

We are currently updating our site; thank you for your patience.

## SERVICE

### MY WORK – 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 Unit machines must be Internal Assets, **convert a stock item to an asset**, if you do not have an internal asset ready to be sent out.

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**Ribbon Access:** Maintenance / Projects > Work Requests

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- The **My Work** listing screen will be displayed.

## REQUEST LOAN UNIT ISSUE

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- Click on the **row selector** in front of the **work order** you wish to request a **loan unit** against.
- Click on **Edit**.
  - **Note:** The work order has to be linked to a call.

The **Maintain WO - Ref [ ]** screen will be displayed.

- Click on the **Loans** tile.

Maintain WO - Ref 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

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

**Loans**

Swap Outs

Meters

Expenses

Meters

Open Windows

24 May 2018

Description: Service Request - machine jamming during printing.

Requestor: Abigal Mine

WO Type: Repair

Priority: 2

Request Date: 22 May 2018 10:59:57

Status: N - Completed

Billable: ☐

Capitalise: ☐

Work Order Item

Functional Location:

Equipment:

Item: 20-12345

Comment:

Links:

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CN0000563
PMWG	Project Reference	

Schedule:

Assigned To: Abigal Mine

Assigned By: Abigal Mine

Scheduled Start: 22 May 2018 12:00:00

Scheduled End: 22 Jun 2018 14:00:00

Actual Start: 22 Jun 2018 00:00:00

Actual End: 22 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

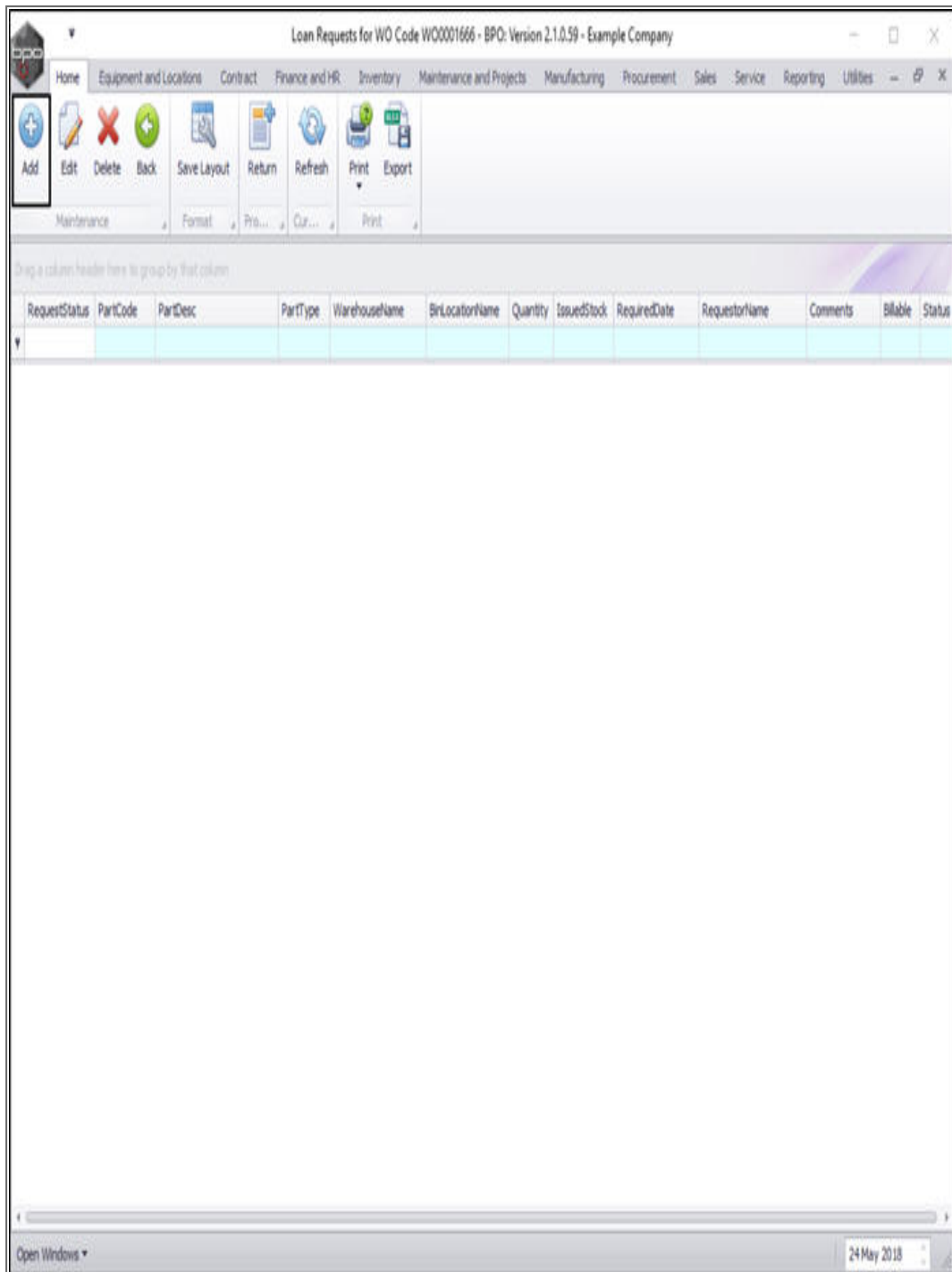
Rectification Code:

Rectification Comments:

Completion Date: 21 Jun 2018 00:00:00

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

- Click on **Add**.



