

# SERVICE

## CALLS – LOAN UNITS

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** will be raised against the **Repair Call**.

The loan unit must be **returned** before the call can be **closed**.

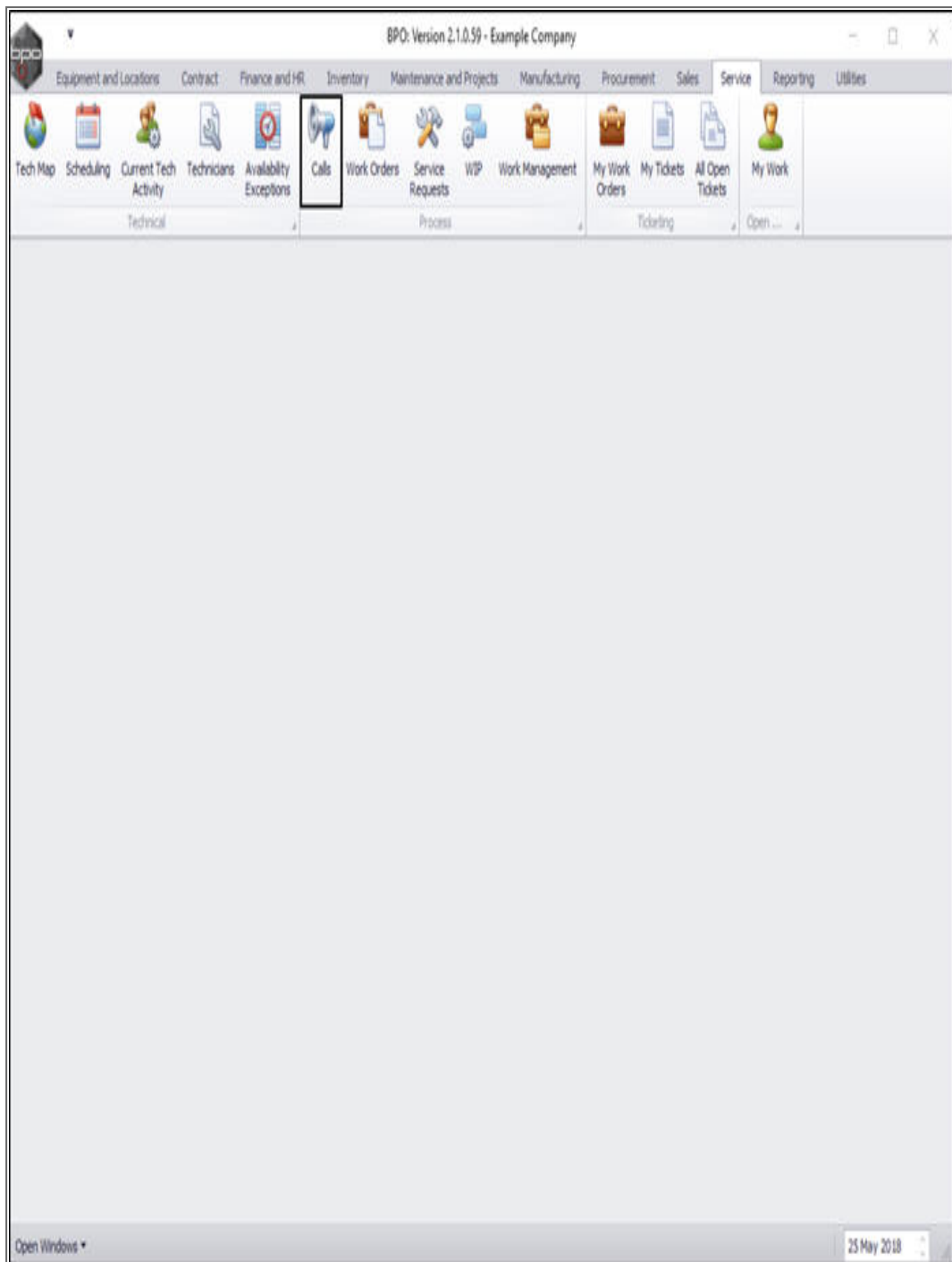
**Delivery** and **Collection** Notes can be printed to authorise the delivery and collection of the loan unit.

Loan machines must be **Internal Assets** (you can convert a stock item to an asset in BPO, if required).

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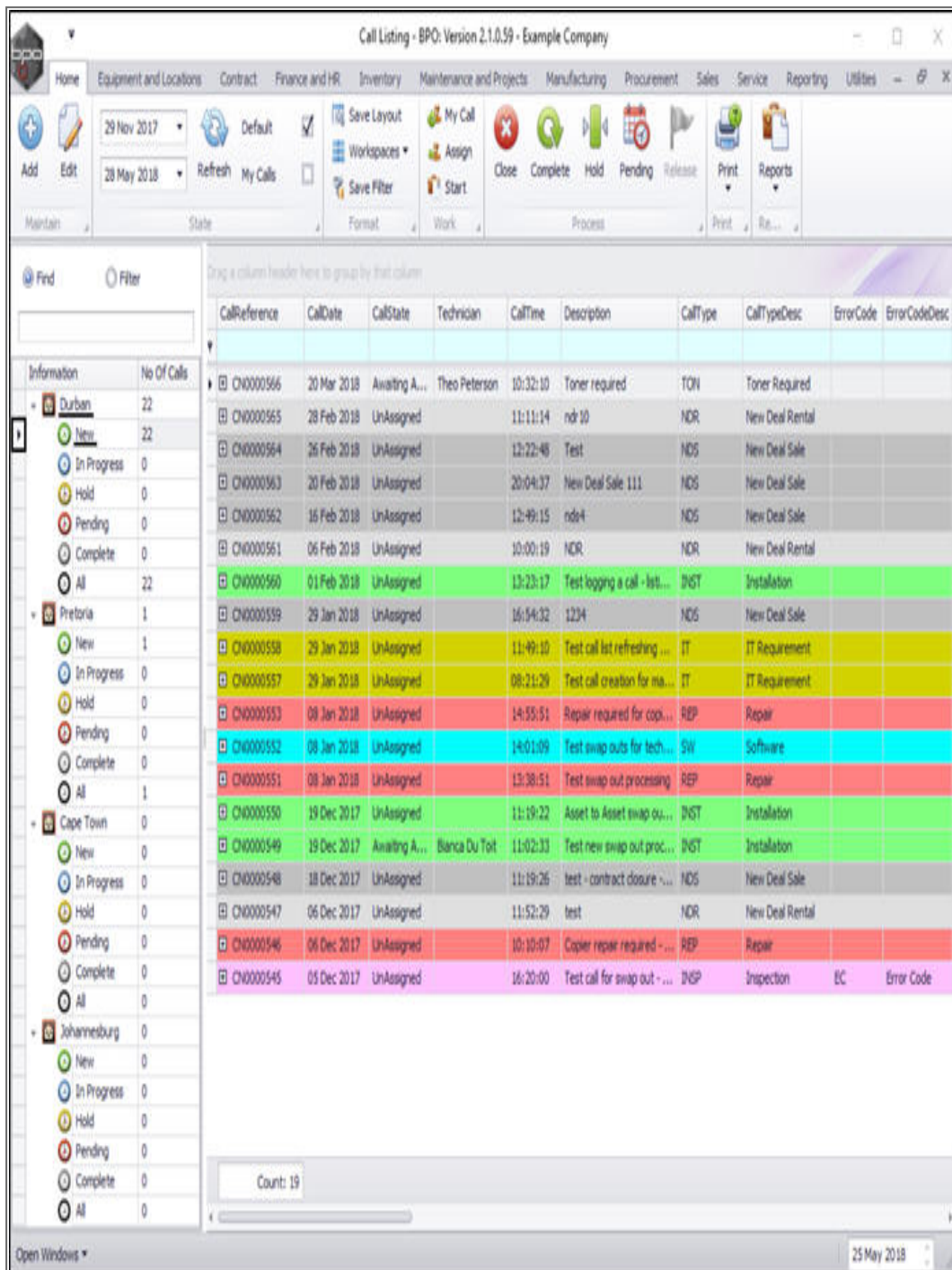
**Ribbon Access:** *Service > Calls*

