



Infor LN Service User Guide for Owner VS User of Serialized Item

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About this document

This guide provides information about the various concepts and processes such as defining owner vs user for serialized item, defining business partners for orders, available for the Owner vs User of Serialized Item functionality.

Objectives

This document is designed to meet the objectives described below. It is assumed that you already have a understanding of Infor LN Service

- **Understand the following concept**
Service Orders, Work Orders
- Serialized Items
- **To perform the following tasks**
Define the owner vs user of the serialized item
- Defaulting business partner for orders.

Document summary

This guide explains the concept of Owner VS User of serialized items.

How to read this document

This document is assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

For details, refer to Infor LN Service Online Help.

Please refer to the Table of Contents to locate the referred section.

Underlined terms indicate a link to a glossary definition. If you view this document online and you click on underlined text, you jump to the glossary definition at the end of this document.

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This chapter provides you the introduction to the owner, the user, and the dealer of the serialized item.

Owner vs User

When you execute the service activities for calls, service order, maintenance sales order and customer claims, the invoice is received by the owner (the sold-to business partner) of the serialized item. However, It must be possible to invoice one of these parties involved in the service activities such as the owner, the user, and the dealer instead of invoicing the owner of the serialized item.

Configuration Management

■ Installation Groups and Serialized Items

To implement this functionality, the following fields are added to the Installation Groups (tsbsc1100m000) session and the Serialized Items (tscfg2100m000) session:

- Owner
- Dealer
- In Use-by
- Supplier

The **Default Business Partner for Order** field is added to define the business partner role used as the default Sold-to BP for the order, at the time of generating the call, customer claim, service or maintenance sales order.

The business partners specified in the Installation Groups (tsbsc1100m000) or Serialized Items (tscfg2100m000) can only be used as the sold-to business partner for an order if the Sold-to role is defined for the business partner.

The role, **Owner** and **Dealer** are of type Sold-to BP. The role, **In Use-by** is of type **Business Partner** and the **Supplier** role is of type Buy-from **Business Partner**. If the value of the **Default Business Partner for Order** is set to **In Use-by** or **Supplier**, Infor LN checks whether the related business partners have the sold-to role defined.

- **Synchronizing BP roles in Physical Breakdown Structures**

The owner of all the serialized items in a PBS and the owner linked to an installation group, is the same, and if the **Owner** is changed, all the serialized items in the PBS are also updated. The **Owner** can only be changed at the highest level, of the PBS.

The **In Use-by** related fields are updated to all serialized items on a lower level in the PBS. You can modify the **In Use-by** at all the levels in the PBS.

The **In Use-by**, **Dealer** and **Supplier** related fields have to be synchronized manually. When you manually change the **Dealer**, **Supplier** and **In Use-by** related fields, Infor LN prompts you to confirm that the serialized item lower in the structure must be updated with these values.

If the **Owner** is not specified, all the **Owner** and **In Use-by** related fields in the PBS, are cleared.

- **Service Order Parameter 'Ship Materials To'**

The material required to perform the service order activity is normally shipped to the ship-to address of the ship-to BP or to the location address of the order/activity (The location address is defaulted from the Installation Group or Serialized Item).

The service order material is shipped to the ship-to address of the order or to the location address of the order/activity based on the value specified in the **Ship Materials To** field in the Service Order Parameters (tssoc0100m000) session.

The sold-to BP specified for the order can be different from the Owner (sold-to BP) specified on the Installation Group or Serialized Item. So, it must be possible to ship the material by default, to one of the addresses linked to the roles defined for the Installation Group or the Serialized Item.

The **Ship Materials To** domain is extended with the following values:

- **Ship-to BP Address**
- **Location Address**
- **Owner Address**
- **In-Use-by BP Address**
- **Dealer Address**

- **Handling of customer owned items**

When an installation that is not owned by the Sold-to BP of that installation is serviced, you are allowed to use the sold-to business partner or installation owner for the warehouse receipt or issue if the following check boxes are selected in the SO, MSO or WO parameter sessions:

- **Allow to use Installation Owner instead of Sold-to BP on issue**
- **Allow to use Sold-to BP instead of Installation Owner on receipt**

- **Receipt of customer owned serialized items**

During the receipt of a customer owned serialized item, the owner of the serialized item is updated.

