

CORE & RETURN MODULE

The Core & Return Module has been developed to assist in notifying both Techs and Office staff of parts that need to be brought back to the office to return to the manufacturer. These would be core parts, defective parts, pre-diagnose parts that are not needed, or parts that were incorrectly ordered.

CORE & RETURN SETTINGS

- Franchise Setup
 - Return Location
 - After the tech returns the part to the office, but before it is sent back to the manufacturer, the part will be held in a “Default Return Location” to prevent it from being seen in the tech’s location, but still show it as being in the office. If a Default Return Location is not selected, the part will remain in the Tech’s location until returned to the manufacturer.
 - It is recommended to create a new Return Location for this purpose if you are not already using Return locations.

Franchise

Options ▾ Save Discard

Name:	<input type="text" value="Mr Appliance Training"/>
Franchisee Name:	<input type="text"/>
Franchise Consultant:	<input type="text"/>
Primary Territory:	<input type="text" value="MRA Training Territory"/>
Return Location:	<input type="text" value="Returns"/>
PBXFranchiseID:	<input type="text"/>
PBX Provider:	<input type="text"/>
Country:	<input type="text" value="United States"/>

- Vendor
 - Return Policy & Core Return Policy
 - This field is used in the Core & Return module to identify the time remaining before a part can no longer be returned. There may be different policies for Cores and regular returns. The fields are defaulted to 30 Days. SW will look at the PO date for the part and count down to 0 from there according to the number of days entered in the Return Policy field.
 - 14 days prior to reaching the Return policy limit, based on the PO date, the row will turn yellow.

- Example: PO date is 10/1/18, Return Policy is 30 days. On 10/16/18 the row will turn yellow.
- 5 days prior to reaching the Return policy limit, based on the PO date, the row will turn red.
 - Example: PO date is 10/1/18, Return Policy is 30 days. On 10/26/18, the row will turn red, meaning there are only 5 days left to return the part.

Marcone

Options ▾ Save Discard

Vendor

Name: **Terms:**

Website: **Active:**

Return Policy Days:

Core Return Policy Days:

Contact Name:

ID:1 Created:2016-07-27 Updated:2018-11-28

OFFICE IDENTIFICATION OF RETURN PARTS

The office can notify the tech that a part needs to be returned by clicking on the “Tag” button on the PO. Once the button is clicked, it will change to an ‘x’. Clicking the ‘x’ removes the “Tag” from the part. Sometimes a manufacturer requires the old part to be returned when providing a replacement part.

