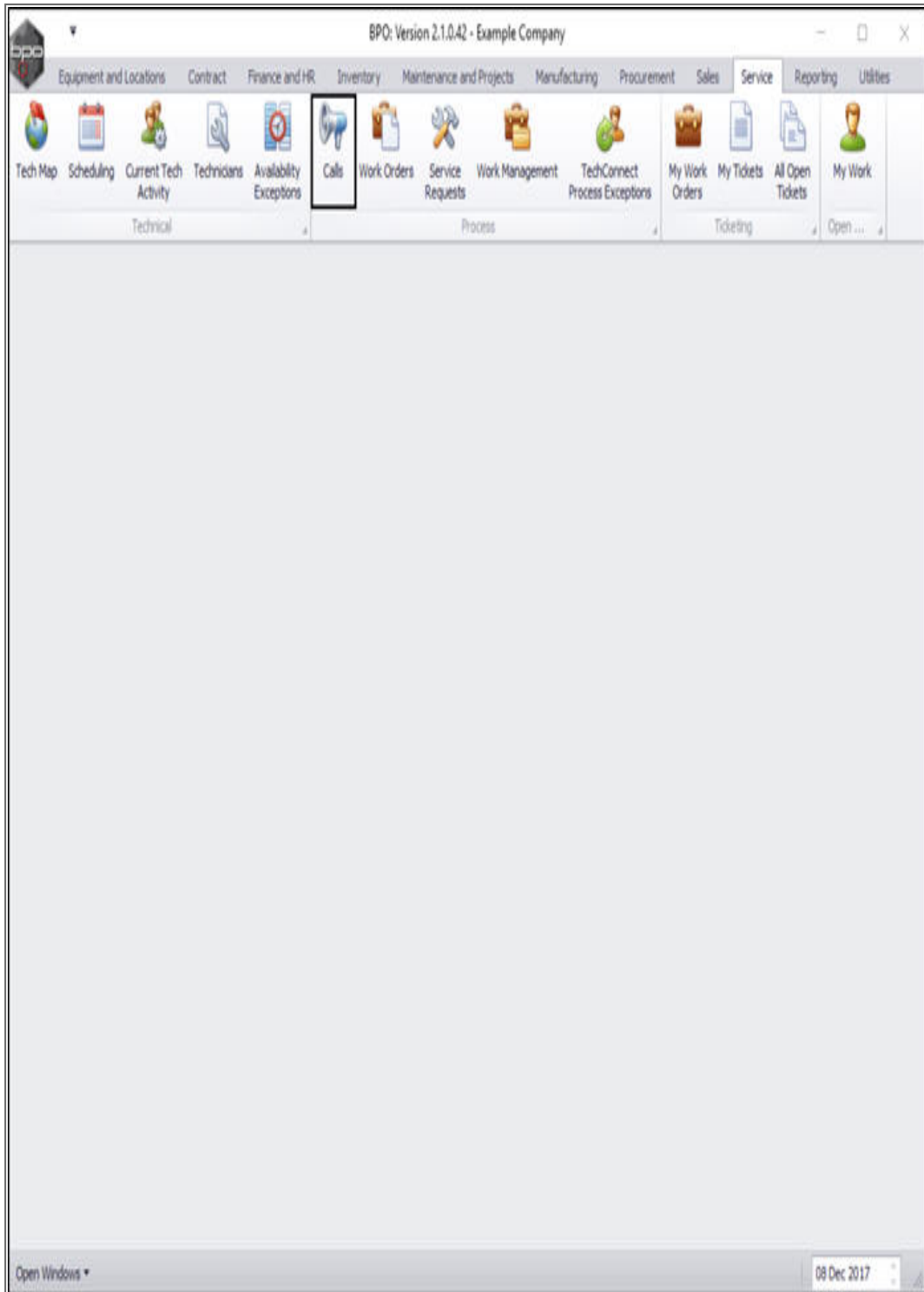
This process is predominantly used to swap out **accessories** linked to machines on contract. The original item will be removed from the contract and the replacement item will be linked to the contract.

- **Note:** This process does not re-link fees and / or meters and is not recommended for swapping out machines.

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**Ribbon Access:** *Service > Calls*

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The **Call Listing** screen will be displayed.

- Select the **site** and **status**.
  - In this image, **Durban** is selected as the site and the status is set to **New**.