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

- Select the **site** and **status**.
  - In this image, the **Durban** site and the **New** status have been selected.



Call Listing - BPO: Version 2.1.0.59 - Example Company

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

29 Nov 2017 28 May 2018 Default Refresh My Calls Save Layout Workspaces Save Filter My Call Assign Close Complete Hold Pending Release Print Reports

Find Filter

Drag a column header here to group by that column

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc
CH0000566	20 Mar 2018	Awaiting A...	Theo Peterson	10:32:10	Toner required	TON	Toner Required		
CH0000565	28 Feb 2018	UnAssigned		11:11:14	ndr 10	NDR	New Deal Rental		
CH0000564	26 Feb 2018	UnAssigned		12:22:48	Test	NDS	New Deal Sale		
CH0000563	20 Feb 2018	UnAssigned		20:04:37	New Deal Sale 111	NDS	New Deal Sale		
CH0000562	16 Feb 2018	UnAssigned		12:49:15	ndr4	NDS	New Deal Sale		
CH0000561	06 Feb 2018	UnAssigned		10:00:19	NDR	NDR	New Deal Rental		
CH0000560	01 Feb 2018	UnAssigned		13:23:17	Test logging a call - list...	INST	Installation		
CH0000559	29 Jan 2018	UnAssigned		16:54:32	1234	NDS	New Deal Sale		
CH0000558	29 Jan 2018	UnAssigned		11:49:10	Test call list refreshing ...	IT	IT Requirement		
CH0000557	29 Jan 2018	UnAssigned		08:21:29	Test call creation for ma...	IT	IT Requirement		
CH0000553	08 Jan 2018	UnAssigned		14:55:51	Repair required for cop...	REP	Repair		
CH0000552	08 Jan 2018	UnAssigned		14:01:09	Test swap outs for tech...	SW	Software		
CH0000551	08 Jan 2018	UnAssigned		13:38:51	Test swap out processing	REP	Repair		
CH0000550	19 Dec 2017	UnAssigned		11:19:22	Asset to Asset swap ou...	INST	Installation		
CH0000549	19 Dec 2017	Awaiting A...	Bianca Du Toit	11:02:33	Test new swap out proc...	INST	Installation		
CH0000548	18 Dec 2017	UnAssigned		11:19:26	test - contract closure ...	NDS	New Deal Sale		
CH0000547	06 Dec 2017	UnAssigned		11:52:29	test	NDR	New Deal Rental		
CH0000546	06 Dec 2017	UnAssigned		10:10:07	Copier repair required - ...	REP	Repair		
CH0000545	05 Dec 2017	UnAssigned		16:20:00	Test call for swap out - ...	INSP	Inspection	EC	Error Code