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 second step 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

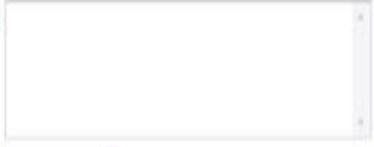
Save Back

Process


BOH  Parts 

Work Order WO0001666

Part  \*

Description 

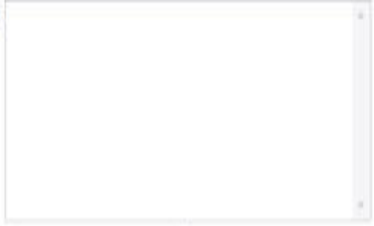
Quantity 1 \*

Warehouse  \*

Required Date 24 May 2018

Assigned To Abigail Mline

Requested By Belinda Sharman

Comment 


Billable ☐ Is Loan ☒

Under Warranty ☐

Open Windows 24 May 2018



- **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

BOH

Parts

Work Order

WO0001666

Part

Description

Quantity

1

Warehouse

Required Date

24 May 2018

Assigned To

Abigail Mlne

Requested By

Belinda Sharman

Comment

Billable

☐

Is Loan

☒

Under Warranty

☐

Open Windows

24 May 2018

- 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 WO0001666

Part

Description

Quantity

Warehouse

Required Date 24 May 2018

Assigned To Abigail Mline

Requested By Belinda Sharman

Comment

Billable ☐

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	Weight	Volume	ModelNo	UnitOfMeasure
SP1717MFC	SP1717 Multi Functional C...	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 Mult...	15.00	A	A	VAT	Hardware	5.2		SP2020	ea
SP204	SP204 Colour Copier	15.00	A	A	VAT	Hardware			SP204	
SP2121	SP2121 Copier	15.00	A	A	VAT	Hardware				
SP900	Sprint Colour Copier	15.00	A	A	VAT	Hardware				
SP6161	SP6161 Sprint Copier	15.00	A	A	VAT	Hardware			SP6161	
SP902	SP902 Copier	15.00	A	A	VAT	Hardware			SP902	
TEST123	Test Part	15.00	A	A	VAT	Hardware	10	20	1023	ea
TMA01	Test Machine	15.00	A	A	VAT	Hardware				
X821932-002	Microsoft Mouse	15.00	A	A	VAT	Accessories			1454	

Open Windows 24 May 2018

- **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.