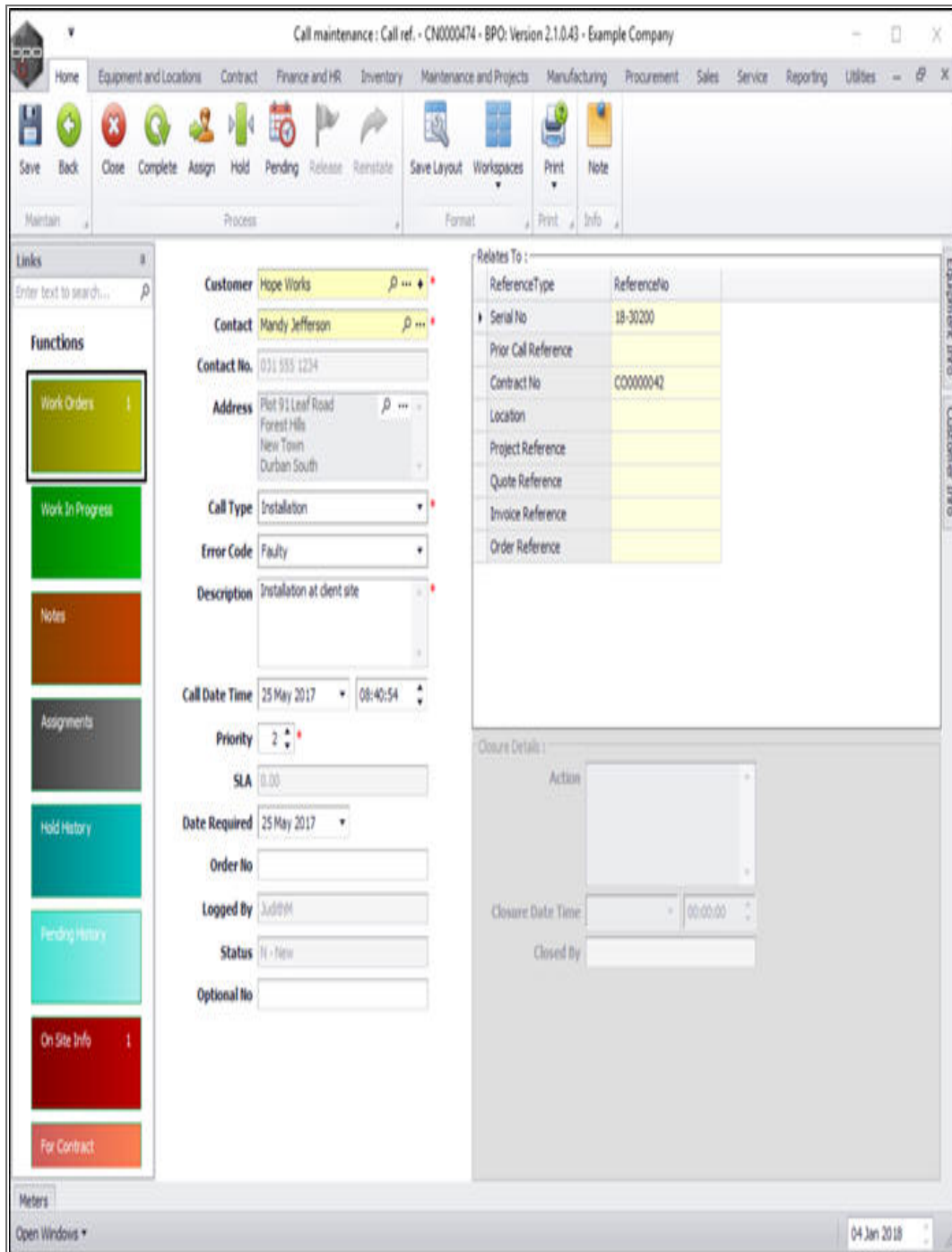
CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020-10
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-10
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per ...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Main...	New	Awaiting Acceptance	Belinda S...	an123
CH0000493	15 Jun 2017	12:28:25	Test OriSte Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INVT	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bclass Quick Part Return	DR	Select Call Type	New	UnAssigned		20-8529
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Requirem...	New	UnAssigned		20-8529
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		tes0978
CH0000474	25 May 2017	08:40:54	Installation at client site	INVT	Installation	New	UnAssigned		18-3020
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-8529
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-8529

- Click on the **row selector** in front of the **call** that you wish to process a **swap out machine** for.
- Click on **Edit**.

The screenshot displays the 'Call Listing' application interface. The 'Edit' button in the toolbar is highlighted with a red box. The main data table contains the following information:

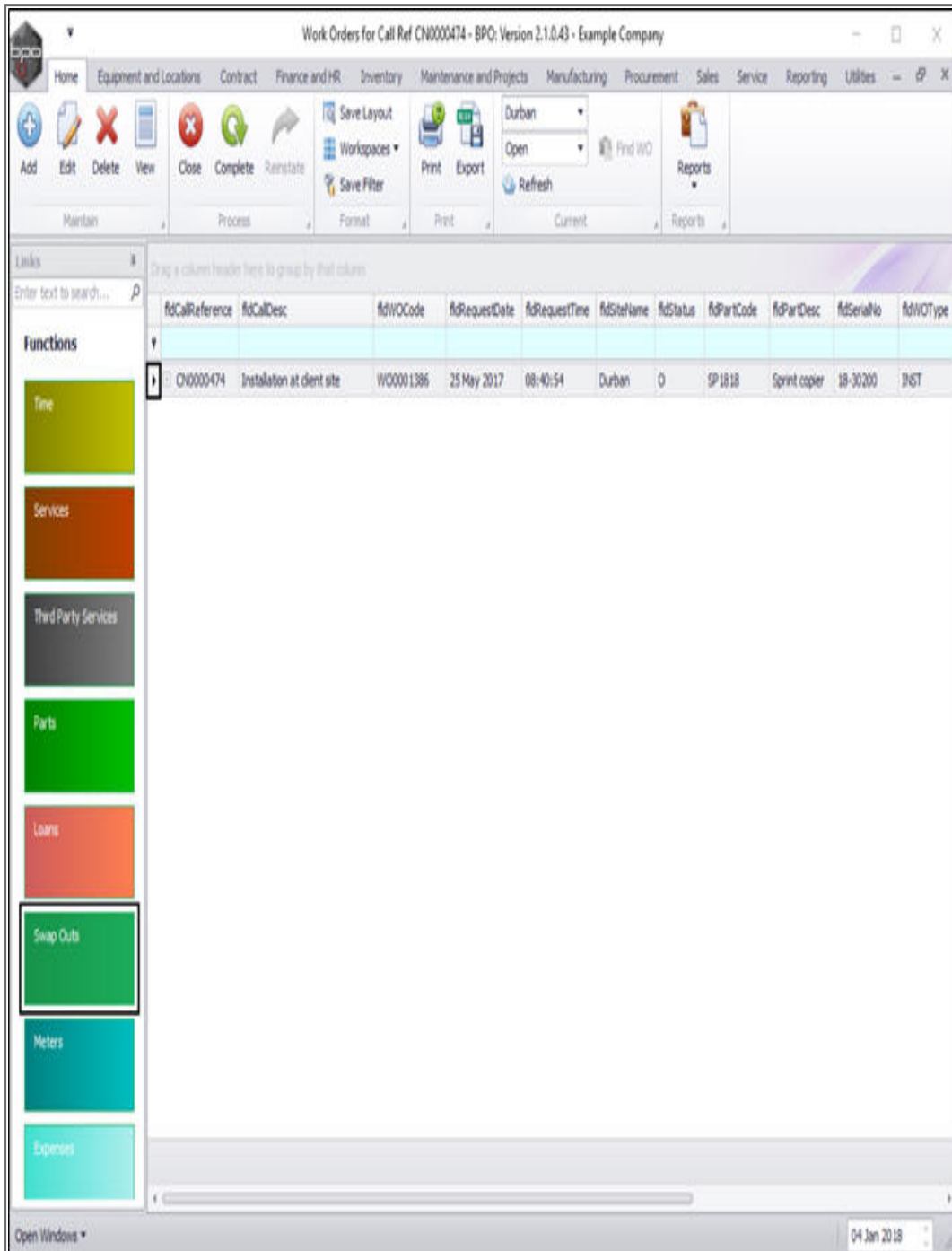
CallReference	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo	ErrorC
CH0000509	15 Dec 2017	10:27:25	Machine no receiving fax ...	IT	IT Requirement	New	Unassigned			EC
CH0000507	12 Dec 2017	13:17:05	Paper not feeding through...	REP	Repar	New	Unassigned		2020-103...	FA
CH0000504	22 Nov 2017	12:46:33	New Deal Rental Installat...	NDR	New Deal Rental	New	Unassigned			
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	Unassigned			
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...		
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	Unassigned		2020-102...	
CH0000497	20 Jun 2017	09:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652365	
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per...	SM	Scheduled Main...	New	Awaiting Acceptance	Belnda S...	5D132413...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Main...	New	Awaiting Acceptance	Belnda S...	sin123	
CH0000493	15 Jun 2017	12:28:25	Test CrNote Totals for Pr...	NDS	New Deal Sale	New	Unassigned			
CH0000490	08 Jun 2017	14:50:42	1234	NDS	New Deal Sale	New	No Signature			
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	Unassigned			
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INST	Installation	New	Unassigned			
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	Unassigned			
CH0000483	31 May 2017	16:18:35	Bdass Quick Part Return	DR	Select Call Type	New	Unassigned		20-852963	
CH0000481	31 May 2017	15:11:20	Quick Part Return v2. 0.7	PR	Parts Requirem...	New	Unassigned		20-852963	
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...		
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	Unassigned		14-9652365	
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	Unassigned		2020-43257	EC
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	Unassigned		test987654	FA
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	Unassigned		18-30200	FA
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	Unassigned		1020-10102	COH
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	Unassigned		2020-43256	COH

- The **Call maintenance: Call ref. - [ ]** screen will be displayed.
- Click on the **Work Orders** tile.