Purchase Order Parts List

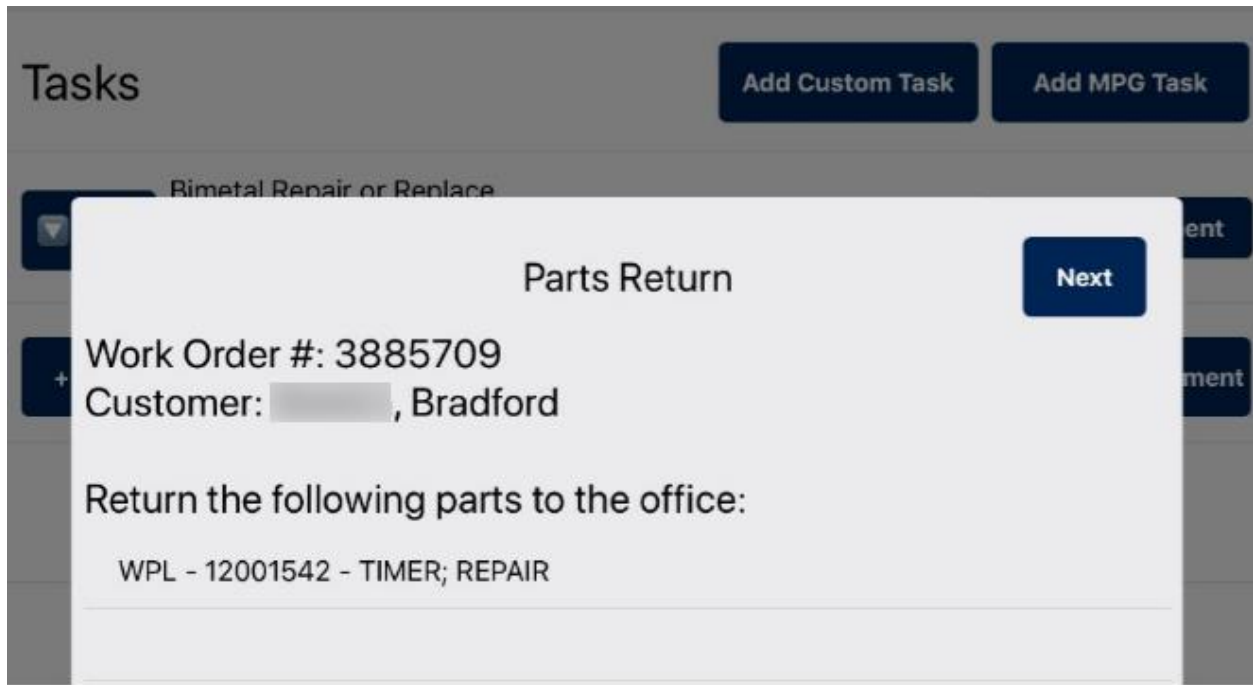
↻

	# In Stock	MFG	MFG #	Part Name	Qty	Total	Stock Part	Status	Rcvd Qty	Vend Inv #	Active
✎ ⬇	1	BSH	00442548	PUMP-CIRCULATING	1	\$0.00	<input type="checkbox"/>	Cancelled	0		<input checked="" type="checkbox"/>
✎ ⬇ Tag part for return to office	1	WPL	12001527	ROLLER W/SHAFT	1	\$15.00	<input type="checkbox"/>	Received	1	6579	<input checked="" type="checkbox"/>
✎ ⬇ ✕	1	WPL	12001542	TIMER; REPAIR	1	\$225.00	<input type="checkbox"/>	Received	1	145699	<input checked="" type="checkbox"/>

1 - 3 displayed , 3 in total

INITIAL RETURN MESSAGE

If a part is “Tagged” by the office, when the tech goes Active on a job, a Return screen will open, showing the part that the office has tagged, reminding the tech that the old part needs to come back.



INSTALLED SCREEN

After the Tech has taken a payment and selected a status (Completed, Promised or Office Schedule), an Installed screen opens.

This screen shows parts that:

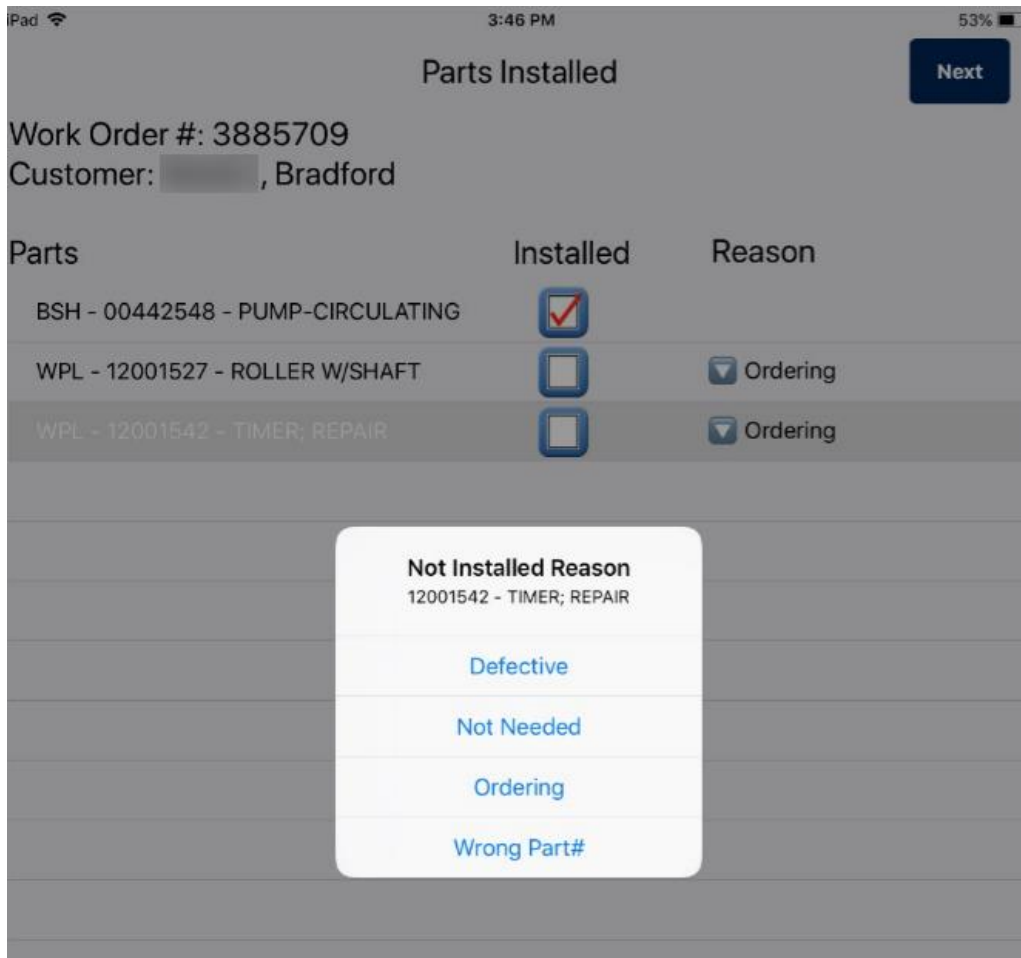
1. Are “Tagged” by the Office
2. Are on the Work Order
3. Are on a PO associated with the Work Order