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

BOH Parts

Work Order W00001666

Part SP 2020

Description SP 2020 Sprint Colour Multi Functional Copier

Quantity 1

Warehouse Assets Warehouse

Required Date 24 May 2018

Assigned To Abigail Mire

Requested By Belinda Sharman

Comment

Billable ☐ Is Loan ☒ Under Warranty ☐

Open Windows 24 May 2018

- 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

BOH Parts

Work Order WO0001666

Part SP 2020

Description SP 2020 Sprint Colour Multi Functional Copier

Quantity 1

Warehouse Assets Warehouse

Required Date 24 May 2018

Assigned To Abigail Mline

Requested By Belinda Sharman

Comment

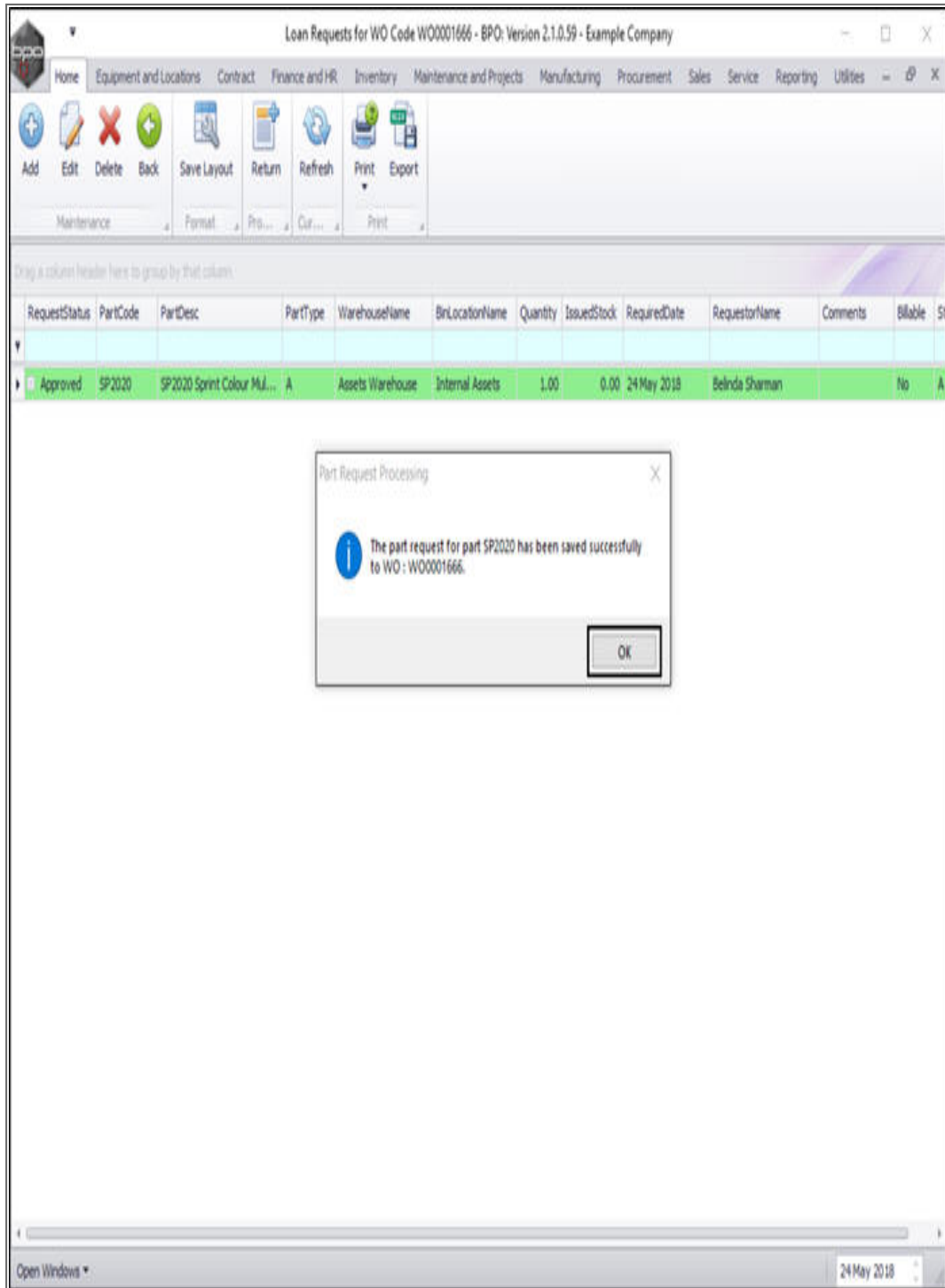
Billable ☐ Is Loan ☒

Under Warranty ☐

Open Windows 24 May 2018

- 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 Pro... Cut... 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 M...	A	Assets Warehouse	Internal Assets	1.00	0.00	24 May 2018	Belinda Sharman		No	A

Part Request Processing

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

OK

Open Windows 24 May 2018

**Note:** Only once the loan unit request has been **approved** and **issued** can the delivery note be printed.



## PRINT DELIVERY NOTE

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- 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 Prev... 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