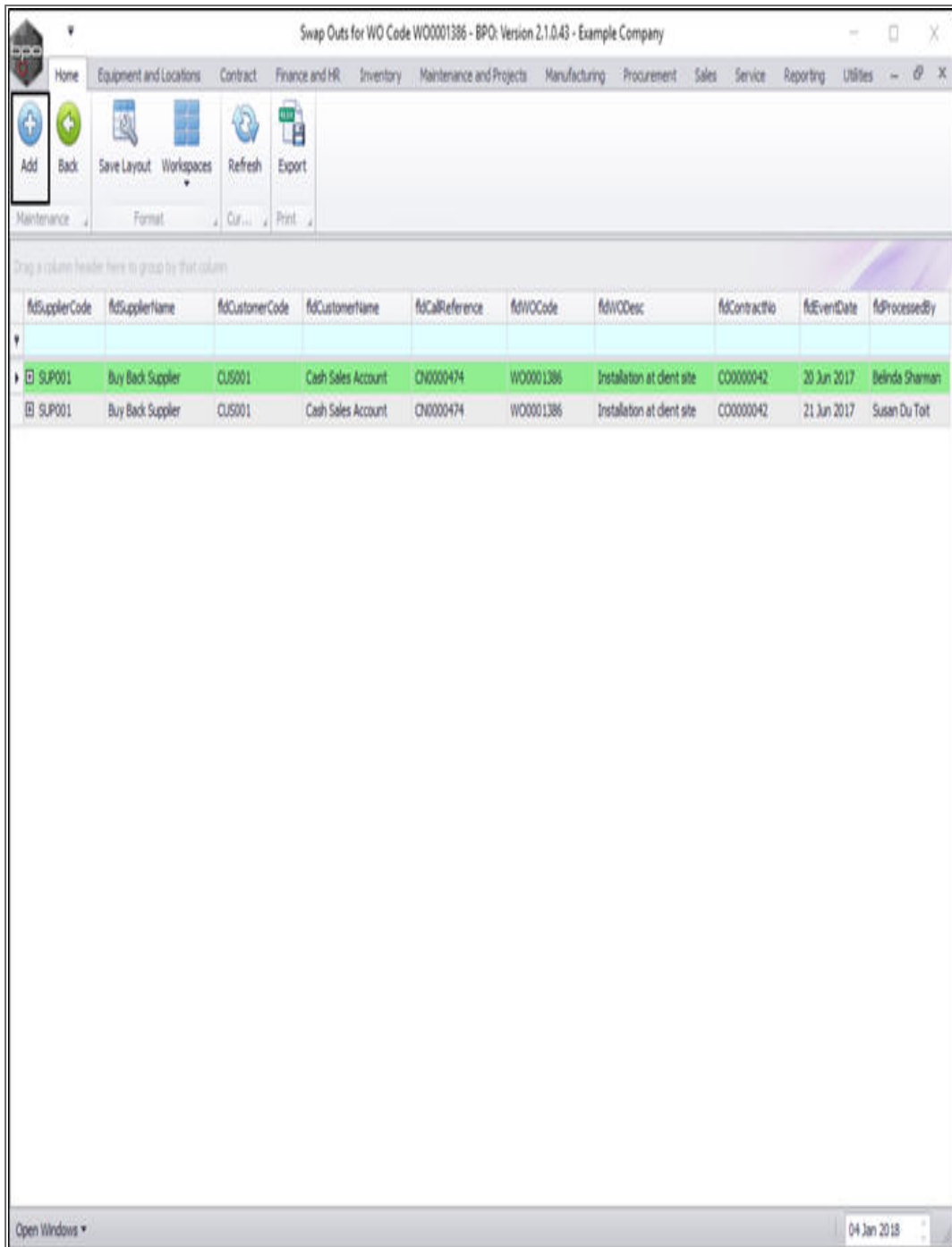


The **Work Orders for Call Ref [ ]** screen will be displayed.

- Click on the **row selector** in front of the **work order** that you wish to process a **swap out machine** for.
- Click on the **Swap Outs** tile.



- The **Swap Outs for WO Code [ ]** screen will be displayed.
- Click on **Add**.



fdSupplierCode	fdSupplierName	fdCustomerCode	fdCustomerName	fdCallReference	fdWOCode	fdWODesc	fdContractNo	fdEventDate	fdProcessedBy
SUP001	Buy Back Supplier	CU5001	Cash Sales Account	CN0000474	W0001386	Installation at client site	C00000042	20 Jun 2017	Belinda Sherman
SUP001	Buy Back Supplier	CU5001	Cash Sales Account	CN0000474	W0001386	Installation at client site	C00000042	21 Jun 2017	Susan Du Toit

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

- **WO Code:** This will auto populate with the WO code initially selected.
- **WO Description:** This will auto populate with the description of the work order initially selected.
- **Call Reference:** This will auto populate with the call reference number initially selected.
- **Buy Back Supplier:** This will auto populate with the code number and name of the company set up as the default Buy Back Supplier but you can click on the Search button and select an alternative Buy Back Supplier if required.
- **Processed By:** This will be auto populated with the person currently creating the swap out but you can click on the drop-down arrow and select an alternative person if required.
- **Event Date:** This will auto populate with the current time but you can click on the drop-down arrow and select an alternative date if required.
- **Contract No:** This will auto populate with the contract number linked to this call if applicable.
- **Sell Off Customer:** This will auto populate with Cash Sales Account code and name but you can click on the Search button and select an alternative Sell Off Customer if required.

