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.

Ribbon Access: *Maintenance / Projects > Work Requests*

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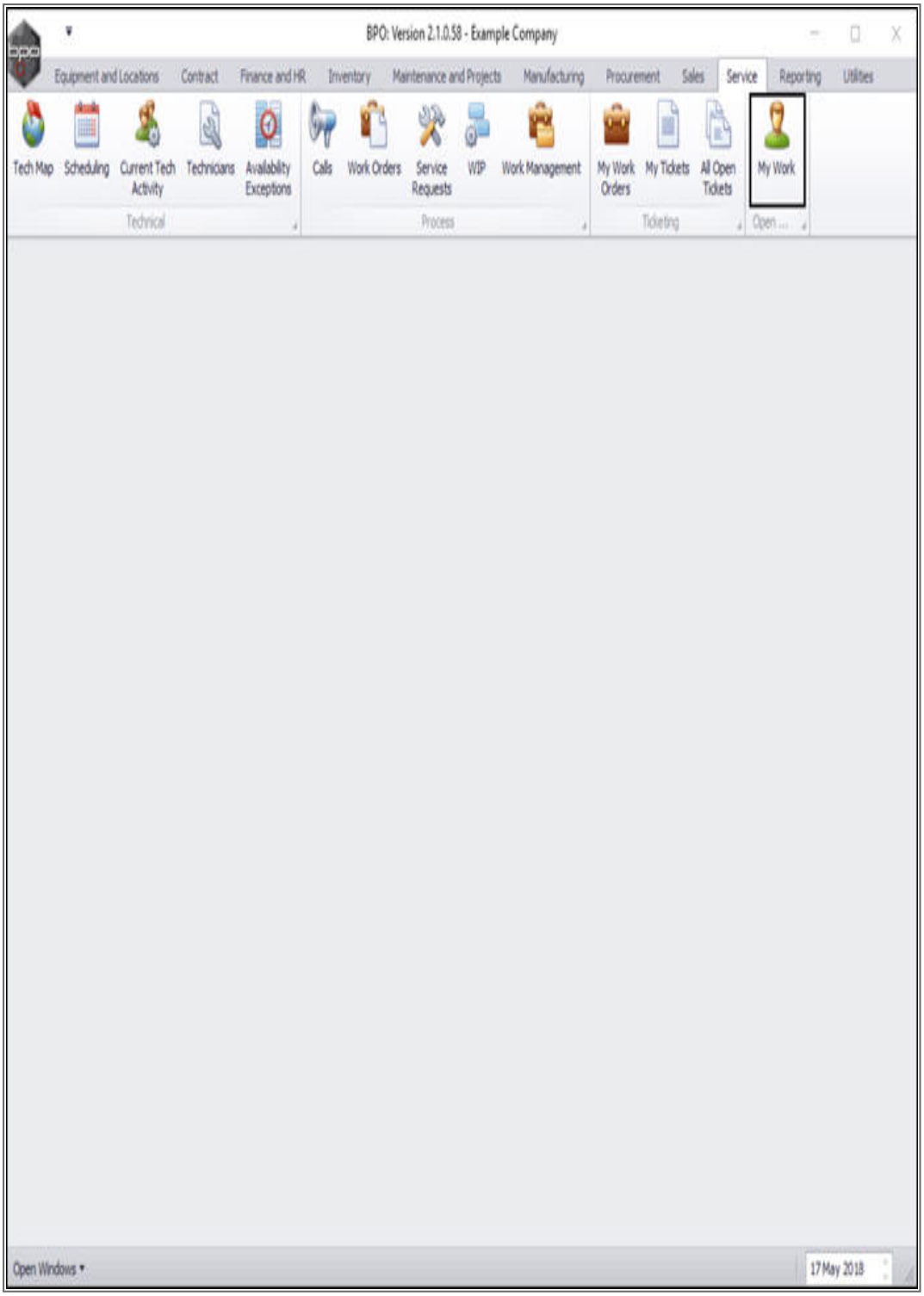

- The ***My Work*** listing screen will be displayed.

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REQUEST LOAN UNIT ISSUE

- 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.

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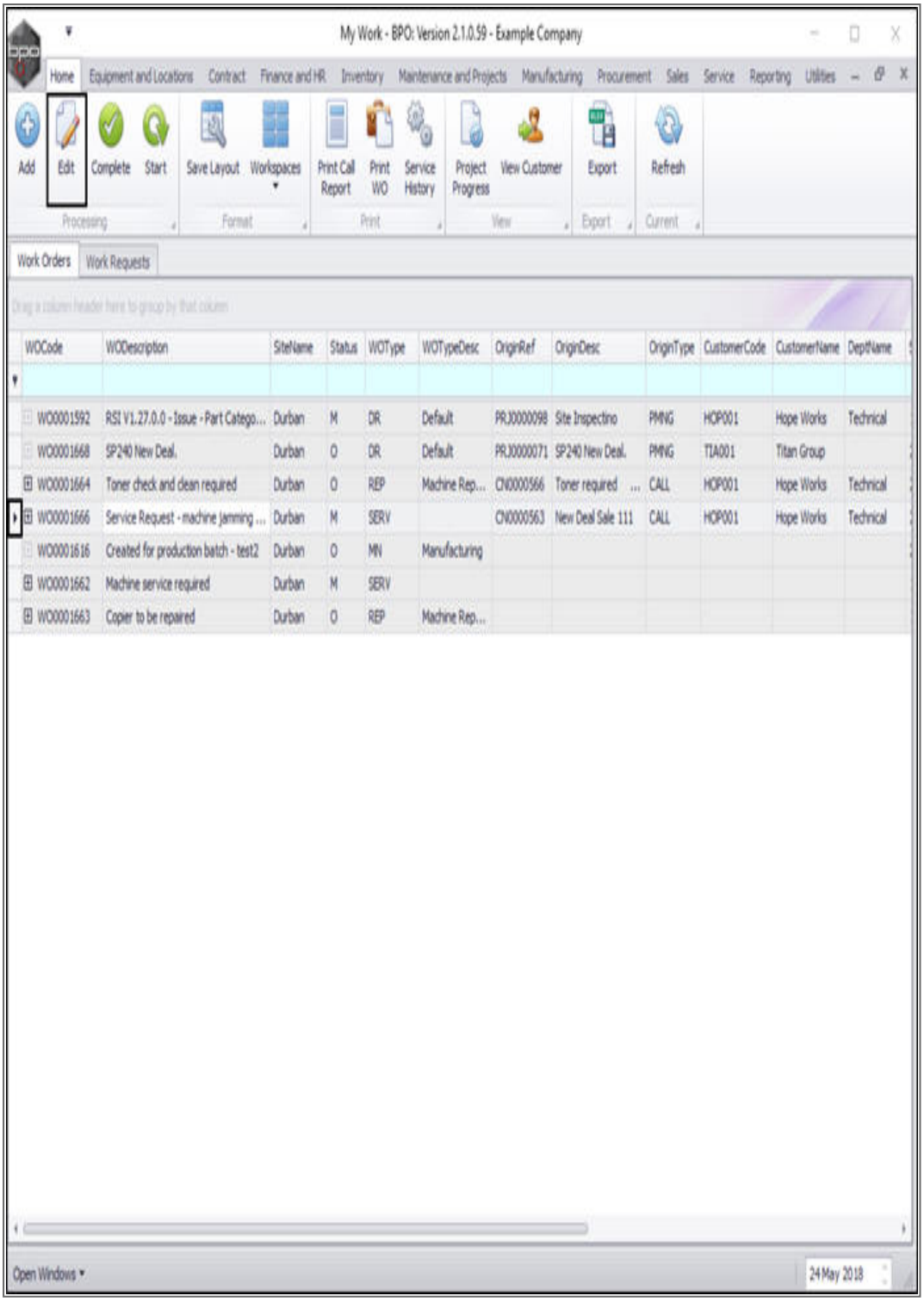

The ***Maintain WO - Ref [ ]*** screen will be displayed.