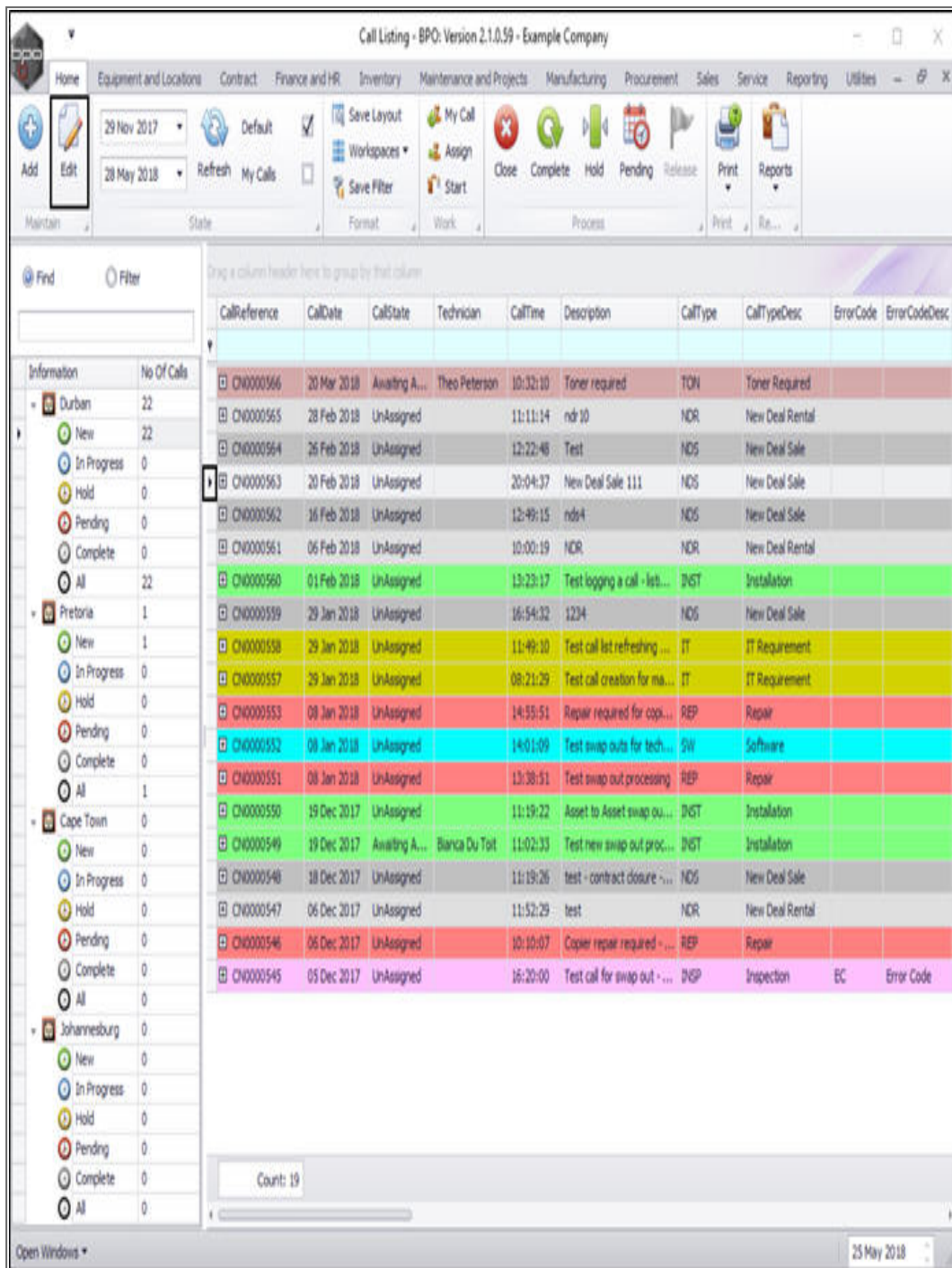
Count: 19

Open Windows 25 May 2018

## REQUEST LOAN UNIT ISSUE

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- Click on the *row selector* in front of the *call* that you wish to *issue the loan unit request* against.
- Click on *Edit*.



CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc
CH0000566	20 Mar 2018	Awaiting A...	Theo Peterson	10:32:10	Toner required	TON	Toner Required		
CH0000565	28 Feb 2018	UnAssigned		11:11:14	ndr 10	NDR	New Deal Rental		
CH0000564	26 Feb 2018	UnAssigned		12:22:48	Test	NDS	New Deal Sale		
CH0000563	20 Feb 2018	UnAssigned		20:04:37	New Deal Sale 111	NDS	New Deal Sale		
CH0000562	16 Feb 2018	UnAssigned		12:49:15	ndr4	NDS	New Deal Sale		
CH0000561	06 Feb 2018	UnAssigned		10:00:19	NDR	NDR	New Deal Rental		
CH0000560	01 Feb 2018	UnAssigned		13:23:17	Test logging a call - list...	INST	Installation		
CH0000559	29 Jan 2018	UnAssigned		16:54:32	1234	NDS	New Deal Sale		
CH0000558	29 Jan 2018	UnAssigned		11:49:10	Test call list refreshing ...	IT	IT Requirement		
CH0000557	29 Jan 2018	UnAssigned		08:21:29	Test call creation for ma...	IT	IT Requirement		
CH0000553	08 Jan 2018	UnAssigned		14:55:51	Repair required for cop...	REP	Repair		
CH0000552	08 Jan 2018	UnAssigned		14:01:09	Test swap out for tech...	SW	Software		
CH0000551	08 Jan 2018	UnAssigned		13:38:51	Test swap out processing	REP	Repair		
CH0000550	19 Dec 2017	UnAssigned		11:19:22	Asset to Asset swap ou...	INST	Installation		
CH0000549	19 Dec 2017	Awaiting A...	Bianca Du Toit	11:02:33	Test new swap out proc...	INST	Installation		
CH0000548	18 Dec 2017	UnAssigned		11:19:26	test - contract closure ...	NDS	New Deal Sale		
CH0000547	06 Dec 2017	UnAssigned		11:52:29	test	NDR	New Deal Rental		
CH0000546	06 Dec 2017	UnAssigned		10:10:07	Copier repair required - ...	REP	Repair		
CH0000545	05 Dec 2017	UnAssigned		16:20:00	Test call for swap out - ...	INSP	Inspection	EC	Error Code

The **Call maintenance: Call ref. - [ ]** screen will be displayed.

- Click on the **Work Orders** tile.

Call maintenance : Call ref. - CN0000563 - BPO: Version 2.1.0.59 - Example Company

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

Save Back Close Complete Assign Hold Pending Release Reinstate Save Layout Workspaces Print Note

Maintain Process Format Print Info

Links

Functions

Work Orders 2

Work In Progress

Notes

Assignments

Hold History

Pending History

On Site Info 1

For Contract

Customer Hope Works

Contact Julia Ribson

Contact No. 031 768 9876

Address Plot 91 Leaf Road  
Forest Hills  
New Town  
Durban South

Call Type New Deal Sale

Error Code

Description New Deal Sale 111

Call Date Time 20 Feb 2018 20:04:37

Priority 2

SLA 0.00

Date Required 27 Feb 2018

Order No OR0000237

Logged By AbigailM

Status N - New

Optional No

Relates To :

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	OR0000237

Closure Details :