If the item is received as company owned, the Owner field is cleared. If the item is received as customer owned, the Owner of the item in the inventory can be different from the Owner of the serialized item.

A new parameter **Allow Installation Owner to be different from Inventory Owner** is added to the SO, MSO or WO parameter sessions. If this check box is selected, Owner of the serialized item and the Owner in inventory are same.

This chapter explains how to default business partner for orders.

Default Business Partner for Order

Calls

When a call is registered in the Call (tsclm1100m000) session, the **Sold-to B.P.** is defaulted from the Installation Groups (tsbsc1100m000) session or the Serialized Items (tscfg2100m000) session. The **Default Business Partner for Order** field in the Installation Groups (tsbsc1100m000) session or the Serialized Items (tscfg2100m000) session, indicates the business partner roles that is used as the **Sold-to B.P.** for the call.

If the **In Use-by Business Partner** is used as default business partner, the value in the **In Use-by Business Partner Contact** field must be verified to determine if this value can be used as the default for the **Location Contact** (Sold-to Contact) field.

If the installation group or the serialized item specified for the call are not owned by the **Sold-to B.P.** of the call, the user is notified.

Infor LN does not notify the user, if the **Sold-to B.P.** is not the owner of the serialized item or installation group, but is defined as one of the business partner roles.

Service Orders

When a service order is created in the Service Orders (tssoc2100m000) session, the **Sold-to Business Partner** is defaulted from the installation group or the serialized item. The **Default Business Partner for Order** field in the Installation Groups (tsbsc1100m000) or the Serialized Items (tscfg2100m000) session indicates the business partner role that is used as the **Sold-to Business Partner** for the service order.

Infor LN notifies the user, if an installation group or serialized item is used on the service order which is not owned by the **Sold-to Business Partner** of the service order. If the **Sold-to Business Partner** is defaulted from the serialized item or installation group, notification is not appeared.

Infor LN does not notify the user (non blocking notification), if the **Sold-to Business Partner** is not the owner of the serialized item or installation group, but is present as one of the defined roles.

Generate Service Order

The service orders can be generated from various sources. The **Sold-to Business Partner** must be retrieved and defaulted from the source, based on the **Sold-to Business Partner/owner** default mechanism, for the serialized item and the installation group.

- Projects (TP): Defaulted from Installation Group or Project
- Planned Activities: Defaulted from Serialized Item
- Call: Retrieved from Call
- Field Change Orders: Retrieved from Field Change Order or Serialized Item
- Inspections: Retrieved from Serialized Item
- Tooling: Defaulted from Serialized Item
- Quotations: Retrieved from Quotation
- Serialized Item: Defaulted from Serialized Item
- Remote Engineer: Retrieved from remote engineer.

Else, the value in this field must be cleared.

Maintenance Sales Orders

The **Installation Group**, **Item** and the **Serial Number** fields are added to the Maintenance Sales Orders (tsmsc1100m000) session. This fields are used to default the value in the **Service Office**, **Service Type**, and sold -to **Business Partner** fields.

These fields are not used for contract related defaults and are not to be used as default for the Maintenance Sales Part lines.

The **Default Business Partner for Order** field in the Installation Groups (tsbsc1100m000) or the Serialized Items (tscfg2100m000) session indicates that which of the business partner roles is used as the sold-to **Business Partner** on the MSO.

Infor LN notifies the user (non blocking notification), if an installation group or serialized item is used on the MSO which is not owned by the **Sold-to B.P.** of the MSO. If the sold -to **Business Partner** is defaulted from the serialized item or installation group, notification is not appeared.

Infor LN does not notify the user (non blocking notification), if the sold -to **Business Partner** is not the owner of the serialized item or installation group, but is present as one of the defined roles.

Generate Maintenance Sales Order

When a maintenance sales order is generated from a call or from a planned activity, the **Installation Group**, **Item** and the **Serial Number** fields are defaulted (and must not be modified), except when the planned activities of the order are grouped together by department and/or time.

When a new order is created from the Serialized Item (tscfg2600m000) session, the **Installation Group**, **Item** and the **Serial Number** fields are defaulted from the Serialized Item (tscfg2600m000) session.