Swap Out - BPO: Version 2.1.0.43 - Example Company

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

Save | Back | Save Layout

Process | Format

WO Code: WO0001386 | Processed By: Sarah Milder

WO Description: Installation at dent site | Event Date: 06 Jan 2018

Call Reference: CH0000474 | Contract No: CO0000042

Buy Back Supplier: SUP001 | Sell Off Customer: CUS001

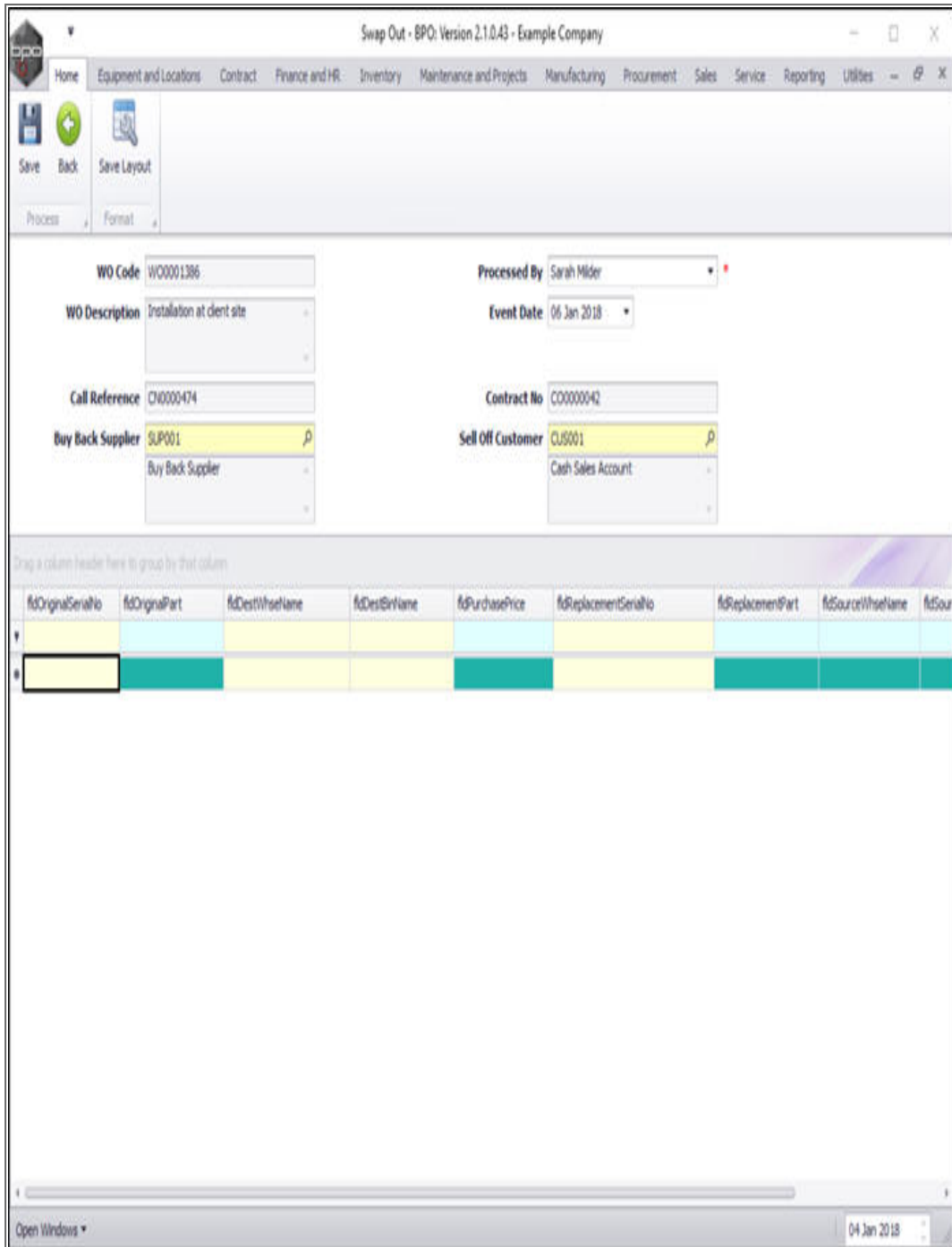
Buy Back Supplier | Cash Sales Account

Drag a column header here to group by that column

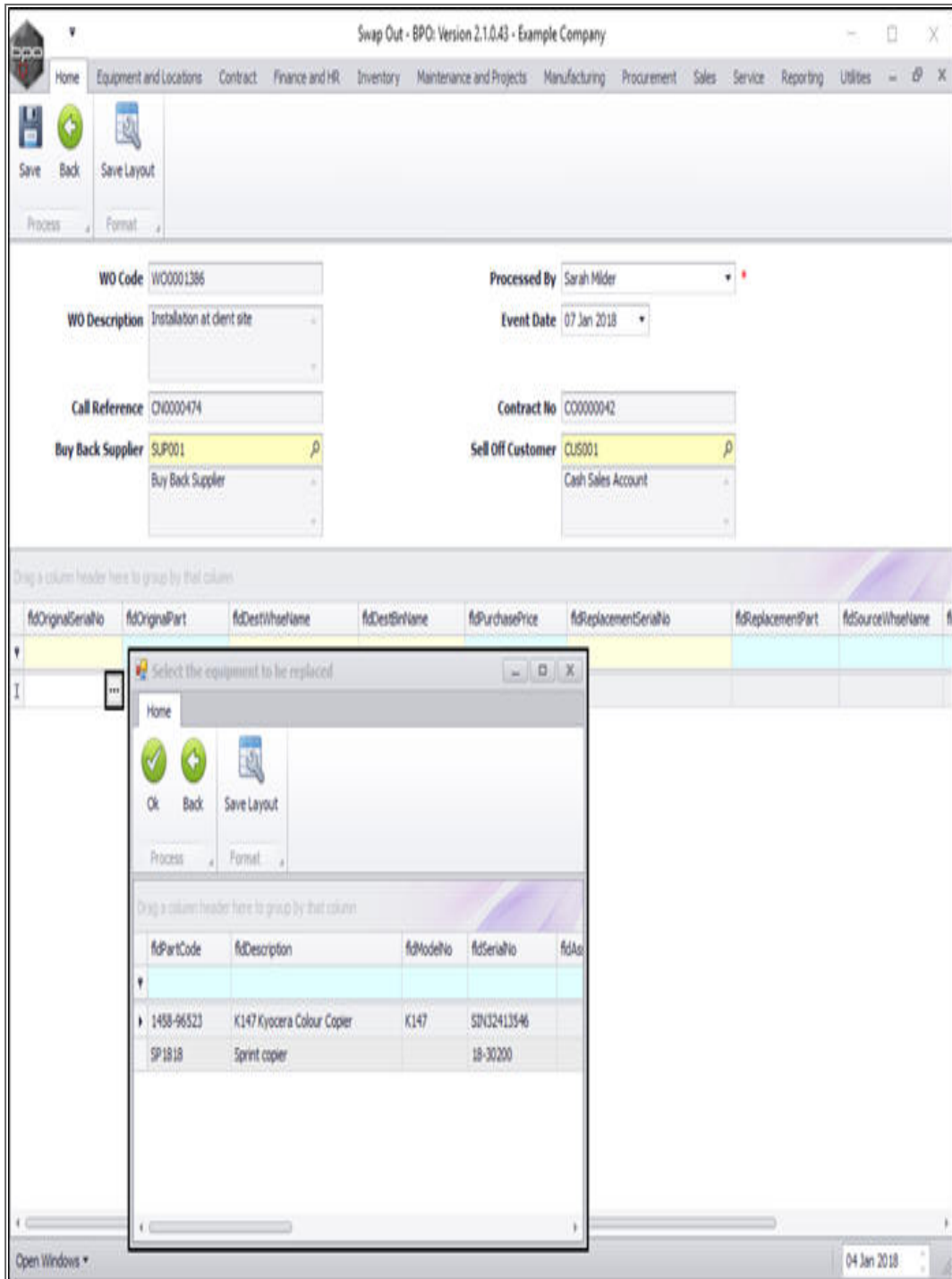
fdOriginalSerialNo	fdOriginalPart	fdDestWlseName	fdDestBinName	fdPurchasePrice	fdReplacementSerialNo	fdReplacementPart	fdSourceWlseName	fdSourceBinName