Action

Closure Date Time 00:00:00

Closed By

Meters

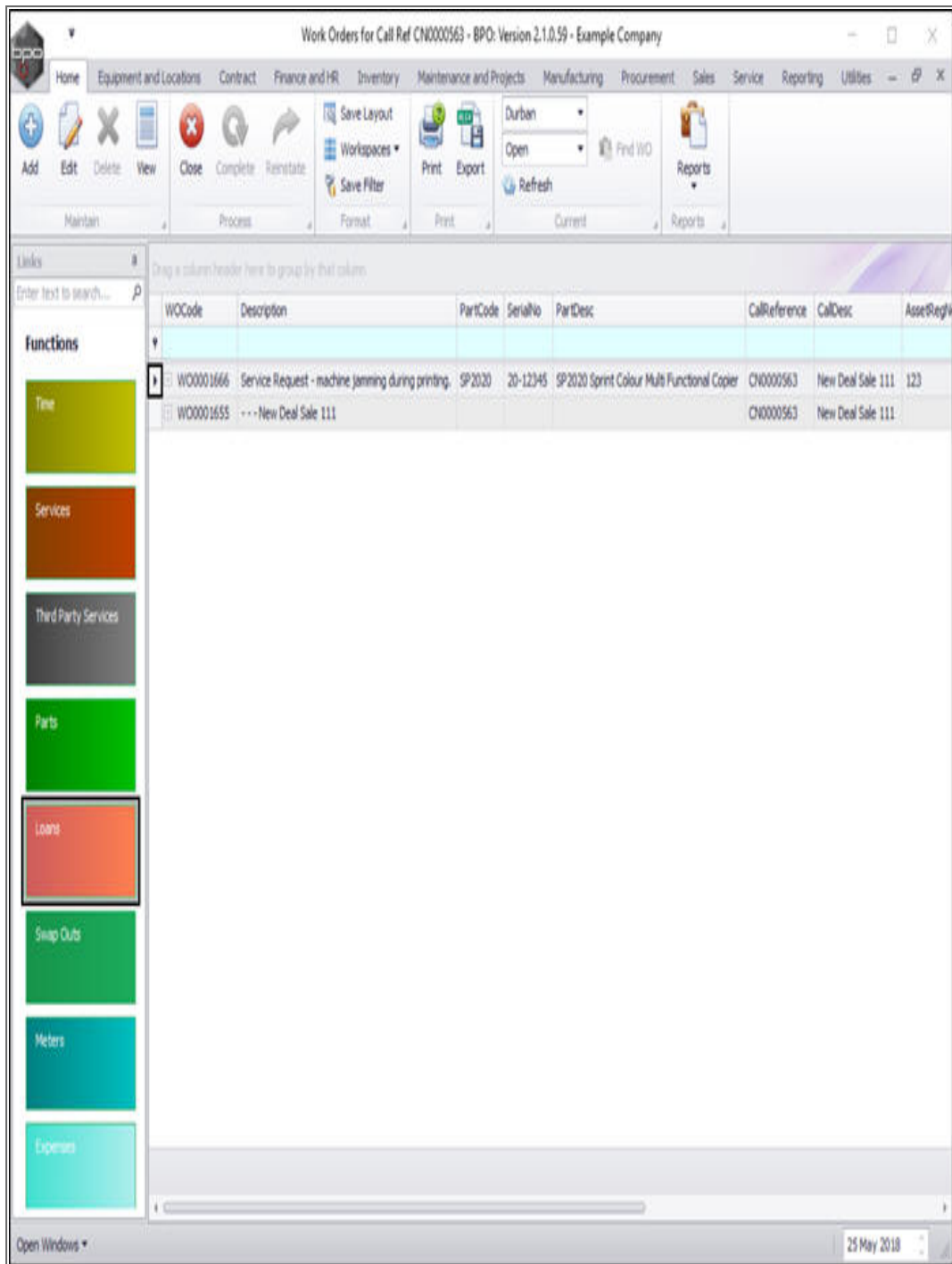
Open Windows

25 May 2018

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

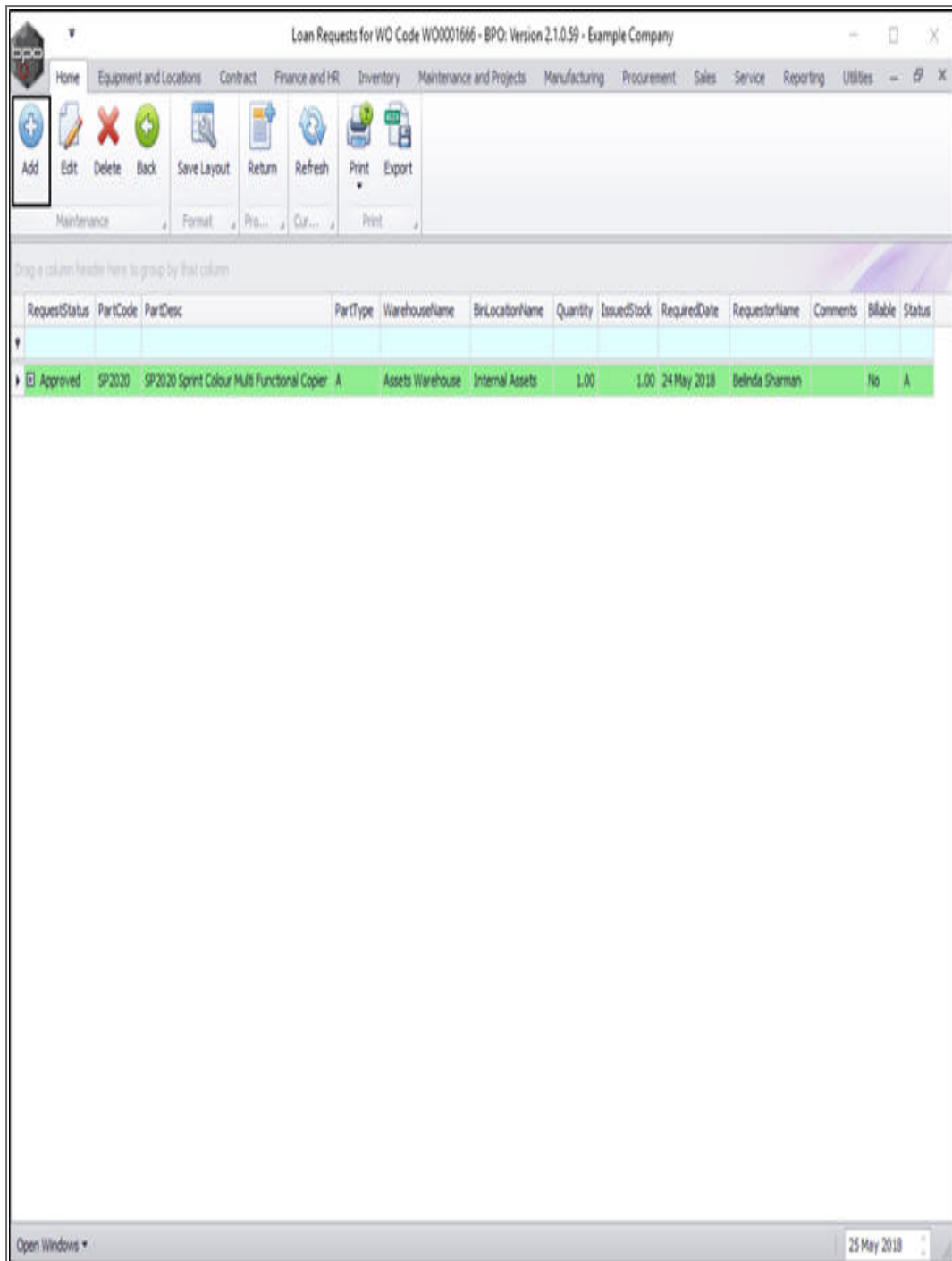
- Click on the **row selector** in front of the **work order** that you wish to **link** a loan unit to.

- Click on the **Loans** tile.



The **Loan Requests for WO Code [ ]** listing screen will be displayed.

- Click on **Add**.



Loan Requests for WO Code W00001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Pro... Cur... Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A

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The **Part Requests** screen will be displayed.

- **BOM or Parts:** Select the **Parts** radio button.
- **Work Order:** This field will be auto populated by the work order number initially selected in the previous steps of this process.