Customer Claims

When a customer claim is created, the **Sold-to B.P.** is defaulted based on the **Installation Group** or the serialized **Item**. The **Default Business Partner for Order** field in the Installation Groups (tsbsc1100m000) session or the Serialized Items (tscfg2100m000) session indicates that which of the business partner roles is used as **Sold-to Business Partner** on the claim.

Infor LN notifies the user (non blocking notification), if an installation group or serialized item is used on the MSO which is not owned by the **Sold-to B.P.** of the MSO. If the sold -to **Business Partner** is defaulted from the serialized item or installation group, notification is not appeared.

Infor LN does not notify the user (non blocking notification), if the sold -to **Business Partner** is not the owner of the serialized item or installation group, but is present as one of the defined roles.

This new functionality is applicable only for items specified on the claim header.

This chapter explain how to manage ownership when maintenance is performed to an installation that is not owned by the Sold-to business partner of the order.

Sold-to BP versus Owner

During the maintenance of an installation, warehouse orders are created to retrieve and send materials from or to the warehouse. If customer owned material is involved and the maintenance is performed to an installation that is not owned by the Sold-to business partner of the order, it must be possible to indicate if the material used is owned by the Sold-to business partner or by the owner of the serialized item.

To implement this functionality, the **Business Partner of Inventory** field is added to the following sessions:

- Service Order Material Costs (tssoc2122m000)
- Maintenance Sales Order - Part Lines (tsmsc1110m000)
- Work Orders (tswcs2100m000)
- Work Order Material Resources (tswcs4110m000)
- Work Order Outgoing Subassemblies (tswcs4150m000)
- Work Order Incoming Subassemblies (tswcs4151m000)
- Work Order Incoming Subassembly History (tswcs8551m000)

This field can be only set to:

- Sold-to-Business Partner
- Owner

This field is a display field and is applicable only if the **Ownership** field is set to **Customer Owned**.

Issue of customer owned materials

At the time of maintaining an installation, that is not owned by the Sold-to BP, if the **Allow to use Installation Owner instead of Sold-to BP on issue** check box is selected in the Maintenance Sales

Order, Work Orders and Service Orders sessions, the customer owned material which is available with the actual owner of the installation, can be used.

If this parameter is selected and maintenance is performed for an installation that is not owned by the Sold-to BP; the user is allowed to set the **Business Partner of Inventory** field to Owner instead of the Sold-to BP. This is also applicable for material lines that contain both serialized and anonymous items.

If this parameter is not selected, only customer owned materials owned by the Sold-to BP are allowed for the installations. This also applies for serialized and anonymous items.

- **Receipt of customer owned materials**

At the time of maintaining an installation that is not owned by the Sold-to BP, if the **Allow to use Sold-to BP instead of Installation Owner on receipt** check box is selected in the Maintenance Sales Order, Work Orders and Service Orders sessions, the Sold-to BP can be used as the owner in the inventory.

The item must be received in warehouse as customer owned.

If this parameter is selected and maintenance is performed for an installation that is not owned by the Sold-to BP; the user is allowed to set the **Business Partner of Inventory** field to Sold-to BP instead of the Owner. This is also applicable for material lines that contain both serialized and anonymous items.

If the new parameter is not selected, only customer owned material owned by the owner of the serialized item is allowed. This is also applicable for the serialized and anonymous items.

- **Physical Breakdown related changes**

All items in the physical breakdown are owned by the same business partner.

The breakdown changes can be initiated through maintenance sales order, work orders and service orders. The PBS is updated when these orders are processed. When updating the owner of serialized items that are used in a PBS, the owner of the top item of the PBS is also updated.

If the owner of the serialized item and the sold-to BP are not the same; the owner of the PBS must be updated.

If a serialized item or an anonymous item is removed from a PBS and sent to warehouse as customer owned, the PBS owner or the Sold-to BP of the order can be used for the warehousing transactions. Although the owner in inventory can be modified, the owner of serialized item is always the owner of the PBS.

When an anonymous item, owned by the Sold-to BP, is issued as customer owned, from the warehouse and linked to a PBS, the item is owned by the owner of the PBS, thereafter.