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

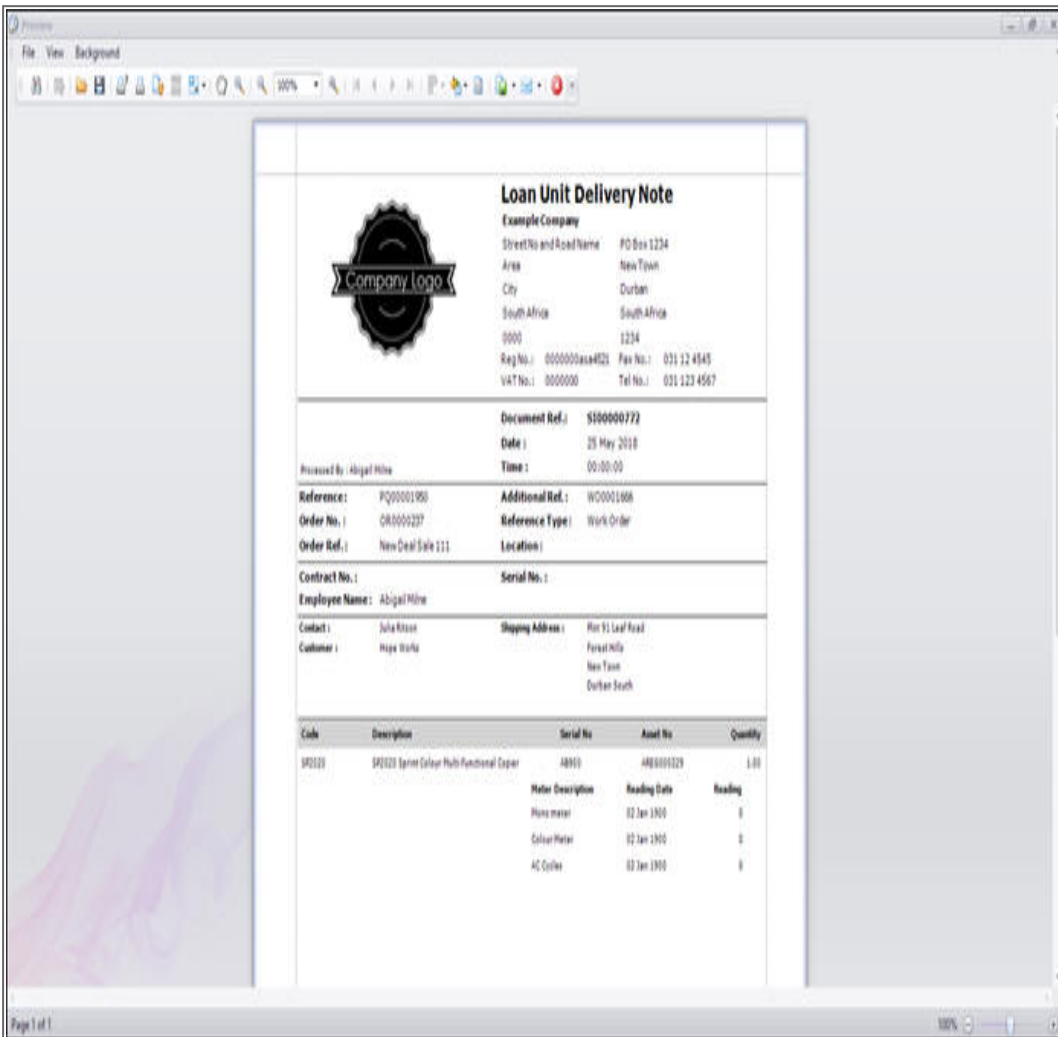
Drag a column header here to group by that column:

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	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

Open Windows 25 May 2018

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

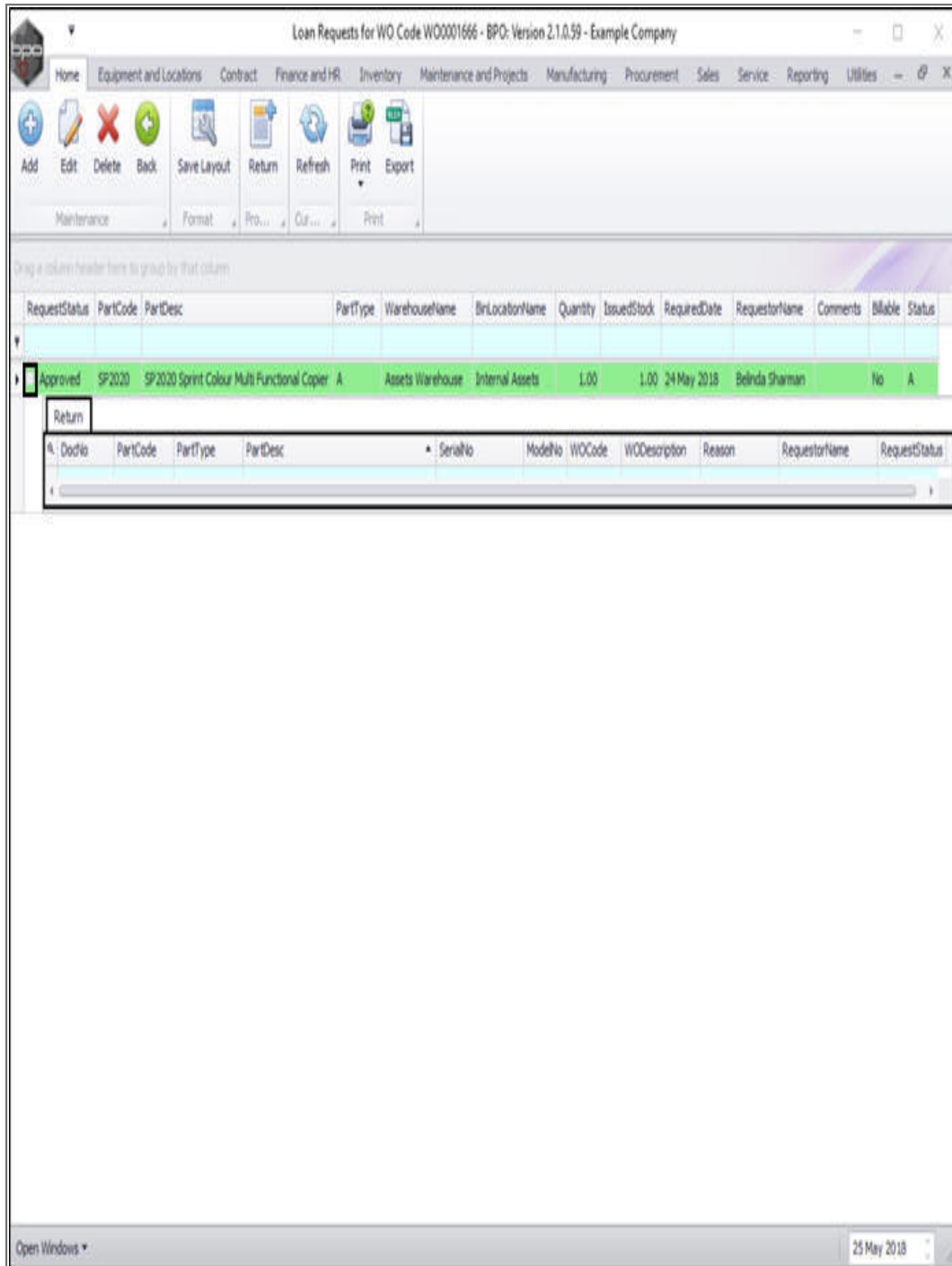
- **Close** the Report Preview screen when you are done.