Open Windows | 04 Jan 2018

- Click in the text box in the **Original Serial No** Column.



- An *ellipsis* button will be revealed.
- Click on this button to display the *Select the equipment to be replaced* pop up screen.



- Click on the **row selector** in front of the **part code / serial no.** of the **machine** that you wish to place into **store**.
- Click on **Ok**.

Swap Out - BPO: Version 2.1.0.43 - Example Company

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

Save | Back | Save Layout

Process | Format

WO Code: W0001386

WO Description: Installation at client site

Call Reference: C10000474

Buy Back Supplier: SLP001

Processed By: Sarah Milder

Event Date: 07 Jan 2018

Contract No: C00000042

Sell Off Customer: CU0001

fdOriginalSerialNo	fdOriginalPart	fdDestWhseName	fdDestBinName	fdPurchasePrice	fdReplacementSerialNo	fdReplacementPart	fdSourceWhseName

Drag a column header here to group by that column

Select the equipment to be replaced

Home

OK | Back | Save Layout

Process | Format

Drag a column header here to group by that column

fdPartCode	fdDescription	fdModelNo	fdSerialNo	fdAs
1458-96523	Kyocera Colour Copier	K147	S1132413546	
SP1818	Sprint copier		18-30200	

Open Windows | 04 Jan 2018

- Click in the text box in the **Replacement Serial No** Column.