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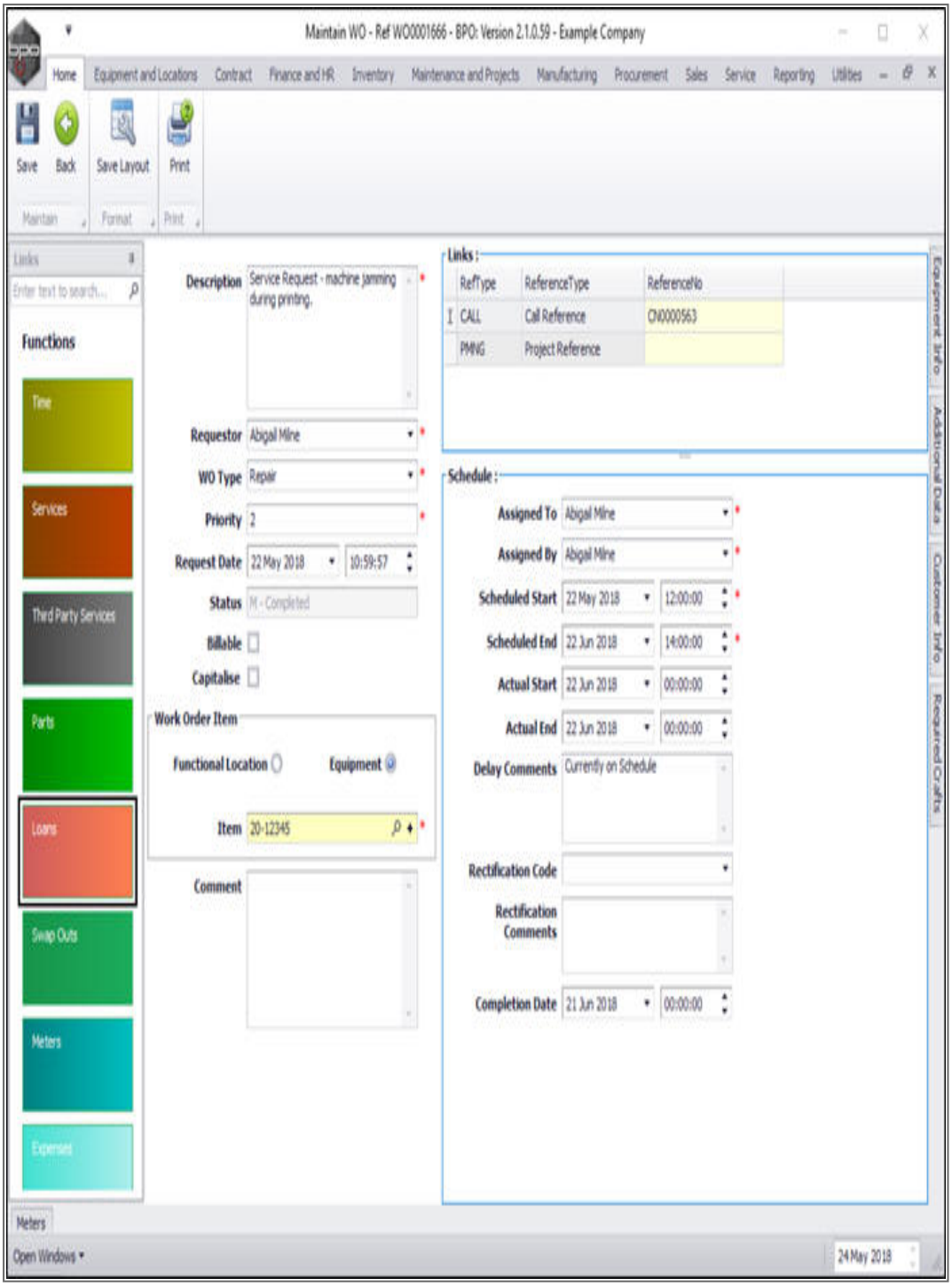
- Click on the ***Loans*** tile.



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

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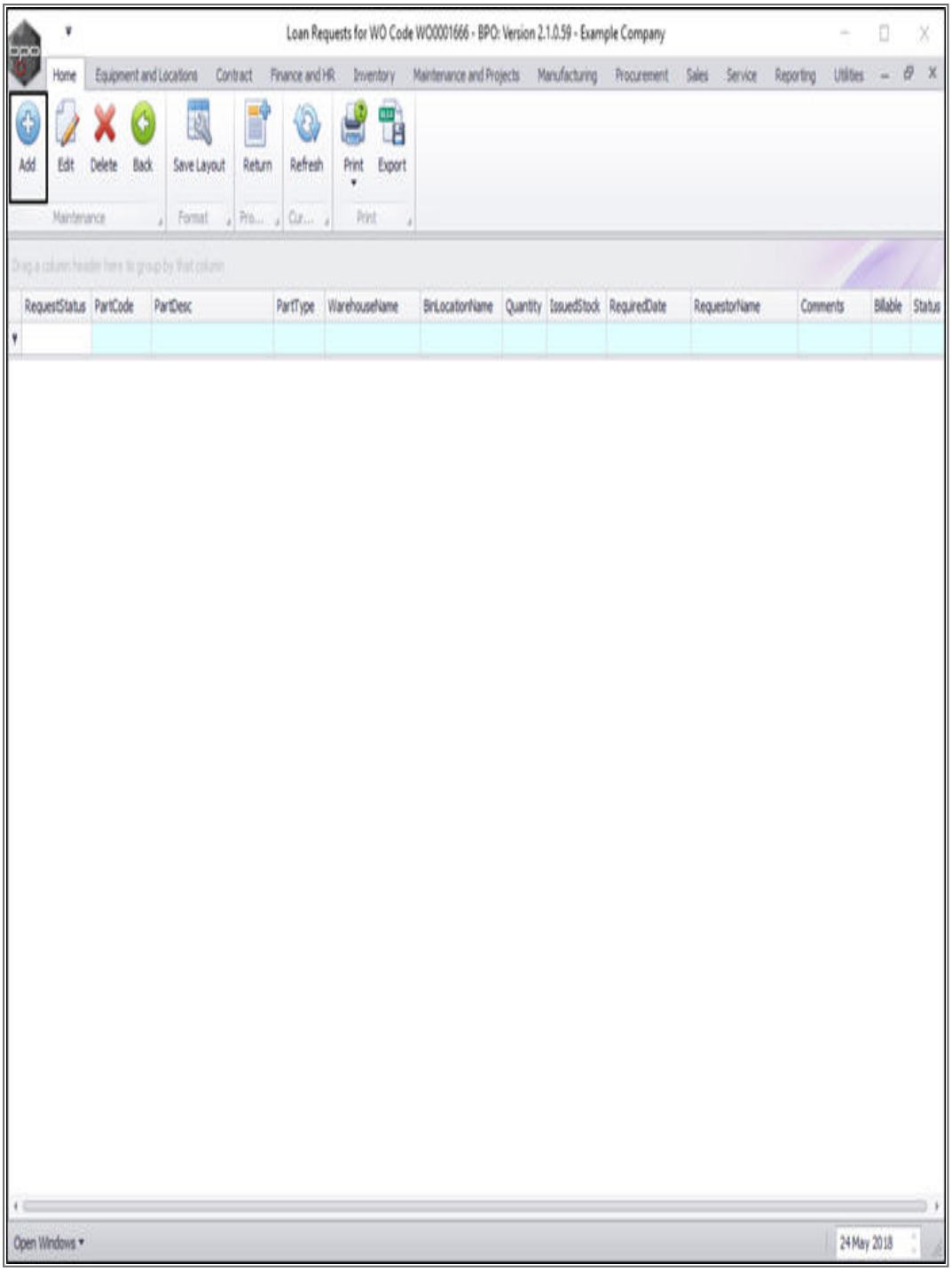
- Click on ***Add***.