- **Parent Item Details**

If for a material line, the parent **Item**, **Serial** and the **Position** (Parent Item details) are specified, the line can initiate the PBS update. With the help of the parent item and serial number, the owner can be determined. If the parent item details are not available, the PBS is not updated and the sold-to BP must be used as the owner of the serialized item.

The parent item, parent serial and the position ('Parent Item details') are populated on the service order material cost lines, maintenance sales part maintenance, delivery and receipt lines and on the work order material resources. You can also define the sold-to BP of the order as one of the business partner roles, for the serialized item.

To notify the user that a change is initiated for a PBS that is not owned by the sold-to BP of the order, a message is displayed, when the parent item details are specified.

Chapter 4

Business Partner Defaulting

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This chapter provides you a brief description of the impact of the business partner defaulting with respect to owner VS user of serialized item.

Impact of Business Partner Defaulting

Ship-to addresses for Service Orders and Activity

The **Ship-to Business Partner**, **Ship-to Address** and the **Ship-to Contact** fields are added to the service order activity as these fields may have different values for each activity.

The field **Ship Materials To** is added to the Service Orders (tssoc2100m000) and Service Order Activities (tssoc2110m000) sessions.

On the basis of the value specified in these fields, the **Shipping Address** is determined in the Service Order Material Costs (tssoc2122m000) lines session. The service order header fields are used for the material cost lines which are directly related to the service order (with activity line number zero). The service order activity fields are used for material cost lines related to an activity.

Header Line synchronization

The **Ship-to Business Partner**, **Ship-to Address**, **Ship-to Contact** and **Ship Materials To** fields are added to the Service Order - Lines - Synchronization (tssoc0280m000) session.

When the value of **Ship-to Address** is changed on the service order activity line, the **Shipping Address** of the related Service Order Material Costs (tssoc2122m000) lines must be updated.

Installation Group and Serial on Maintenance Sales Order

The **Installation Group**, **Item** and the **Serial Number** fields are added to the Maintenance Sales Orders (tsmsc1100m000) session. When you specify a value in these fields, the **Service Office**, **Service Type**, and sold -to **Business Partner** fields are populated with the related values.

These fields are not used for contract related defaults and are not to be used as default for the Maintenance Sales Part lines.

The **Default Business Partner for Order** field in the Installation Groups (tsbsc1100m000) or the Serialized Items (tscfg2100m000) session indicates that which of the business partner roles is used as the sold-to **Business Partner** for the MSO.

- **Header Line synchronization**
The **Item**, **Serial Number** and the **Installation Group** fields are added to the Maintenance Sales Order - Part Lines (tsmsc1110m000) session and are only used as default for the first added line, hence these fields are not added to the Maintenance Sales Order - Lines - Synchronization (tsmsc0280m000) session.
- **Generate Serial Number**
 - The **Generate** button is used to generate a serial.
 - If a serial number that does not exist is specified, a message appears asking the user to create the serial number.

Selecting / Search Installation Group or Serial during order entry

When selecting a serial number in the part maintenance lines, service order lines and customer claim lines, Infor LN filters and displays only the serialized items that are owned by the Sold-to BP of the order, in the Serialized Items (tscfg2100m000) session.

To select the serialized items that are not owned by the Sold-to BP of the call, service order, maintenance sales order or customer claim, the Search Criteria (Installation Groups) (tsmdm0280m000) and the Search Criteria (Serialized Items) (tsmdm0281m000) sessions are modified. The functionality of these session has been enhanced by adding a domain with value **Owner**, **In Use-by**, **Dealer** and **Supplier**.

The Found Installation Groups (tsmdm0580m000) and the Found Serialized Items (tsmdm0581m000) session is extended with a domain having values **Owner**, **In Use-by**, **Dealer** and **Supplier**. This field can be used to indicate the roles of the installation group or the serialized item for which, the search of the business partner must be executed.

Transfer Planned Activities

Planned activities can be transferred to service order or maintenance sales order using:

- The Transfer Planned Activities to Field Service (tsspc2220m000).
- The Transfer Planned Activities to Depot Repair (tsspc2220m100).

In both situations the orders can be grouped using several options. During processing of planned activities, the new serialized item relation of owner versus to sold-to BP of the order must be considered.