Swap Out - BPO: Version 2.1.0.43 - Example Company

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

Save | Back | Save Layout

Process | Format

WO Code: W00001386 | Processed By: Sarah Milder

WO Description: Installation at client site | Event Date: 07 Jan 2018

Call Reference: CH0000474 | Contract No: C00000042

Buy Back Supplier: SUP001 | Sell Off Customer: CU5001

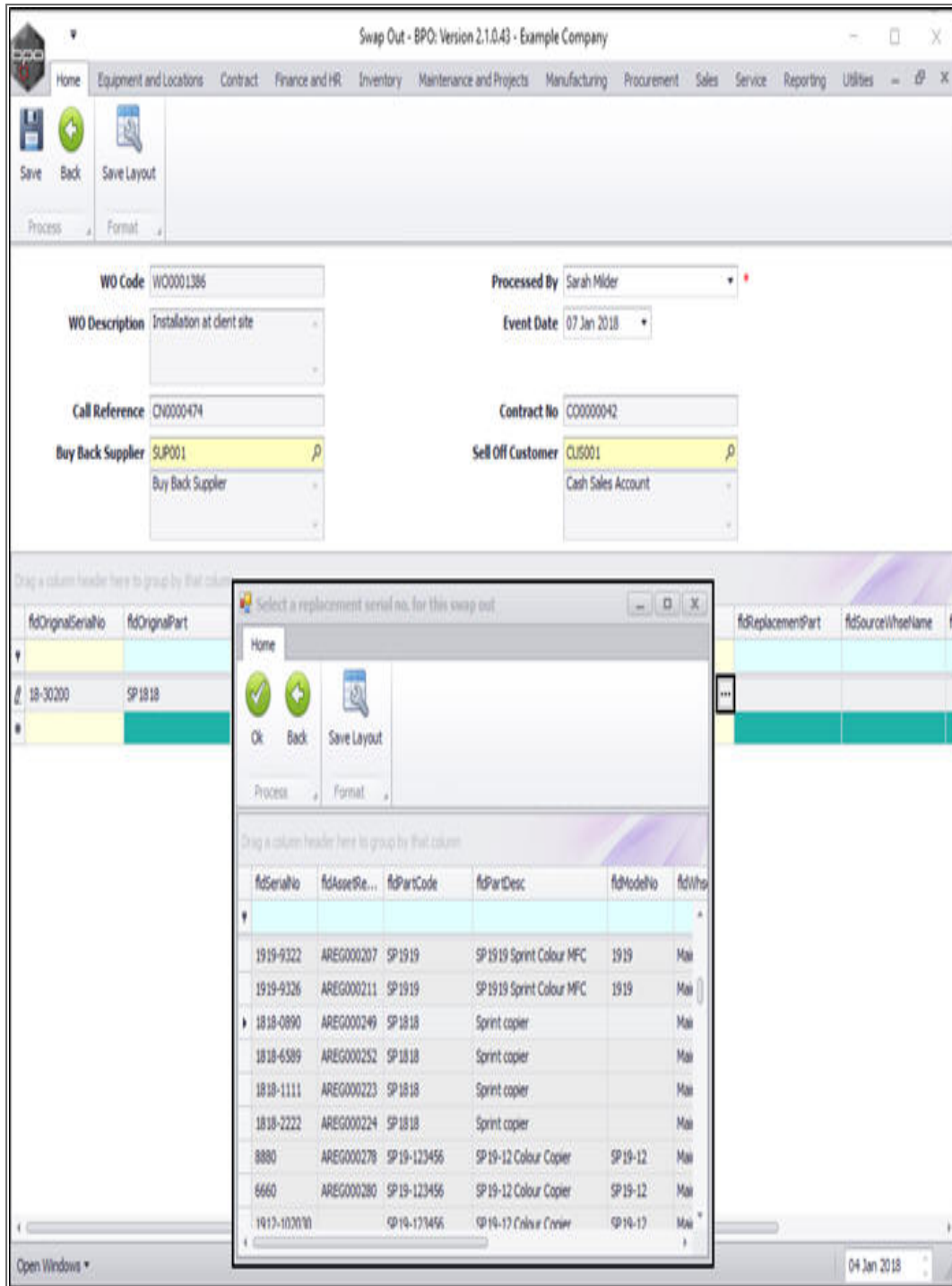
Buy Back Supplier | Cash Sales Account

Drag a column header here to group by that column

fdOriginalSerialNo	fdOriginalPart	fdDestWhseName	fdDestBinName	fdPurchasePrice	fdReplacementSerialNo	fdReplacementPart	fdSourceWhseName
18-30200	SP1818	Assets Warehouse	Internal Assets	0.00			

Open Windows | 04 Jan 2018

- An ***ellipsis*** button will be revealed.
- Click on this button to display the ***Select a replacement serial no. for this swap out*** pop up screen.



- Click on the **row selector** in front of the **serial no.** of the **machine** that you wish to install **in place** of the original machine.
- Click on **Ok**.

Swap Out - BPO: Version 2.1.0.43 - Example Company

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

Save | Back | Save Layout

Process | Format

WO Code: W0001386 | Processed By: Sarah Milder

WO Description: Installation at client site | Event Date: 07 Jan 2018

Call Reference: C0000474 | Contract No: C0000042

Buy Back Supplier: SUP001 | Sell Off Customer: CU5001

Buy Back Supplier: Buy Back Supplier | Sell Off Customer: Cash Sales Account

Drag a column header here to group by that column

fdOriginalSerialNo	fdOriginalPart	fdReplacementPart	fdSourceWhseName
18-30200	SP 1818		

Select a replacement serial no. for this swap out

Home | Ok | Back | Save Layout

Process | Format

Drag a column header here to group by that column

fdSerialNo	fdAssetRe...	fdPartCode	fdPartDesc	fdModelNo	fdWho
1919-9322	AREG000207	SP 1919	SP 1919 Sprint Colour MFC	1919	Mai
1919-9326	AREG000211	SP 1919	SP 1919 Sprint Colour MFC	1919	Mai
1818-0890	AREG000249	SP 1818	Sprint copier		Mai
1818-6589	AREG000252	SP 1818	Sprint copier		Mai
1818-1111	AREG000223	SP 1818	Sprint copier		Mai
1818-2222	AREG000224	SP 1818	Sprint copier		Mai
8880	AREG000278	SP 19-123456	SP 19-12 Colour Copier	SP 19-12	Mai
6660	AREG000280	SP 19-123456	SP 19-12 Colour Copier	SP 19-12	Mai
1917-102010		SP 19-173456	SP 19-17 Colour Copier	SP 19-17	Mai

Open Windows | 04 Jan 2018

- You will see that the **Destination Warehouse Name** and **Bin** and the **Source Warehouse Name** and **Bin** have auto populated

according to the *machine serial numbers* selected for the swap out.

The screenshot shows the 'Swap Out' software interface. At the top, the title bar reads 'Swap Out - BPO: Version 2.1.0.43 - Example Company'. Below the title bar is a navigation menu with options: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar on the left contains 'Save', 'Back', 'Save Layout', 'Process', and 'Format' buttons.

The main form area contains several fields:

- WO Code:** WO0001386
- WO Description:** Installation at client site
- Call Reference:** CH0000474
- Buy Back Supplier:** SUP001
- Processed By:** Sarah Milder
- Event Date:** 07 Jan 2018
- Contract No:** C00000042
- Sell Off Customer:** CUS001

Below the form fields is a table with the following columns: fdOriginalSerialNo, fdOriginalPart, fdDestWhseName, fdDestBinName, fdPurchasePrice, fdReplacementSerialNo, fdReplacementPart, and fdSourceWhseName. The table contains one data row:

fdOriginalSerialNo	fdOriginalPart	fdDestWhseName	fdDestBinName	fdPurchasePrice	fdReplacementSerialNo	fdReplacementPart	fdSourceWhseName
18-30200	SP1818	Assets Warehouse	Internal Assets	1 165.00	1818-0990	SP1818	Main Warehouse

At the bottom of the window, there is a status bar with 'Open Windows' on the left and '04 Jan 2018' on the right.