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

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- **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.

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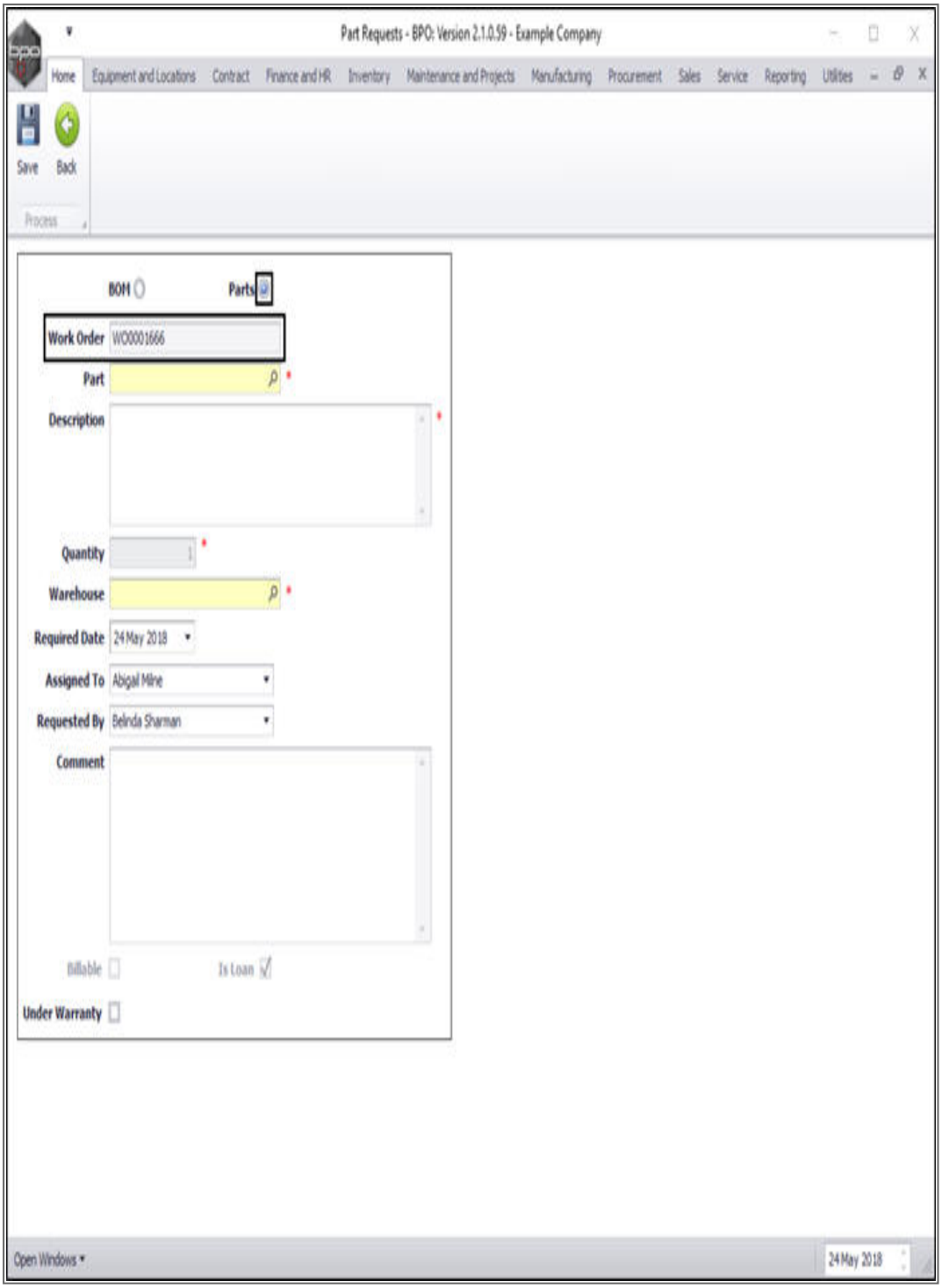

- **Part:** Click on the ***search*** button in this field.