## CREATE LOAN UNIT RETURN REQUEST

- If a loan return request has **already** been raised, the **expand** button will be '**bold**' and if you click on the **expand** button in the **row** of the loan request, the return request information will be displayed .

- You will note in this image that this expand button is currently '**feint**' this indicates that the frame does not contain any information (in this case, a loan return request) yet.



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... Cut... Print

Drag a column header here to group by that column

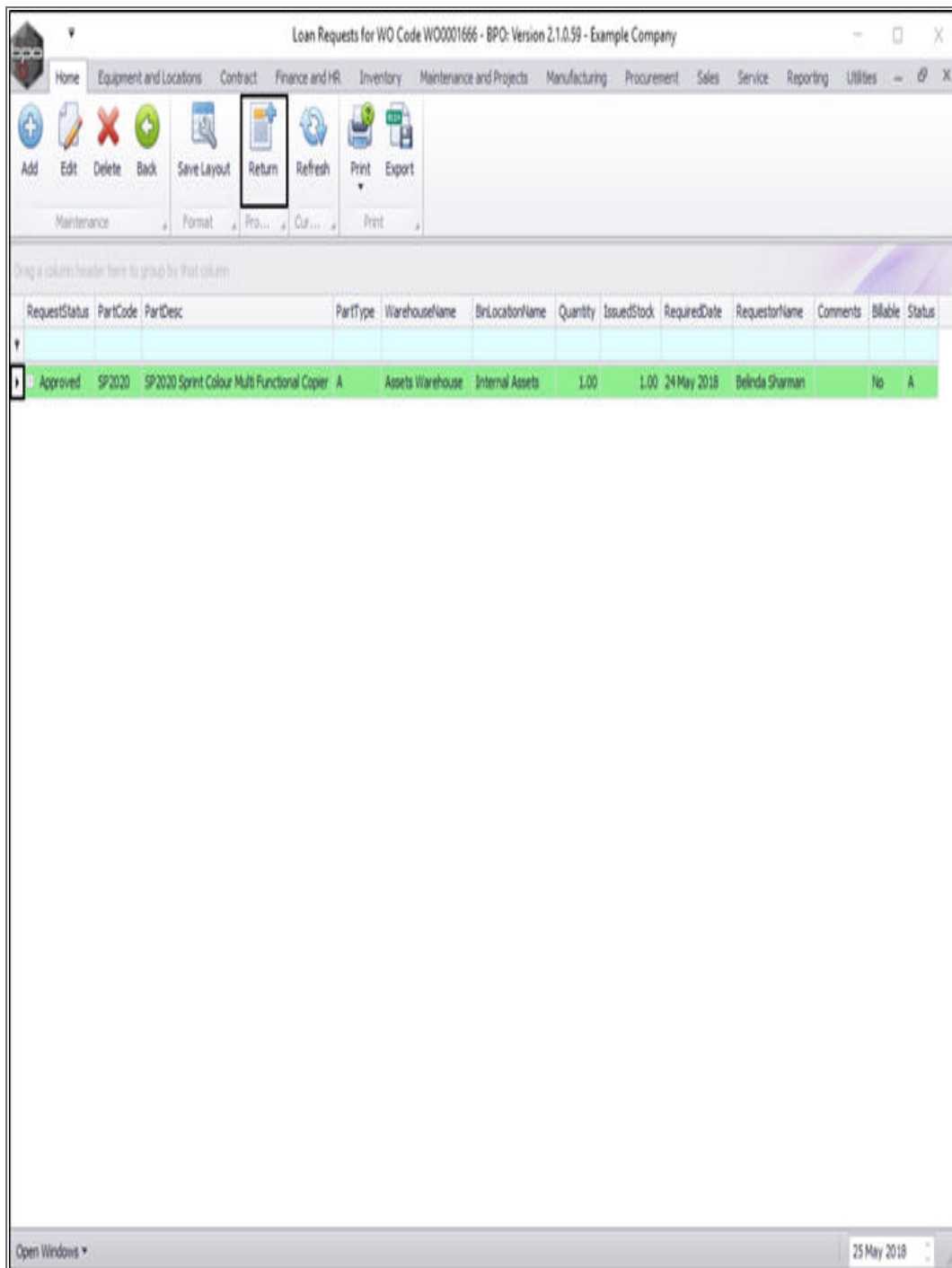
RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Bliable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A