Part Requests - BPO: Version 2.1.0.59 - Example Company

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

Save Back Process

**BOM** **Parts**

Work Order W00001666

Part

Description

Quantity

Warehouse

Required Date 28 May 2018

Assigned To Abigail Mine

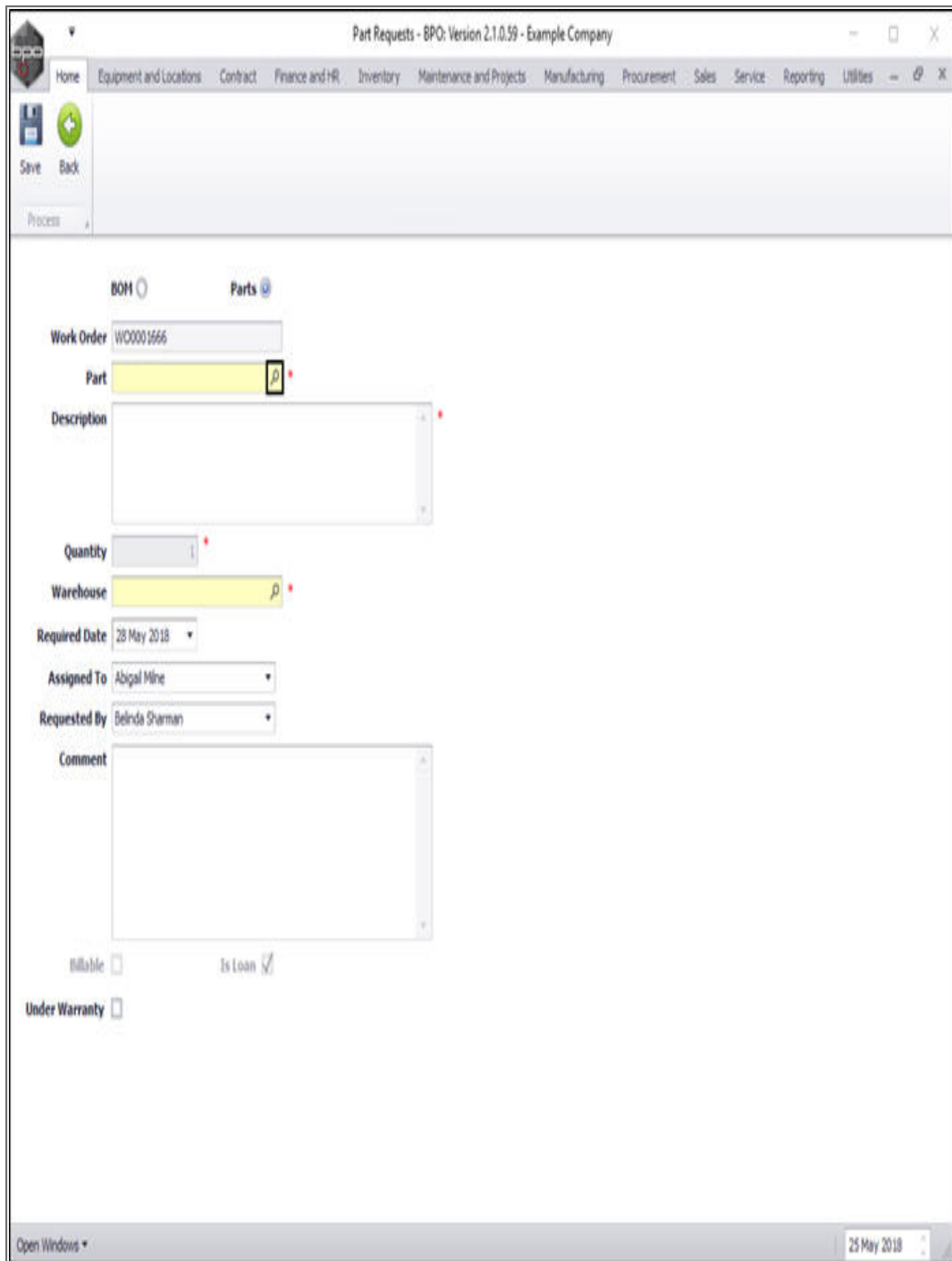
Requested By Belinda Sherman

Comment

Billable ☐ Is Loan ☒ Under Warranty ☐

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- **Part:** Click on the **search** button in this field.




Part Requests - BPO: Version 2.1.0.59 - Example Company

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

Save Back Process


BOM Parts

Work Order WO0001666

Part 

Description

Quantity 1

Warehouse 

Required Date 28 May 2018

Assigned To Abigail Mire

Requested By Belinda Sherman

Comment

Billable ☐ Is Loan ☒ Under Warranty ☐

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The **Select a part for this work order** screen will pop up.

- Click on the **row selector** in front of the **part** you wish to link to this **loan request**.
  - **Note:** The loan item selected should preferably be the same model as the item being repaired, to ensure minimum usage disruption during the loan period. In this example an SP2020 Sprint copier machine is being repaired so the selected loan machine is also an SP2020 Sprint machine.
- Click on **Ok**.

Part Requests - BPO: Version 2.1.0.59 - Example Company

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

Save | Back | Process

BOM | Parts

Work Order: W00001666

Part:

Description:

Quantity:

Warehouse:

Required Date: 20 May 2018

Assigned To: Abigail Milne

Requested By: Belinda Sherman

Comment:

Billable: ☐ Is Loan: ☒

Under Warranty: ☐

Select a part for this work order

Home | Ok | Back | Save Layout

Process | Format

Drag a column header here to group by that column

PartCode	Description	Rate	PartType	Status	TaxType	CatDescription	ModelNo	Weight
DR111111	Drum	15.00	B	A	VAT	Accessories		
KM250MFP	Konica Minolta Colour Multi-Functional Copier	15.00	A	A	VAT	Hardware		
K2N-122TFB	Kruger ZN Fax Machine	15.00	A	A	VAT	Hardware	ZN122	
NMA0H	New Machine	15.00	A	A	VAT	Hardware		
POMON001	PC Monitor - Samsung	15.00	A	A	VAT	Accessories		
SP1020	Copier	15.00	A	A	VAT	Hardware	SP1020	
SP1414	SP1414 Copier	15.00	A	A	VAT	Hardware		35.7
SP1717MFC	SP1717 Multi Functional Copier	15.00	A	A	VAT	Hardware		
SP1818	Sprint copier	15.00	A	A	VAT	Hardware		
SP19-123456	SP19-12 Colour Copier	15.00	A	A	VAT	Hardware	SP19-12	
SP1919	SP1919 Sprint Colour MFC	15.00	A	A	VAT	Hardware	1919	
SP2020	SP2020 Sprint Colour Multi Functional Copier	15.00	A	A	VAT	Hardware	SP2020	5.2
SP204	SP204 Colour Copier	15.00	A	A	VAT	Hardware	SP204	
SP2121	SP2121 Copier	15.00	A	A	VAT	Hardware		
ED60N	Exelint Polaris Printer	15.00	A	A	VAT	Hardware		

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- **Part:** This field will now be populated with the *part code* selected in the previous step.

- **Description:** This field will now be populated based on the part code *initially* selected.
  - **Quantity:** This field is set to **1** and is not editable.
  - **Warehouse:** The system will populate this field, as this request must be against the **Assets** warehouse
  - **Required Date:** This will auto populate with the current date, You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
  - **Assigned To:** Click on the drop-down arrow and select from the menu, the person responsible for the part request.
  - **Requested By:** Click on the drop-down arrow and select from the menu, the person who initiated this part request.
  - **Comments:** Type in any comments, if required.
  - **Is Billable:** You will note that you cannot make this item Billable.
  - **Is Loan:** You will see this request is automatically marked as a loan unit.
  - **Under Warranty:** Click in this check box if this loan unit is under warranty.
- When you have finished editing the details in this screen, click on **Save**.