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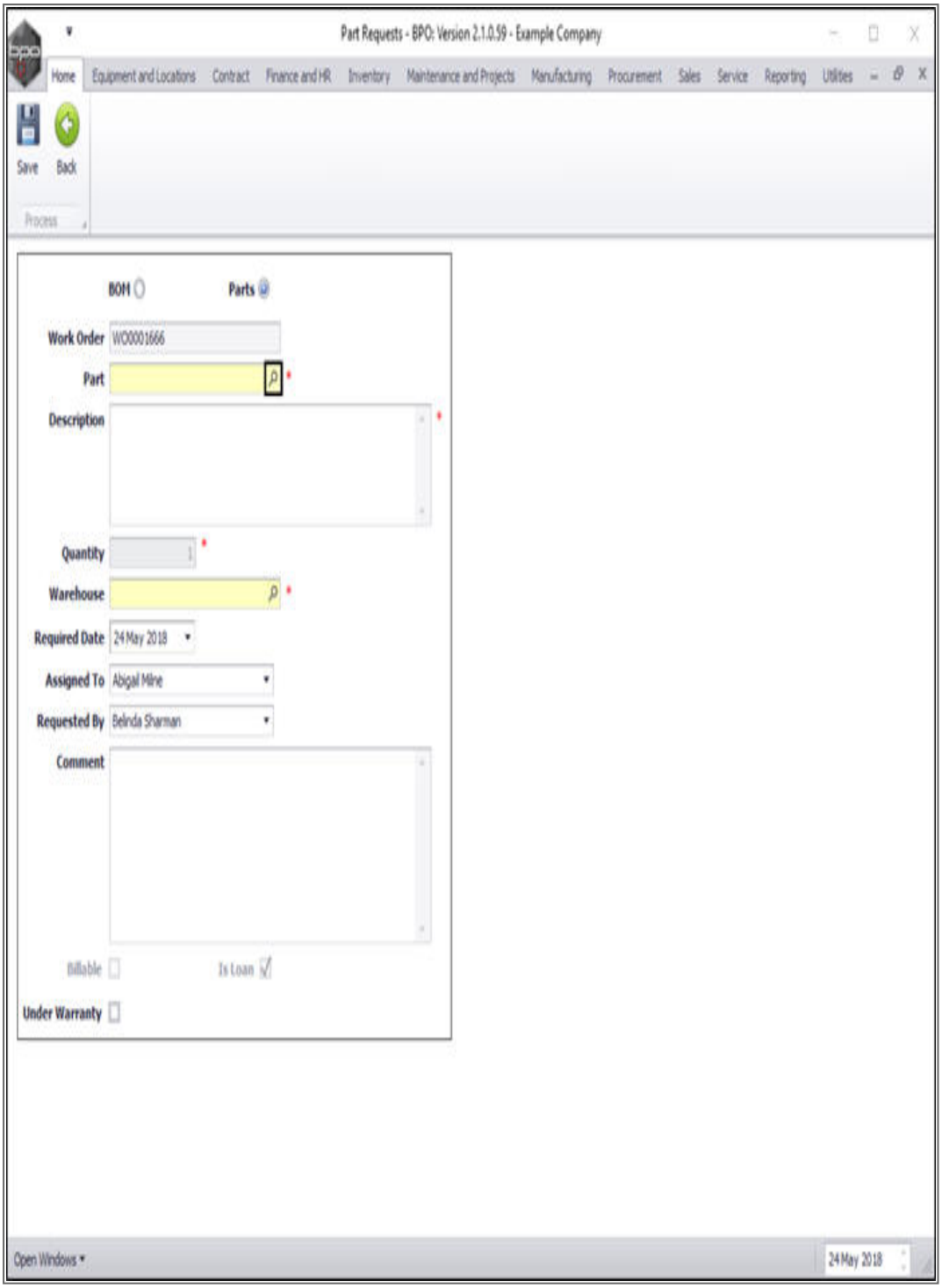

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- The ***Select a part for this work order*** screen will pop up.
- Click on the ***row selector*** in front of the ***part*** you wish to link to this ***loan request***.
    - **Note:** The loan item selected should preferably be the same model as 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***.

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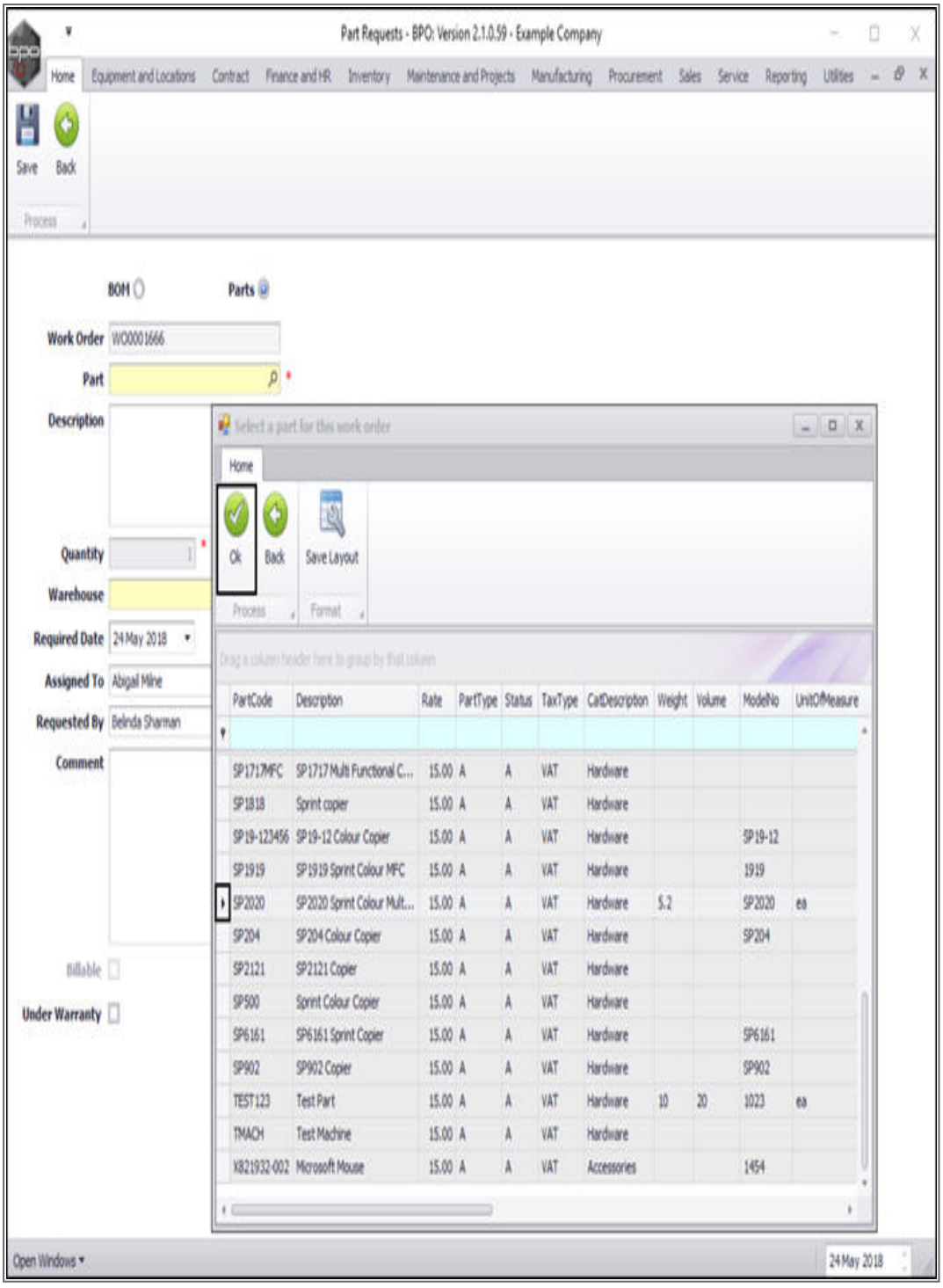

- **Part:** This field will now be populated with the ***part code*** selected in the previous step.