Return

DocNo	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCode	WODescription	Reason	RequestorName	RequestStatus
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Open Windows 25 May 2018

- Click on the **row selector** in front of the **loan unit** you wish to **return**.
- Click on **Return**.



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

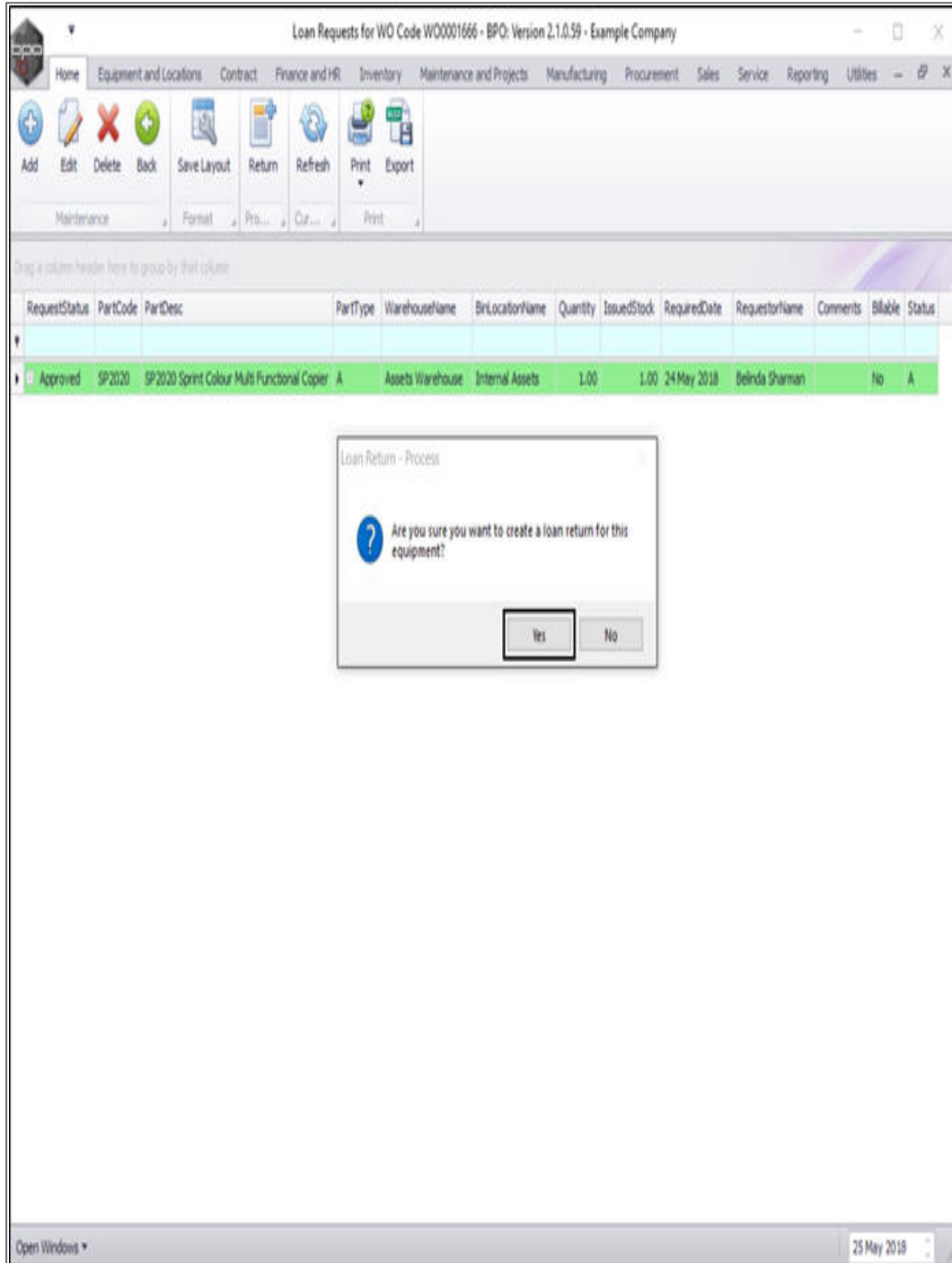
Add Edit Delete Back Save Layout **Return** Refresh Print Export

