

SERVICE

WORK ORDERS - LOANS

You can request a **loan machine** to be issued and sent out to a client whilst their machine is being repaired.

The **Loan Unit Request** can only be requested against a <u>work order linked to</u> <u>a call</u> and where the work order item, equipment or location, is linked to a contract.

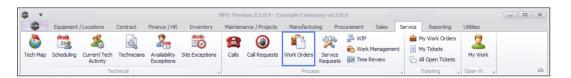
The loan unit <u>must</u> be returned before the call can be **closed**.

Meter readings should be taken <u>before issuing</u> and <u>on collection of</u> the loan unit, to keep track of copies made, whilst the unit is with the client.

Delivery and Collection Notes can be printed to authorise the delivery and collection of the loan unit.

Loan machines must be **Internal Assets**. The system will assist in converting a stock item to an asset, where required.

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 raise a *loan request* against.
- 5. Click on the *Loans* tile.

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		· WO0006239	PR		Rollers need replacing	No		11/11/2021		No	PRJ0000408	
		WO0006240	SM		WS - Weekly Service	No		16/11/2021		No	PRJ0000416	
		WO0006241	SM		WS - Weekly Service	No		16/11/2021		No	PRJ0000413	
Services		WO0006242	SERV		1MMS - 1 Month Machine Service	No		16/11/2021	-	No	PRJ0000413	
		WO0006243	SM		WS - Weekly Service	No		16/11/2021		No	PRJ0000413	
	4	• WO0006245	SM		WS - Weekly Service	No		23/11/2021		No	PRJ0000417	
Third Party Services		· WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2	No	PRJ0000418	1
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Parts		VO0006249	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2	No	PRJ0000419	
		► WO0006250	REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro	14/12/2021	3	No		
			ITS	CN0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin	18/01/2022	3	No		
	٦I	⊞ WO0006252	REP	CN0005300	Printer displaying error code	No	Printer displaying error	18/01/2022	3	No		
Loans			PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3	No		
		WO0006256	IMP	CN0005302	New machine implementation. Installation	. No	New machine implemen	24/01/2022	1	No		
		5 E WO0006257	NDS	CN0005274	PRO3406OR002	No	PROJ406OR002	19/01/2022	2	No		
Swap Outs		WO0006258	SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2	No		
		WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2	Yes		
		· WO0006260	REP	CN0005304	Loan unit required while main unit is being	No	Loan unit required whil	15/03/2022	3	No		

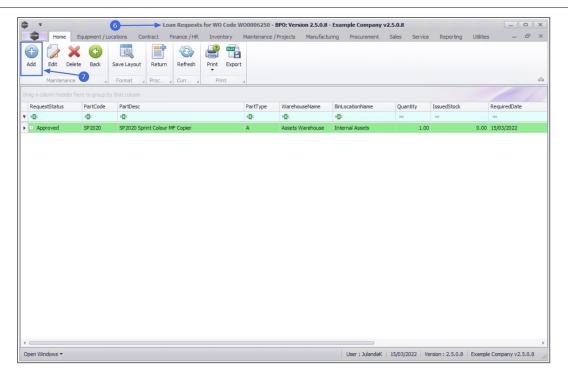
6. The *Loan Requests for WO Code [work order code]* screen will be displayed.

REQUEST LOAN UNIT

7. Click on **Add**.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Add*.





- 8. The *Part Requests* screen will be displayed.
 - BOM or Parts: Click on the Parts radio button.
 - Work Order: The work order number will be auto populated with the work order <u>initially</u> selected.
 - Part: Click on the *search* button to display the *Select a part for this work order* screen.
 - i. Click on the *row* of the *part* you wish to request a *loan unit* for.
 - ii. Click on **OK**.

Note that the loan item selected, should preferably be the same model as the item being repaired, to ensure minimum usage disruption during the loan period.



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- **Part Number:** The part number will be populated with the part number selected.
- **Description:** This field will display the description for the part number selected.
- Quantity: The quantity has been set to 1, as only 1 loan unit can be issued at time.
- Warehouse: The warehouse will auto populate with the *Assets Warehouse* as only Internal Assets can be loaned out.
- Required Date: Click to type in or click on the down arrow to use the calendar function to select the date the unit will be required.
- Assigned To: Click on the down *arrow* to select the person responsible for the loan part request, from the drop-down list.



- **Requested By:** Click on the down *arrow* to select the person requesting the loan part request, from the drop-down list.
- **Comments:** Click to type in any comments required.
- Is Billable: Note that you <u>cannot</u> make this item billable.
- Is Loan: This field is marked as Is Loan and cannot be modified.
- Under Warranty: Click to select the check box, if the loan part request is under warranty.
- 9. When finished adding the details to this screen, click on *Save*.

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open windows *							user : Julandak	15/03/2022	version : 2.5.0.8	Example Co	mpany vz.5.0.8	14

- 10. You will return to the *Loan Requests for WO Code* screen.
- 11. When you receive the *Part Request Processing* message to confirm;
 - The part request for part [part code] has been added successfully to WO: [work order code].
- 12. Click on **OK**.