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- **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.

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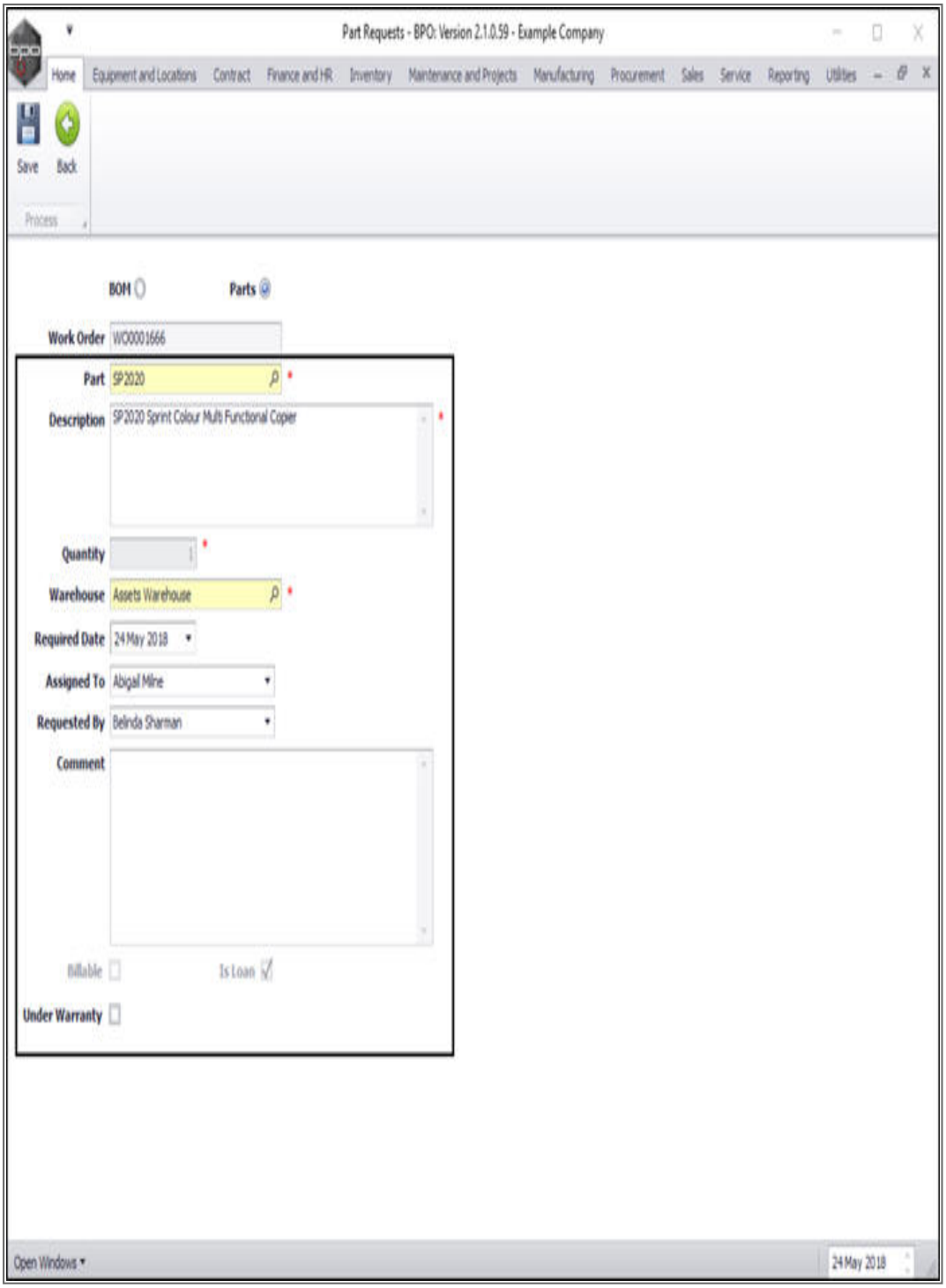

- When you have finished editing the details in this screen, click on ***Save***.

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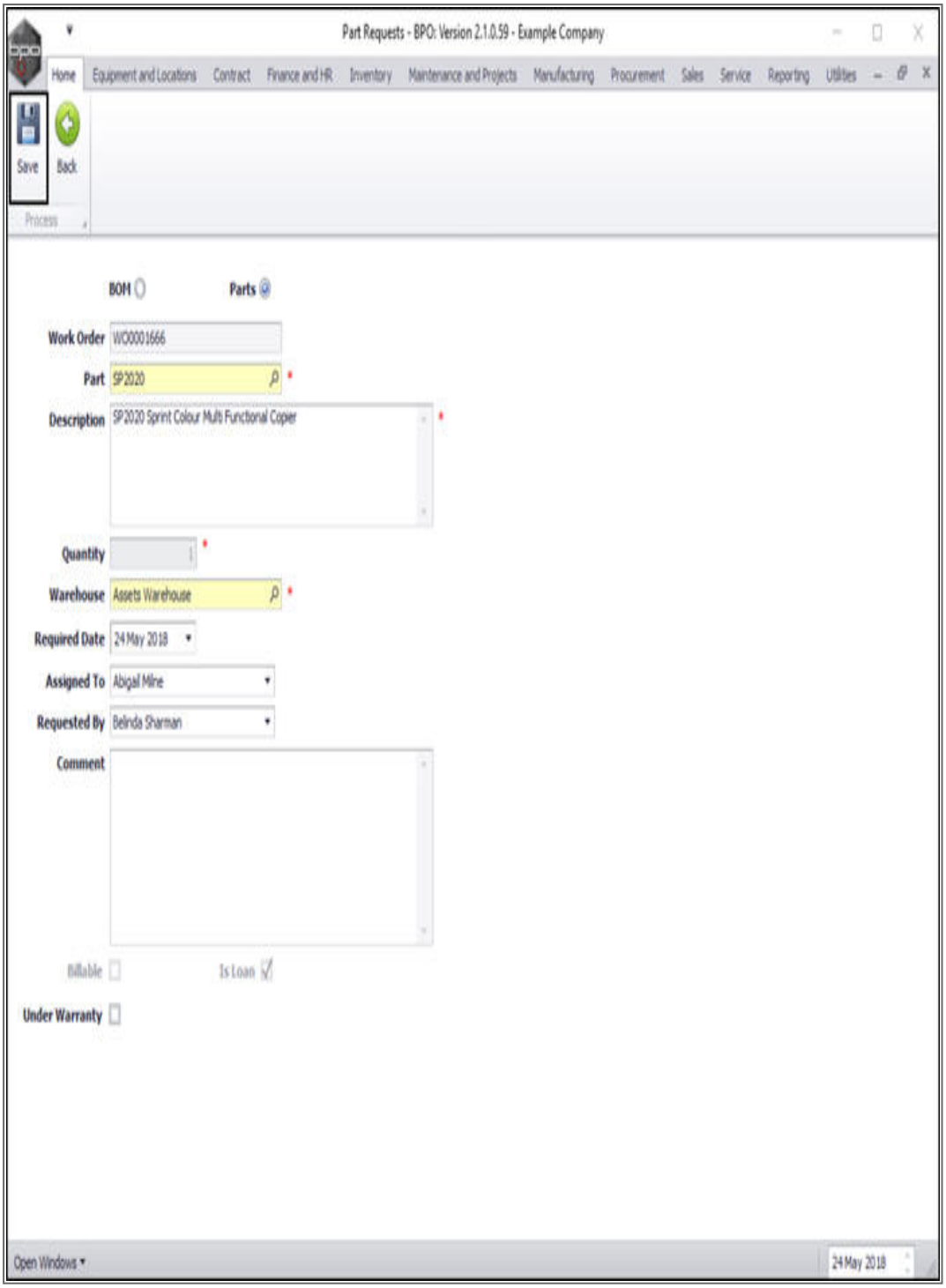