Drag a column header here to group by that column

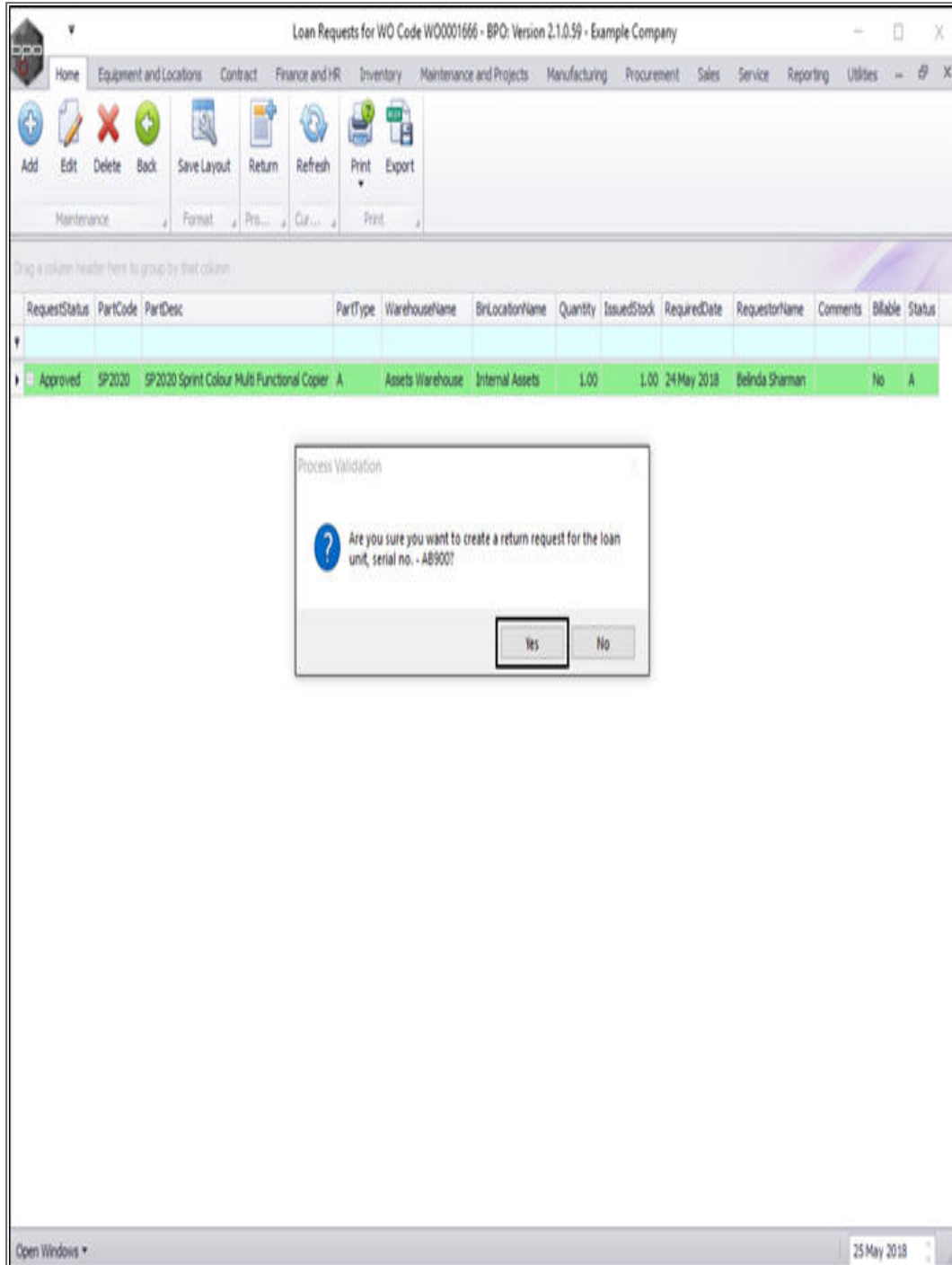
RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman	No	A	

Open Windows 25 May 2018

- 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**.



- 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**.



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 Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Browsable	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

Process Validation

Are you sure you want to create a return request for the loan unit, serial no. - AB900?

Yes No

Open Windows 25 May 2018



## VIEW LOAN UNIT RETURN REQUEST

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- Click on the **expand** button in the **row** of the loan request.
  - You will note that this button is '**bold**' indicating that there is 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... 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 Sharnan		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**.