Part Requests - BPO: Version 2.1.0.59 - Example Company

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

Save Back

Process

BOM ☐ Parts ☒

Work Order WO0001666

Part SP2020

Description SP2020 Sprint Colour Multi Functional Copier

Quantity 1

Warehouse Assets Warehouse

Required Date 28 May 2018

Assigned To Abigail Milne

Requested By Belinda Sharman

Comment

Billable ☐ Is Loan ☒

Under Warranty ☐

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- You will return to the **Loan Requests for WO Code [ ]** listing screen.

- A ***Part Request Processing*** message box will pop up informing you that;
  - ***The part request for part [ ] has been saved successfully to WO: [ ].***
- Click on ***Ok***.

Loan Requests for WO Code WO0001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Pri... Cur... Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Bilable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Shaman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	0.00	28 May 2018	Belinda Shaman		No	A

Part Request Processing

The part request for part SP2020 has been saved successfully to WO : WO0001666.

OK

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## PRINT LOAN UNIT DELIVERY NOTE

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**Note:** This can only be done after **Adding the Loan Unit Meter Reading** and the **Loan unit has been issued**.

- Click in front of the **issued** loan unit request.
- Click on drop-down arrow on the **Print** button.

Loan Requests for WO Code W00001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Pro... Cur... Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Bilable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Sharman		No	A

Open Windows 25 May 2018

- A **Print options** menu will be displayed.
- Click on **Delivery Note**.

Loan Requests for WO Code W00001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Pro... Cur...

Delivery Note  
Loan Return


Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Blable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Sharman		No	A

Open Windows 25 May 2018

- The **Loan Unit Delivery Note** report preview screen will be displayed.

- Loan Unit Delivery Note**



**Example Company**

Street No and Road Name PO Box 1234  
 Area New Town  
 City Durban  
 South Africa South Africa  
 0000 1234  
 Reg No.: 0000000ase4521 Fax No.: 031 12 4545  
 VAT No.: 0000000 Tel No.: 031 123 4567

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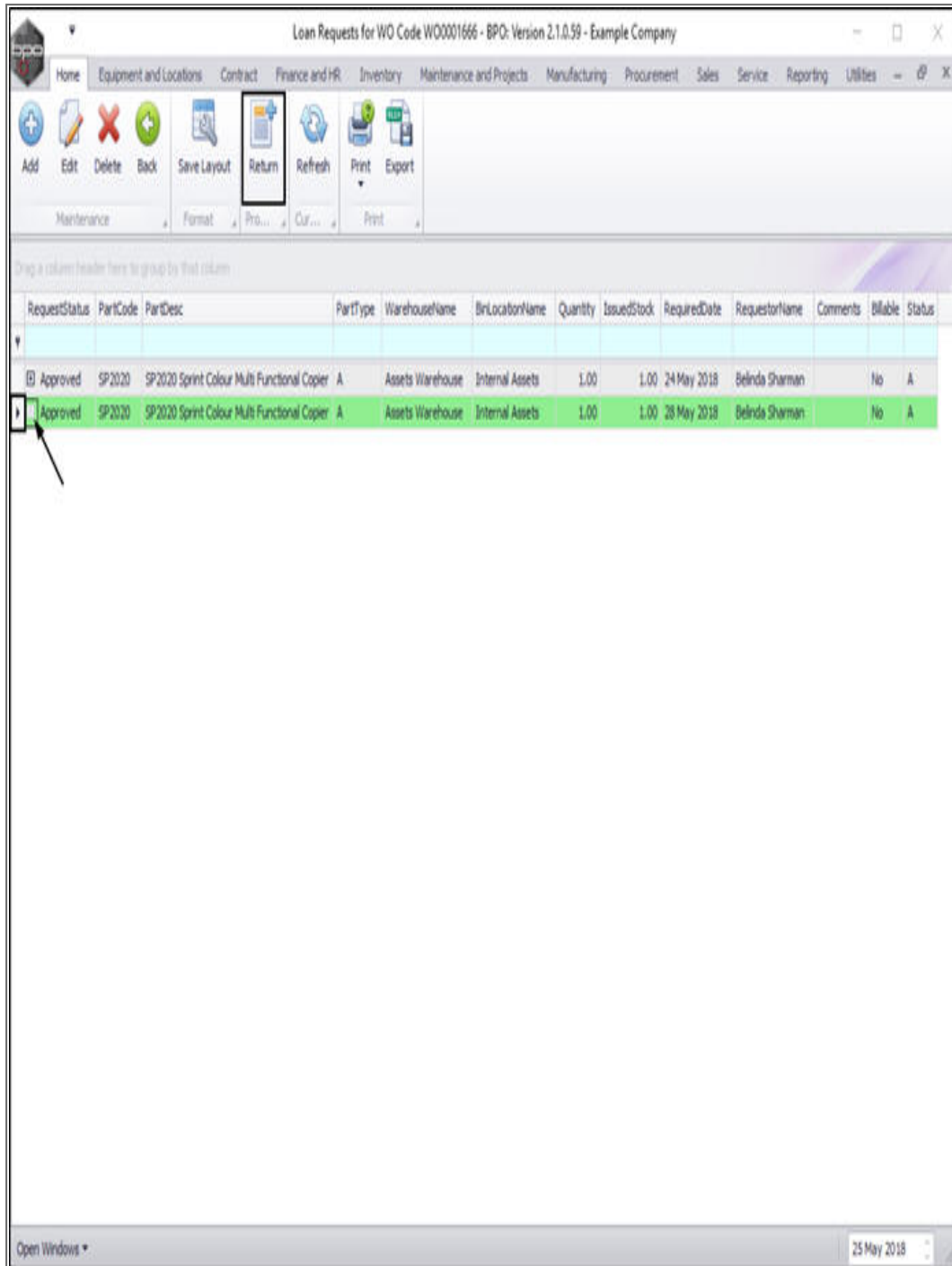
Processed By : Abigail Milne  <b>Reference:</b> PQ00001961 <b>Order No.:</b> OR00002237 <b>Order Ref.:</b> New Deal Sale 111  <b>Contract No.:</b> <b>Employee Name:</b> Abigail Milne  <b>Contact:</b> Julia Ribson <b>Customer:</b> Hope Works	<b>Document Ref.:</b> S100000775 <b>Date:</b> 29 May 2018 <b>Time:</b> 00:00:00  <b>Additional Ref.:</b> W00001968 <b>Reference Type:</b> Work Order <b>Location:</b>  <b>Serial No.:</b>  <b>Shipping Address:</b> Plot 51 Leaf Road Forest Hills New Town Durban South
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Code	Description	Serial No	Asset No	Quantity
SF0101	SF0101 Sprint Colour Multi-Functional Copier	A61	A600000313	1.00
		<b>Meter Description</b>	<b>Reading Date</b>	<b>Reading</b>
		Press Meter	02 Jan 1900	0
		Colour Meter	02 Jan 1900	0