- You will return to the ***Loan Requests for WO Code [ ]*** listing screen.

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- 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***.

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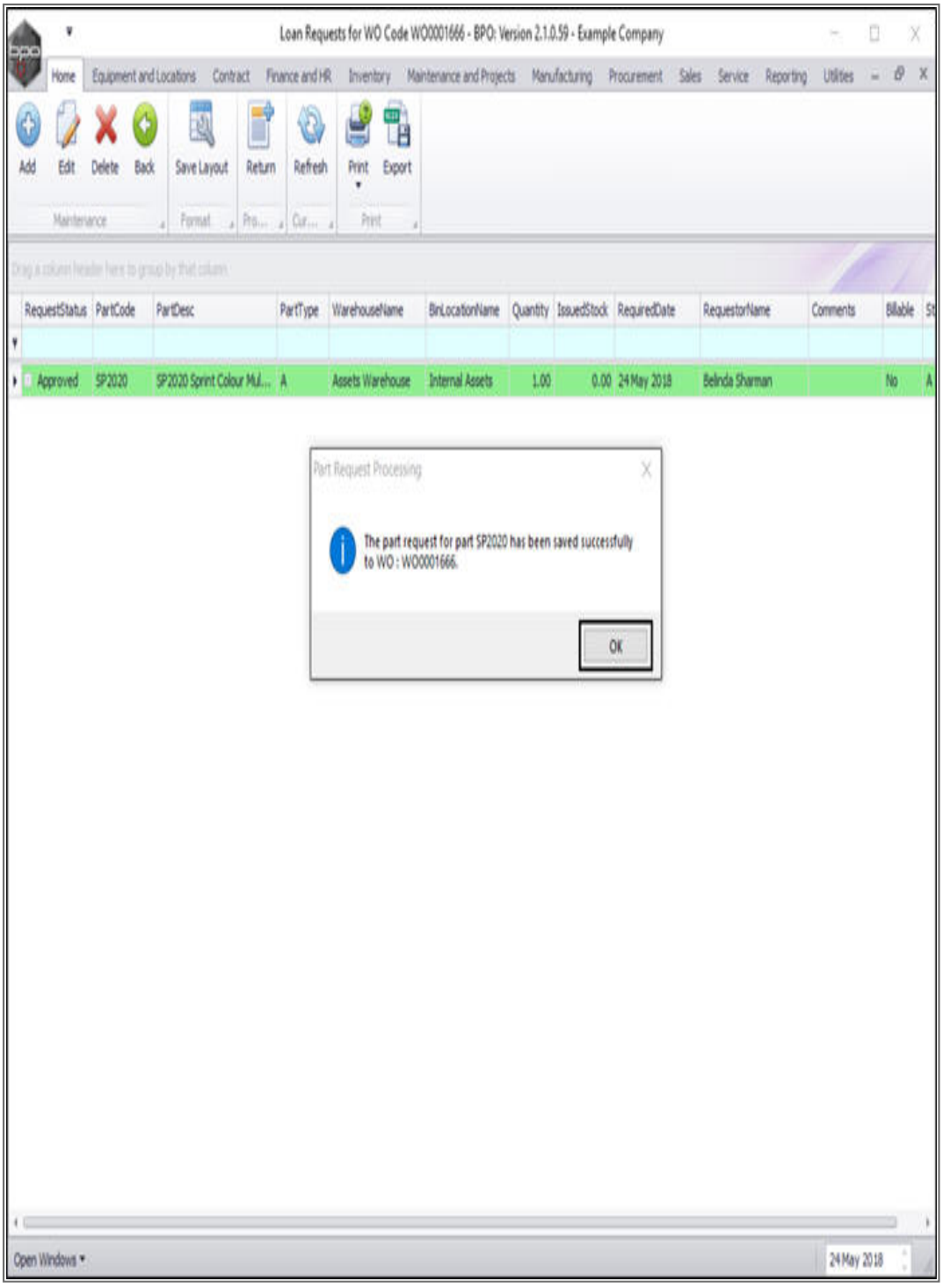

Note: Only once the loan unit request has been approved and issued can the delivery note be printed.