Core parts show in red.

The Tech is required to either check a box to show that the part was installed OR select a reason that the part was not installed. The reasons that a part is not installed are:

1. Ordering
2. Defective
3. Not Needed
4. Wrong Part #

Once all parts have been categorized, the tech pushes the 'Next' button. If there are parts that need to be returned, the Final Return message opens. If no parts need to be returned, the iPad goes backed to the Scheduled Jobs list.



FINAL RETURN MESSAGE

The Final Return Message only opens if parts need to be returned to the office. The Final Return Message shows parts that:

















1. Are a Core part and marked as Installed.
2. Are not installed and have any reason selected other than 'Ordering' (Defective, Not Needed, Wrong Part#)
3. Have been "tagged" by the office on the PO.


RETURN LIST – COMING SOON!

The Return List will be implemented in March. All of the parts that are on the Return messages for each job will show in the Return List located in the Tech Info button.

CORE & RETURN MODULE

- All parts that are on the Return Messages (Core parts, tagged parts and parts with Not Installed reason of Defective, Wrong Part#, Not Needed) show in the Tech Returns Needed section of the Return & Core module.
- Clicking the green checkmark in the Done column:
 - Moves the part to the “Return to Distributor” section.
 - Removes the part from the Tech’s inventory location and places it in the Return location selected in Franchise Setup. If no Return Location is selected, the part will stay in the Tech’s inventory location.
 - Logs the name of the employee who clicks the button and the date it was clicked.
- Clicking the red ‘X’ removes the part from the return screen without moving it through the return process.



Technician Returns Needed																
Options	MFG #	Part Name	MFG	Tech	PO Date	Vendor	Dist Inv #	Completed Date	Ticket #	Customer	Cost	Core	Return	RMA #	Done	Remove
 	WR57X10098	VALVE DUAL WATER	GEH	Cody	1/22/19	Marcone	79852934		3986895	Mark	\$31.60		Wrong Part#			
	W10480186	CCUASM VMW HY120V WTW485	WPL	Kyle				1/23/19	3987259	Baker,	\$215.14	\$60.00	Installed			
	W10435302	BEARING	WPL	David				1/23/19	3985953	Craig	\$66.79		Not Needed			
	ADL73741401	EVAPORATOR ASSEMBLY	L-G	David				1/24/19	3989755	Anthony	\$102.50		Not Needed			
	ADH73150208	DRIER ASSEMBLY	L-G	David				1/24/19	3989755	Anthony	\$39.37		Not Needed			

Search  1 - 5 displayed , 5 in total

Total Cost: \$455.40 Total Core: \$60.00

- Clicking the green button in the ‘Return to Distributor’ section means that the part has been shipped back to the Distributor. At this point, the part is completely removed from your inventory and moved into the next section, “Receive Reimbursement.”