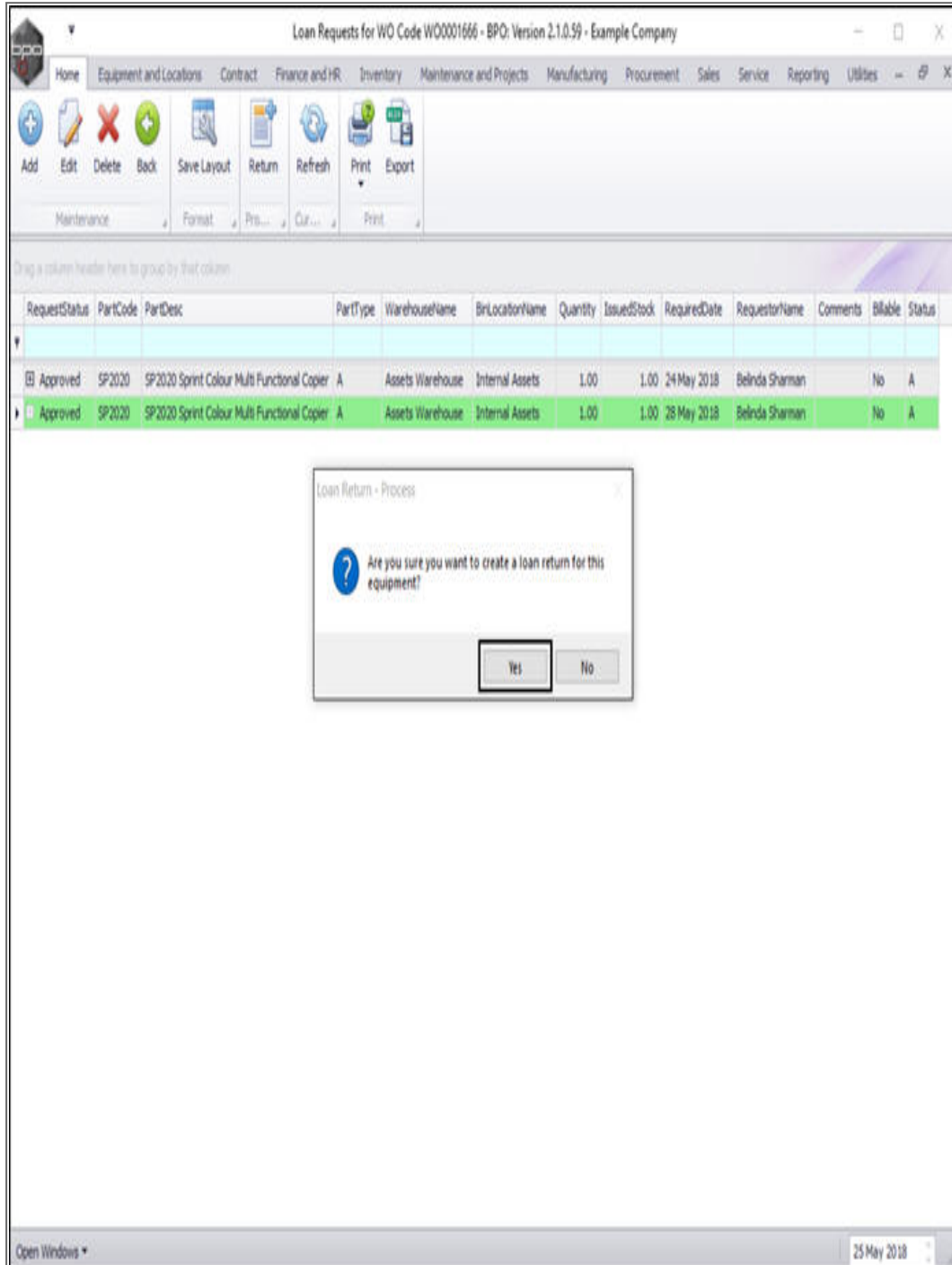
- Click on the **row selector** in front of the **loan unit request** that you wish to **return**.
- Click on **Return**.
  - You will note in this image that the **expand** button next to the row selector is **'feint'** this indicates that

the frame does not contain any information (in this case, a ***Loan Return Request***) yet.



RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Sharman		No	A

- A **Loan Return - Process** message box will pop up, asking;
  - **Are you sure you want to create a loan return for this equipment?**
- Click on **Yes**.



Loan Requests for WO Code WO0001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Sharman		No	A