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PRINT DELIVERY NOTE

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

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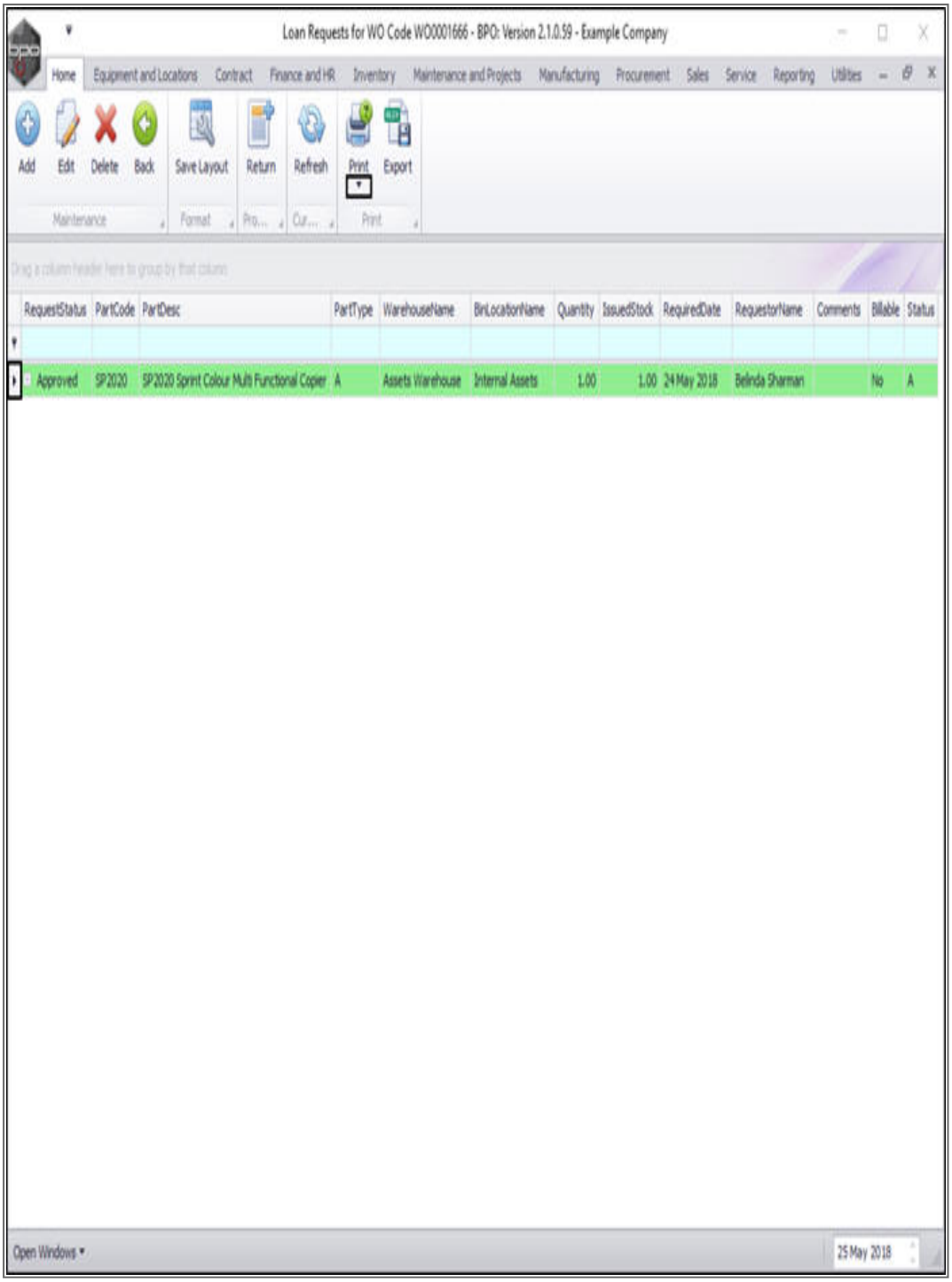

- A ***Print options*** menu will be displayed.
- Click on ***Delivery Note***.

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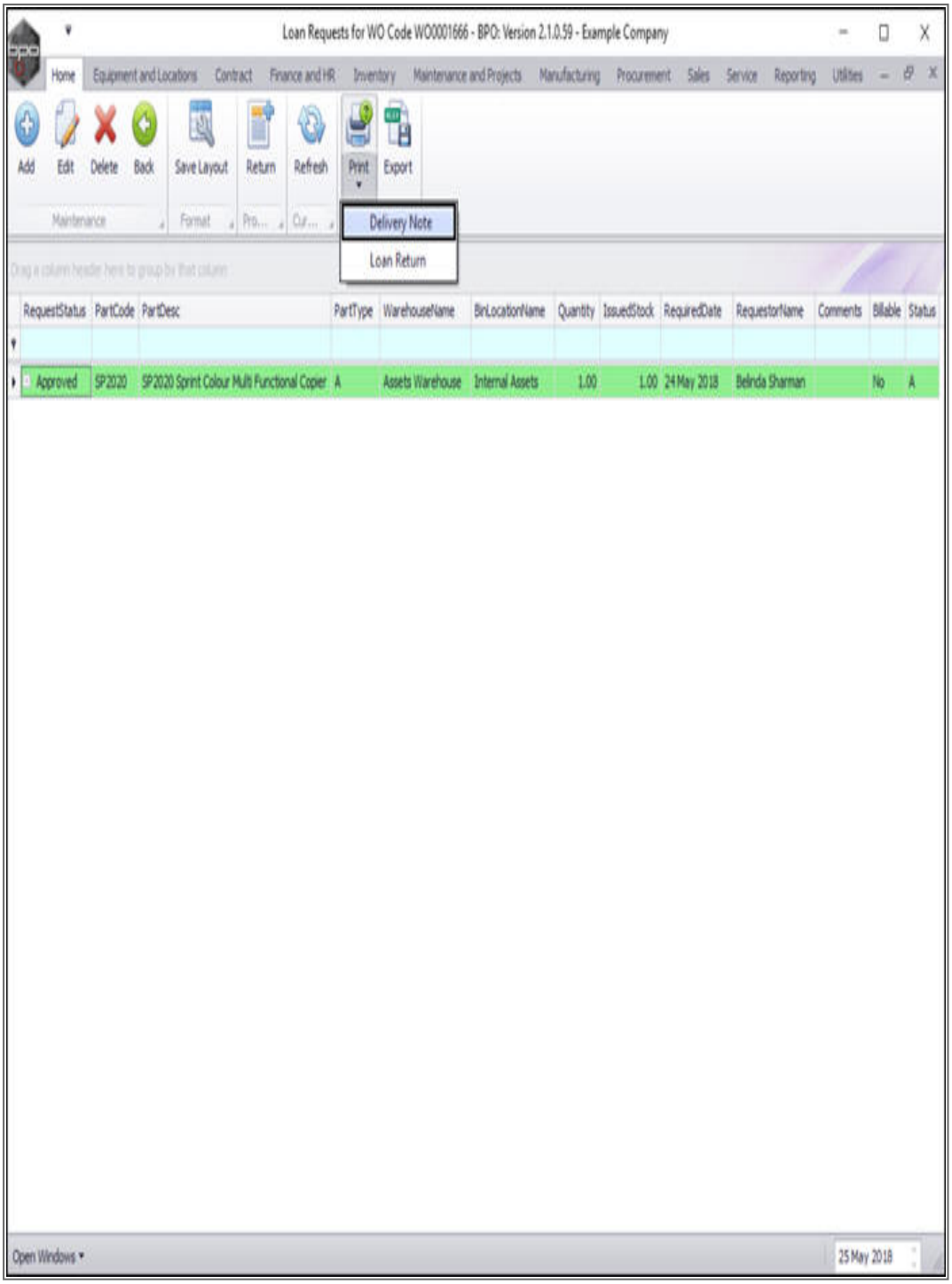

- The ***Loan Unit Delivery Note*** report preview screen will be displayed.