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	Part Request Processing	1) t SP2020 has been saved successfully 12	x to WO : OK		

13. You can now *view* the part loan request details.

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Issue Loan Unit

If the system is *not* set to <u>auto approve</u> part requests, then the loan unit (part) request has to be <u>approved</u> first, and then <u>issue</u> the approved loar unit (part) request.

EDIT LOAN UNIT

- 1. From the *Loan Requests for WO Code [work order code]* screen,
- 2. Click on the *row* of the Loan Unit Request you wish to edit.
- 3. Click on *Edit*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Edit*.

- 4. When you receive the *Loan Request* message to confirm;
 - Are you sure you want to edit this loan request [PQ number] on WO [work order code]?
- 5. Click on Yes.

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- 6. The *Part Requests* screen will be displayed.
- 7. Make the required changes to the part request screen.
- 8. Click on *Save*.

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DELETE LOAN UNIT

A Loan Unit can only be deleted from the Loan Request for WO screen when the *Request Status* is *Awaiting Approval*.

- 1. From the Loan Requests for WO Code [WO number] screen,
- 2. Click on the *row* of the loan unit request you wish to remove.



3. Click on *Delete*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Delete*.



- 4. When you receive the *Loan Requests* message to confirm;
 - Are you sure you want to remove this loan request
 - [request number] on WO [work order code]?
- 5. Click on Yes.

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Open windows *							user : Julandak	15/03/2022	version : 2.5.0.8	Example Company v2.5.	0.8 //.

6. The *Request Status* for the loan request has changed to *Deleted*.



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RETURN LOAN UNIT

- 1. From the Loan Requests for WO Code [work order code]screen,
- 2. Click on the *row* of the loan unit to be returned.

Note that the expand button will be *feint*, as in this image, if the loan return request has not been done yet.

3. Click on *Return*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Return*.

- 4. When you receive the *Loan Return Process* message to confirm;
 - Are you sure you want to create a loan return for this equipment?
- 5. Click on Yes.

Refer to <u>Request Loan Unit Return</u> for a detailed handling off this process.



Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities —
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Open Windows User : Julandai (15/03/2022 Version : 2.5.0.8 Example Company v2.5.0.

- 6. Next you will receive the *Process Validation* message to confirm;
 - Are you sure you want to create a return request for the loan unit, serial no. [serial number]?
- 7. Click on Yes.

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8. Note that the expand button is visible indicating that the return request has been done.

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VIEW LOAN UNIT RETURN REQUEST

- In the Loan Requests for WO Code screen, click on the expand icon in the row of the selected loan request.
- 10. The *Return* frame will be expand.
- 11. Here you can view the loan return *details*.



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PRINT LOAN UNIT DELIVERY NOTE

The Loan Unit Delivery Note can only be printed <u>after</u> the loan stock has been *Approved* and *Issued*.

- 1. From the *Loan Requests for WO Code [work order code]* screen,
- 2. Click on the *row* of the loan request you wish to print a delivery note for.
- 3. Click on the down *arrow* on *Print* to display the drop-down list.
- 4. Click on *Delivery Note*.



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Approved	2020-998	Staple Unit		A	Assets Warehouse	Internal Assets	1.00		1.00 15/03/2022	
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- 5. The Loan Unit Delivery Note will display in the *Report Preview* screen.
- From this screen you can make cosmetic changes to the document, as well as *View*, *Print*, *Export* or *Email* the Loan Unit Delivery Note.
- 7. *Close* the Report Preview screen when done.



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	Reference:	PQ00005556	Additional Ref. :	WO0006260				
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	Contract No.:	CO000006	Serial No. :	1912-102035				
	Employee Name Contact :	Angle Smith	Shipping Address :	674 Nightwish A				
	Contact : Customer :	Office Supplies Unlimited	Shipping Address :	674 Nightwish A Forest Hills	ve			
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PRINT LOAN UNIT RETURN NOTE

This *Loan Unit Return document* will be taken to the client on <u>delivery</u> of the *repaired machine* and simultaneous <u>collection</u> of the *loan unit*. As the unit is collected, the <u>meter</u> readings is updated before the document is signed off and the unit is returned to store.

- 1. From the Loan Requests for WO Code [work order code] screen,
- 2. Click on the *row* of the loan request you wish to print a delivery note for.
- 3. Click on the *arrow* on *Print* to display the drop-down list.
- 4. Click on *Loan Return*.



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- 5. The Loan Unit Return will display in the *Report Preview* screen.
- 6. From this screen you can make cosmetic changes to the document, as well as *View*, *Print*, *Export* or *Email* the Loan Unit Delivery Note.
- 7. *Close* the report preview screen when you are done.



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#### **Related Topics**

- Issue Loan Unit
- Request Loan Unit Return
- Return Loan Unit to Store
- Update Meter Reading

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