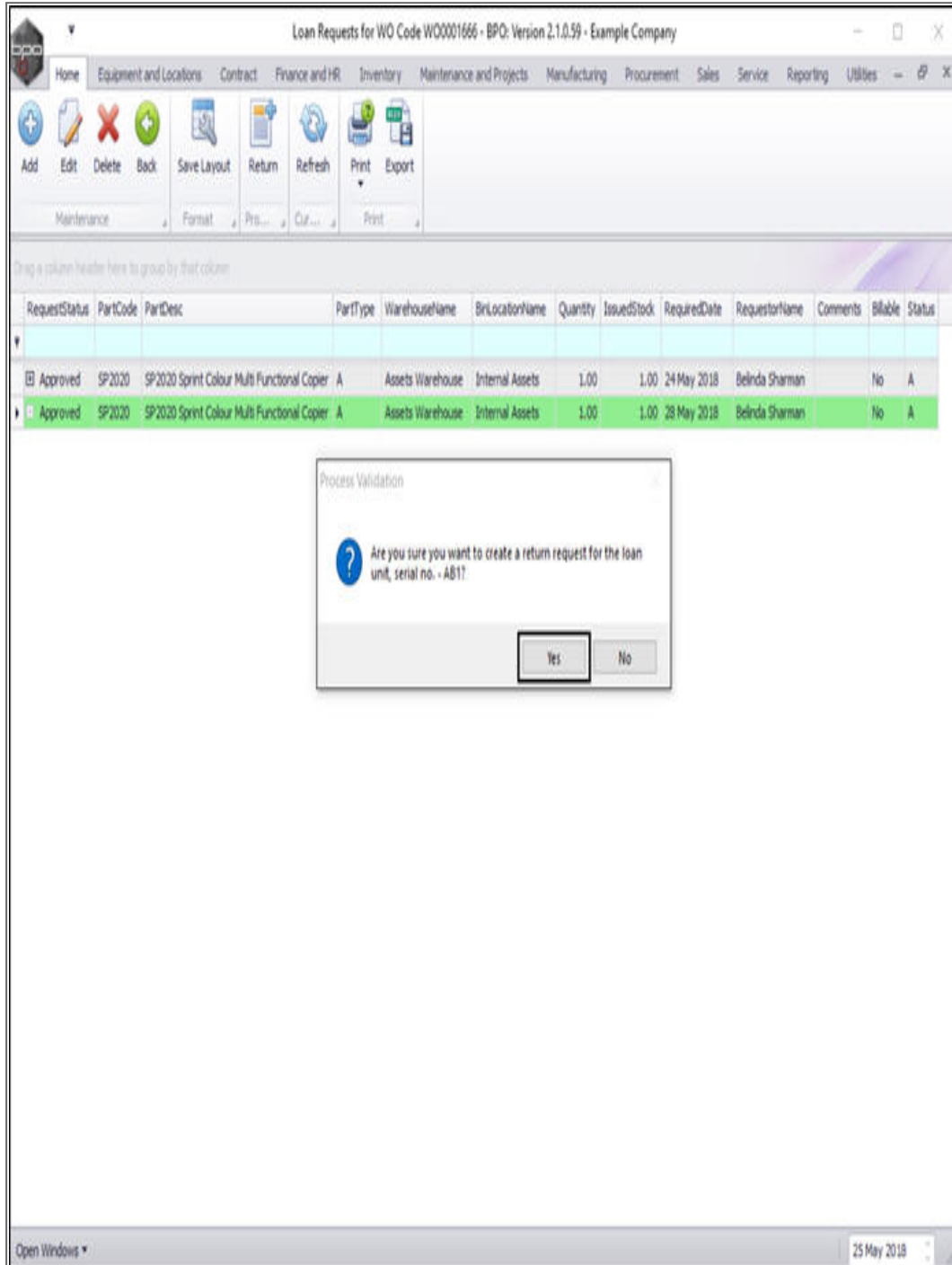
Loan Return - Process

Are you sure you want to create a loan return for this equipment?

Yes No

Open Windows 25 May 2018

- A **Process Validation** message box will pop up asking;
  - **Are you sure you want to create a return request for the loan unit, serial no.- [ ] ?**
- Click on **Yes**.



- Click on the **expand** button in the **row** of the loan request.
  - You will note that this button is now **'bold'** indicating that there is now content, (a **Loan Return Request**) here.

Loan Requests for WO Code WO0001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Pri... Cut... Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Bilable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Sharman		No	A

Open Windows 25 May 2018

- The loan unit **Return** frame will be expanded.
- Now you can view the details of the Return Request here and you will now be able to **print** the **Loan Return Note**.

- **Collapse** the Return frame when you have finished viewing the information.

Loan Requests for WO Code WO0001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

Maintenance Format Pro... Cur... Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Bilable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Sharman		No	A

Return

DocId	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCode	WODescription	Reason	RequestorName	RequestStatus
RQ00000206	SP2020	A	SP2020 Sprint Colour Multi Functional Copier	AB1	SP2020	WO0001666	Service Request - machine jamming...	Loan Return	Abigail Milne	Return - New

Open Windows 25 May 2018

## PRINT LOAN RETURN NOTE

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- Ensure that the ***row selector*** is in front of the ***loan request*** that you wish to print the ***return note*** for.
- Click on the ***drop-down arrow*** on the ***Print*** button.

Loan Requests for WO Code W0001666 - BPO: Version 2.1.0.59 - Example Company

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

Add Edit Delete Back Save Layout Return Refresh Print Export

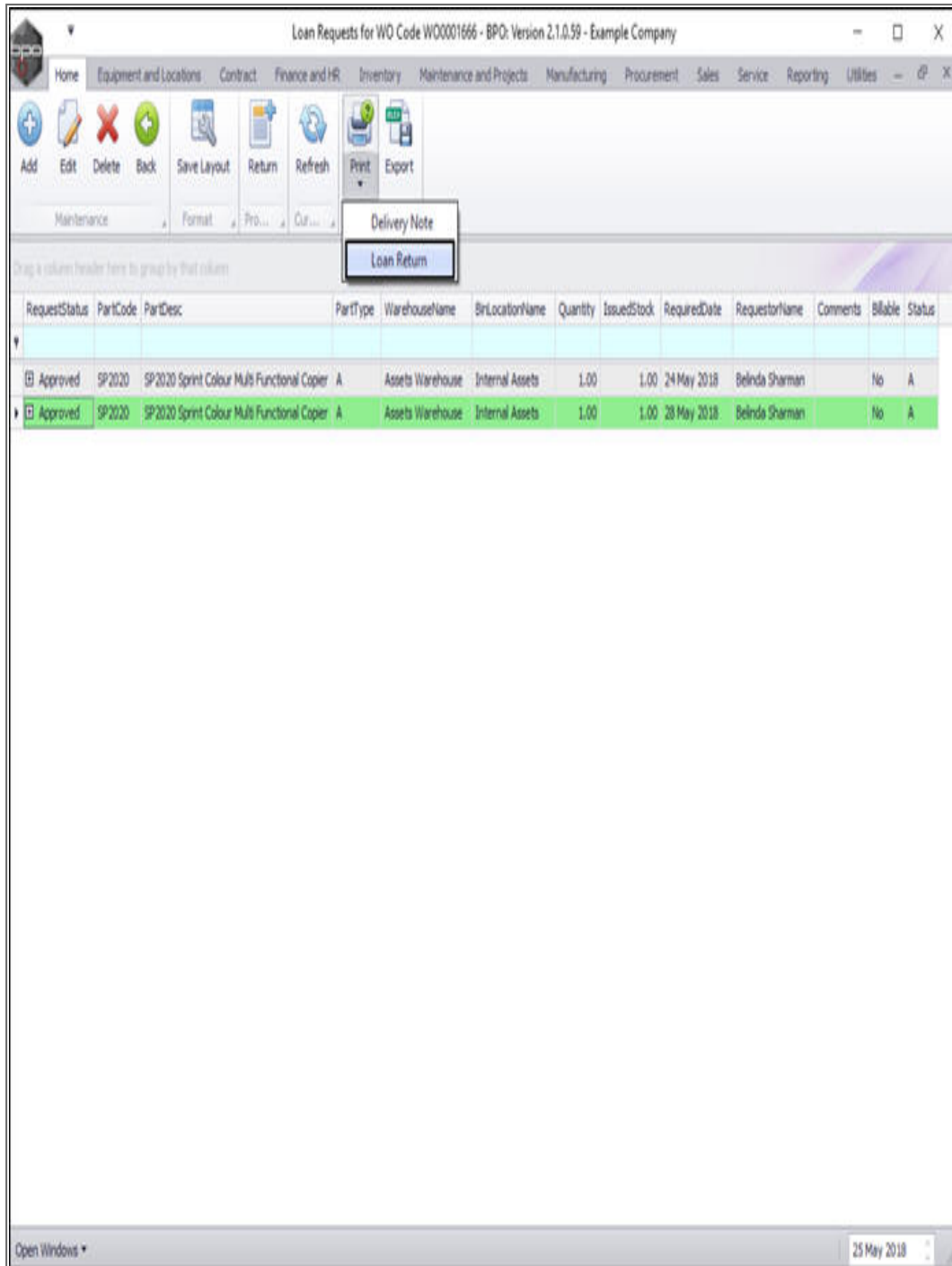
Maintenance Format Pro... Cur... Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Sharman		No	A

Open Windows 25 May 2018

- A **Print options menu** will be displayed.
- Click on **Loan Return**.



- The **Loan Unit Return** report preview screen will be displayed.
- From here you can **View**, **Print**, **Export** or **Email** the document.
- **Close** the report preview screen when you are done.

The unit can then be returned, and the meter reading updated:

- MNU.122.026