- An RMA# field has been added to the PO and will show in this section.

Return to Distributor																		
Options	MFG #	Part Name	MFG	Tech	PO Date	Vendor	Dist Inv #	Completed Date	Ticket #	Customer	Cost	Core	Return	RMA #	Done	Remove	Username	Date Received from Tech
 	00188978	NUT	BSH	Rey	11/28/18	Marcone	test1	11/28/18	3885731	Allan, Tera	\$8.80		Not Needed	RMA11597	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Baker, Rebecca	11/30/18

Search 1 - 1 displayed , 1 in total

Total Cost: \$8.80 Total Core: \$0.00

- After the reimbursement is received, either by check, credit or receipt of new part, clicking the green button on the Receive Reimbursement screen removes the part from the Core & Return module.

Receive Reimbursement																		
Options	MFG #	Part Name	MFG	Tech	PO Date	Vendor	Dist Inv #	Completed Date	Ticket #	Customer	Cost	Core	Return	RMA #	Done	Remove	Username	Date Returned to MFG
 	00188978	NUT	BSH	Rey	11/28/18	Marcone	test1	11/28/18	3885731	Allan, Tera	\$8.80		Not Needed	RMA11597	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Baker, Rebecca	11/30/18

Search 1 - 1 displayed , 1 in total

CORE & RETURNS ON THE WORK ORDER

The work order has a new option to show parts that need to be returned. When reviewing a work order, if there are parts that need to be returned, a yellow message shows at the bottom of the screen stating parts need to be returned. At the same time the Core & Return section opens to show which parts are needed. The job will remain "Reviewed", these are just for notification purposes.

Options Print Save Discard

- Attachments
- Communication Notes
- Copy
- Customer
- Inventory Transfer
- Job History - Bill To
- Job History - Customer
- Notes
- Notifications
- Payments
- Purchase Orders
- Returns & Cores**
- Split Pay

3885749

1

Customer Call

12/06/2018

No current start time

Standard

Dominguez, Dan



Returns & Cores

MFG #	Part Name	MFG	PO Date	Vendor	Cost	Core	Return
W10757851	CNTRL-ELEC	WPL		Marcone	\$109.29	\$60.00	Installed

Search

1 - 1 displayed, 1 in total

Total Cost: \$109.29 Total Core: \$60.00

 There are parts for this work order that haven't been returned by the technician. 

Work Order

Options Print Save Discard

Name: Evans, Stewart Ticket #: 3885749

Address: 78006 - Primary - 61 Swedi Zone: 1

Third Party Billing: Job Source: Customer Call

Work Authorization: Job Date: 11/30/2018

Work PO Number: Job Time: 02:06 pm - 03:06 pm

Phone: (720) 215-5368 - Main Time Slot: Standard

Email Address: Schedule Confirmed:

Job Status: Reviewed Tech Completed: 11/30/2018

Dispatch Code: Basic-Basic Service Repair Forced Tech: Dominguez, Dan

Skill Level: Standard Techs: Dominguez, Dan

Accounting Class Code: Make Primary

Job Length: 60 Split Pay Type: All to Primary Tech

Lead Source: Existing Customer Add Tax Authority:

Sec Source: Name Active Exempt

Specialty Scale: San Antonio, TX 8.250%

Claim Submitted:

Warranty:

ID:3885749 Created:2018-11-30 Updated:2018-11-30


Returns & Cores

MFG #	Part Name	MFG	PO Date	Vendor	Cost	Core	Return
W10757851	CNTRL-ELEC	WPL		Marcone	\$109.29	\$60.00	Installed

Search

1 - 1 displayed, 1 in total

Total Cost: \$109.29 Total Core: \$60.00

 There are parts for this work order that haven't been returned by the technician. 