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## PRINT LOAN UNIT 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 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

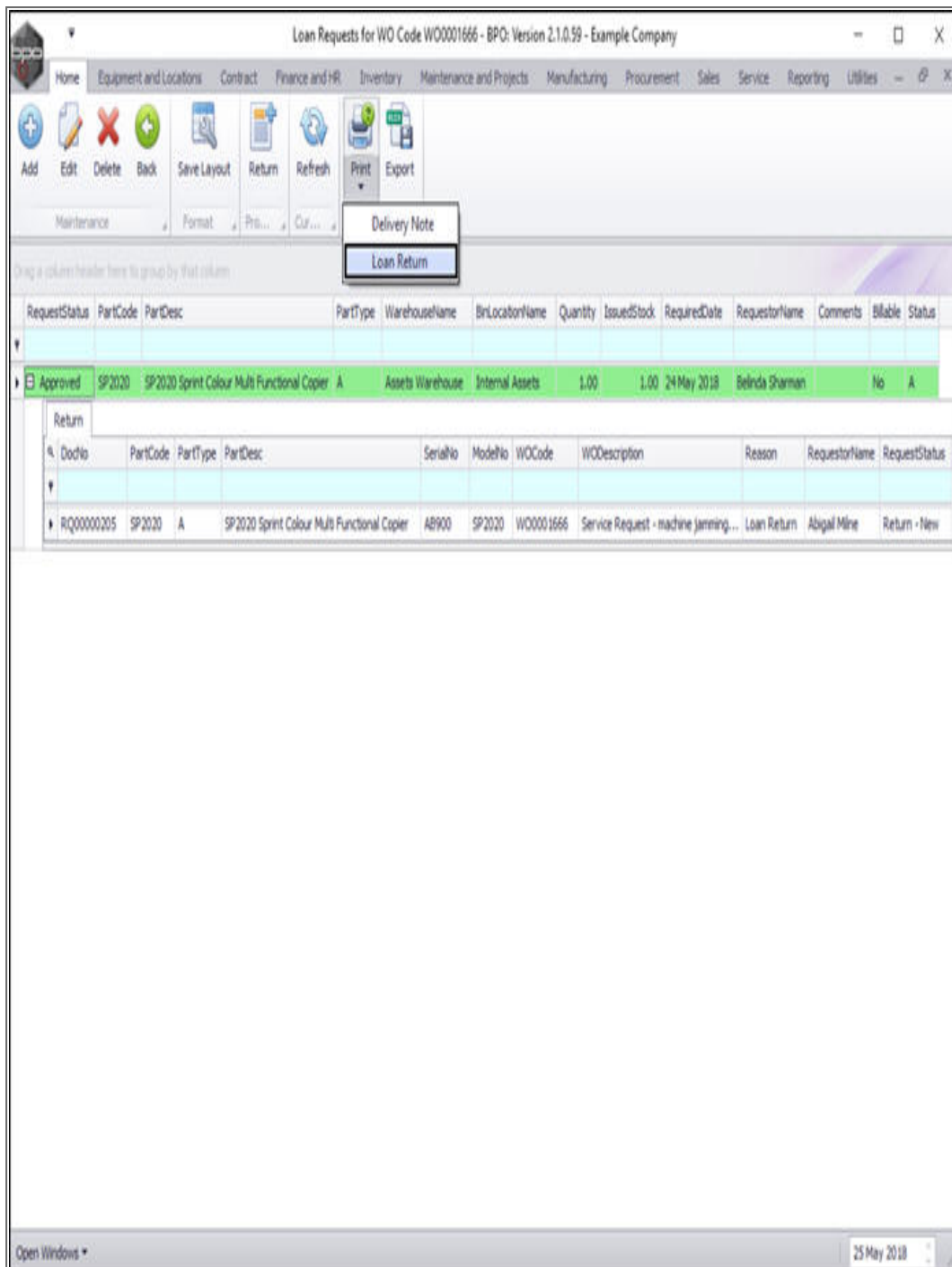
RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharnan		No	A

Return

DodNo	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCode	WODescription	Reason	RequestorName	RequestStatus
RQ000000205	SP2020	A	SP2020 Sprint Colour Multi Functional Copier	A8900	SP2020	WO0001666	Service Request - machine jamming...	Loan Return	Abigail Mine	Return - New

Open Windows 25 May 2018

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



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... 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	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharnan		No	A

Return

DocNo	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCode	WODescription	Reason	RequestorName	RequestStatus
RQ000000205	SP2020	A	SP2020 Sprint Colour Multi Functional Copier	AB900	SP2020	WO0001666	Service Request - machine jamming...	Loan Return	Abigail Mine	Return - New

Open Windows 25 May 2018

- 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 **Loan Unit Return** document will be taken to the **client** on delivery of the repaired machine and collection of the loan unit.
  - **Note:** Update the meter readings before the document is signed off and the loan unit is returned to store.

## Issue Loan Unit

### Loan Unit Processing

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