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

Swap Out - BPO: Version 2.1.0.43 - Example Company

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

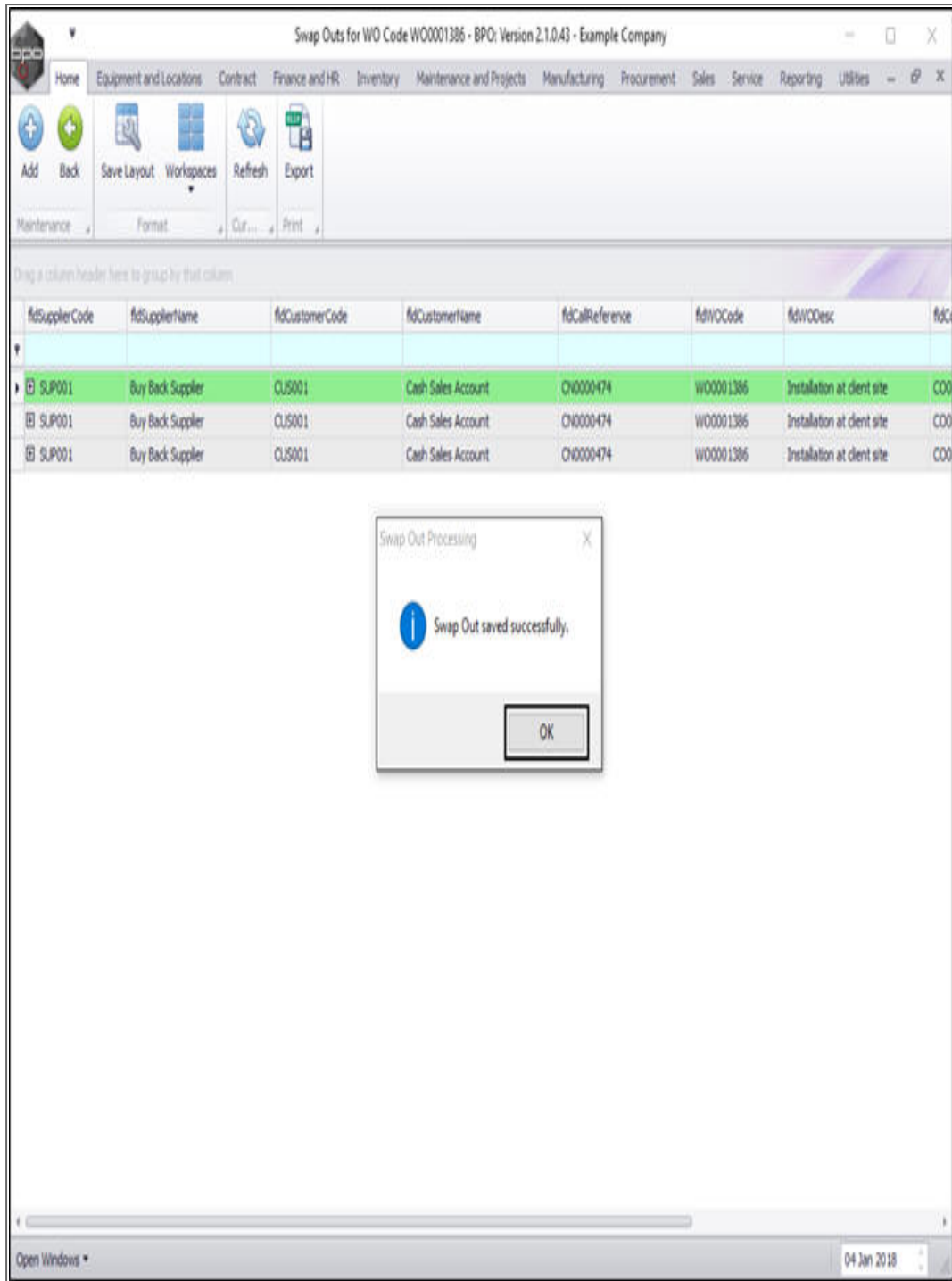
Save Back Save Layout Process Format

WO Code: W0001386  
 WO Description: Installation at client site  
 Call Reference: C10000474  
 Buy Back Supplier: SUP001  
 Processed By: Sarah Milder  
 Event Date: 07 Jan 2018  
 Contract No: C0000042  
 Sell Off Customer: CJ5001

fdOriginalSerialNo	fdOriginalPart	fdDestWhseName	fdDestBinName	fdPurchasePrice	fdReplacementSerialNo	fdReplacementPart	fdSourceWhseName
18-30200	SP1818	Assets Warehouse	Internal Assets	1 165.00	1818-0890	SP1818	Main Warehouse

Open Windows 04 Jan 2018

- You will return to the *Swap Outs for WO Code [ ]* screen.
- A *Swap Out Processing* message box will pop up informing you that;
  - *Swap Out saved successfully.*
- Click on **OK**.



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

Swap Outs for WO Code W00001386 - BPO: Version 2.1.0.43 - Example Company

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

Add | Back | Save Layout | Workspaces | Refresh | Export

Maintenance | Format | Cur... | Print

Drag a column header here to group by that column

fdSupplierCode	fdSupplierName	fdCustomerCode	fdCustomerName	fdCallReference	fdWOCode	fdWODesc	fdContractio	fdEventDate	fdProcessedBy
☐ SUP001	Buy Back Supplier	CUS001	Cash Sales Account	ON0000474	W00001386	Installation at client site	CO0000042	20 Jun 2017	Belinda Sherman
☐ SUP001	Buy Back Supplier	CUS001	Cash Sales Account	ON0000474	W00001386	Installation at client site	CO0000042	21 Jun 2017	Susan Du Toit
☐ SUP001	Buy Back Supplier	CUS001	Cash Sales Account	ON0000474	W00001386	Installation at client site	CO0000042	07 Jan 2018	Sarah Milder

Open Windows | 04 Jan 2018

## Notes:

- 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.

MNU.122.025