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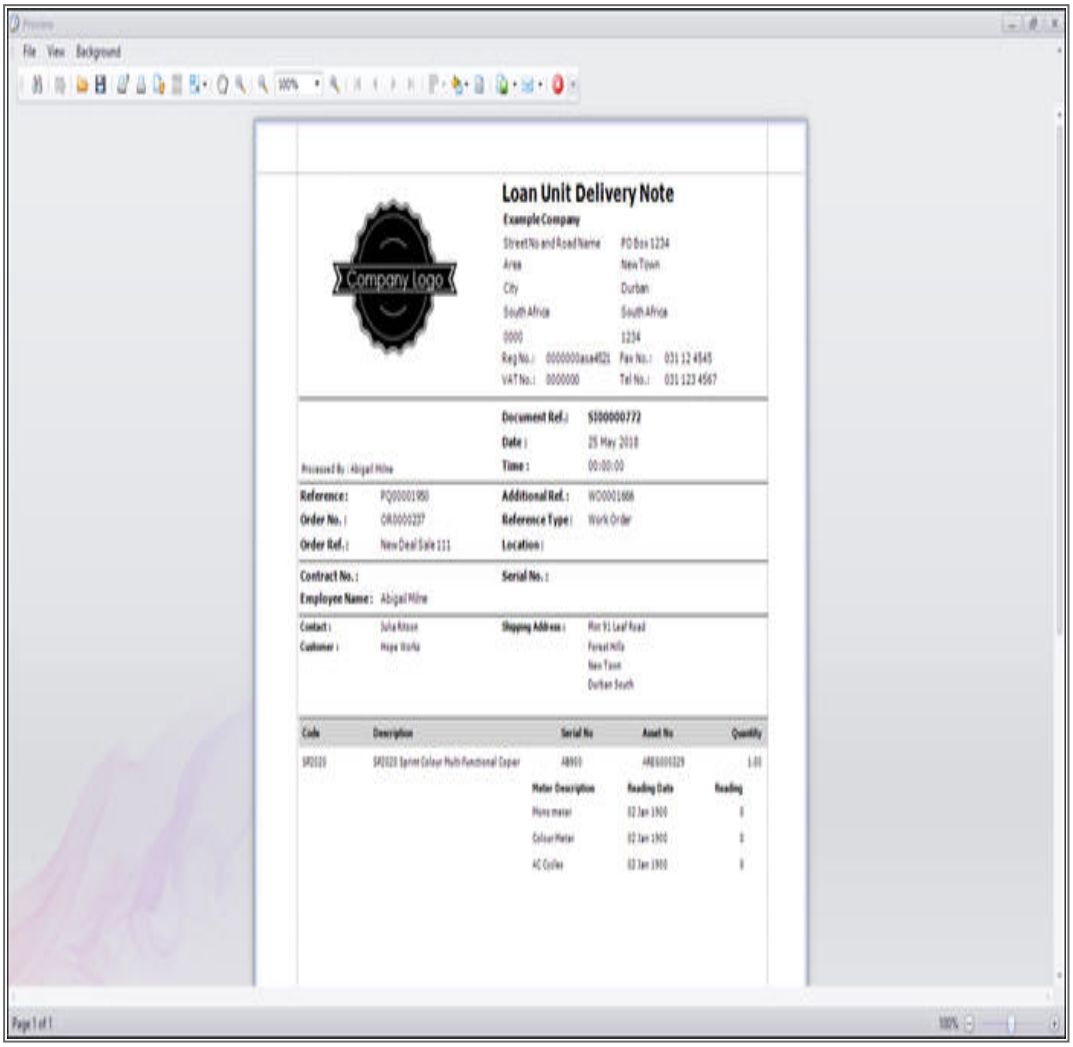
- From here you can ***View***, ***Print***, ***Export*** or ***Email*** the delivery note.

- ***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 .

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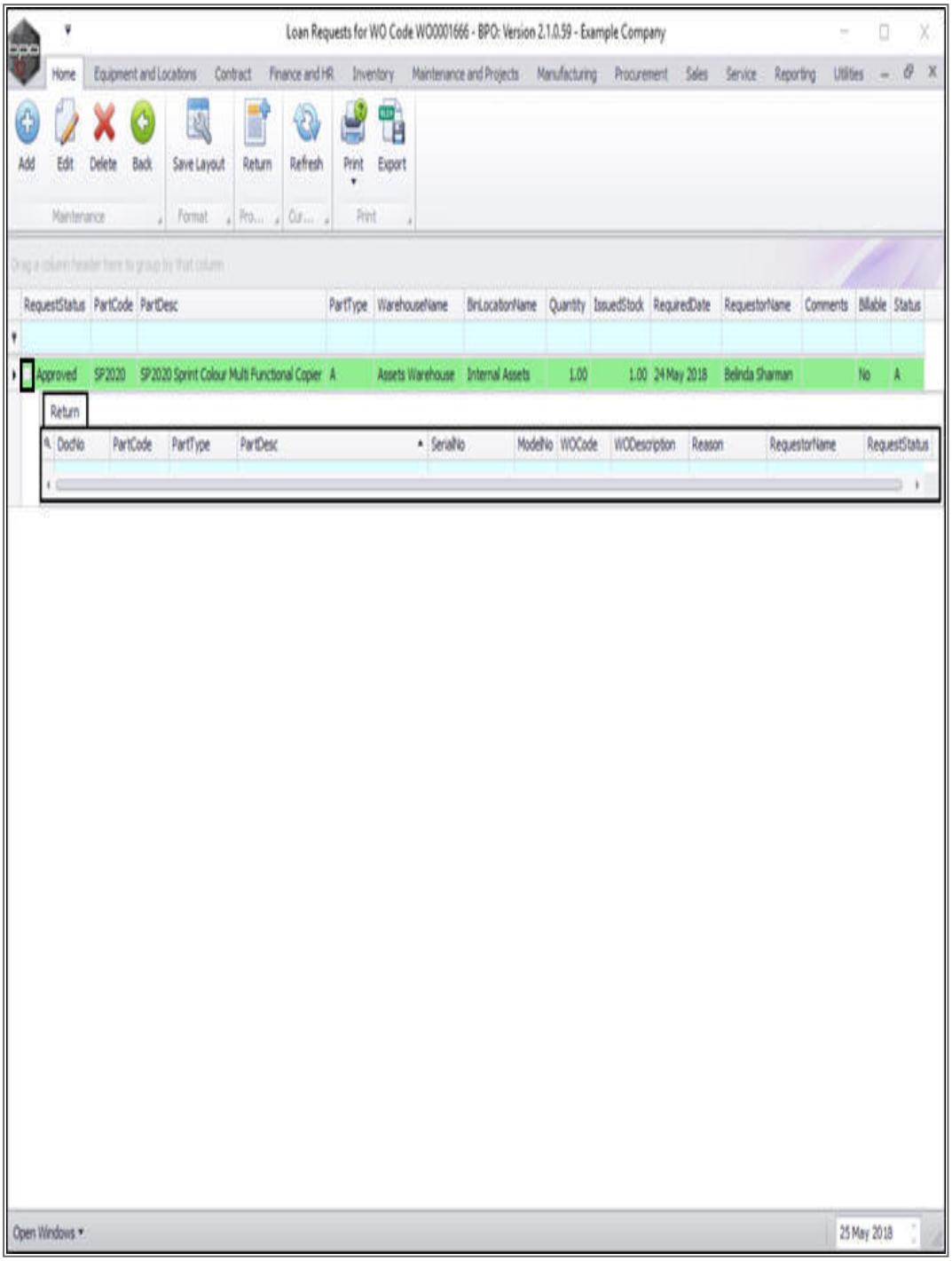
- You will note in this image that this expand button is currently ***'feint'*** this indicates that the frame does not contain any information (in this case, a loan return request) yet.



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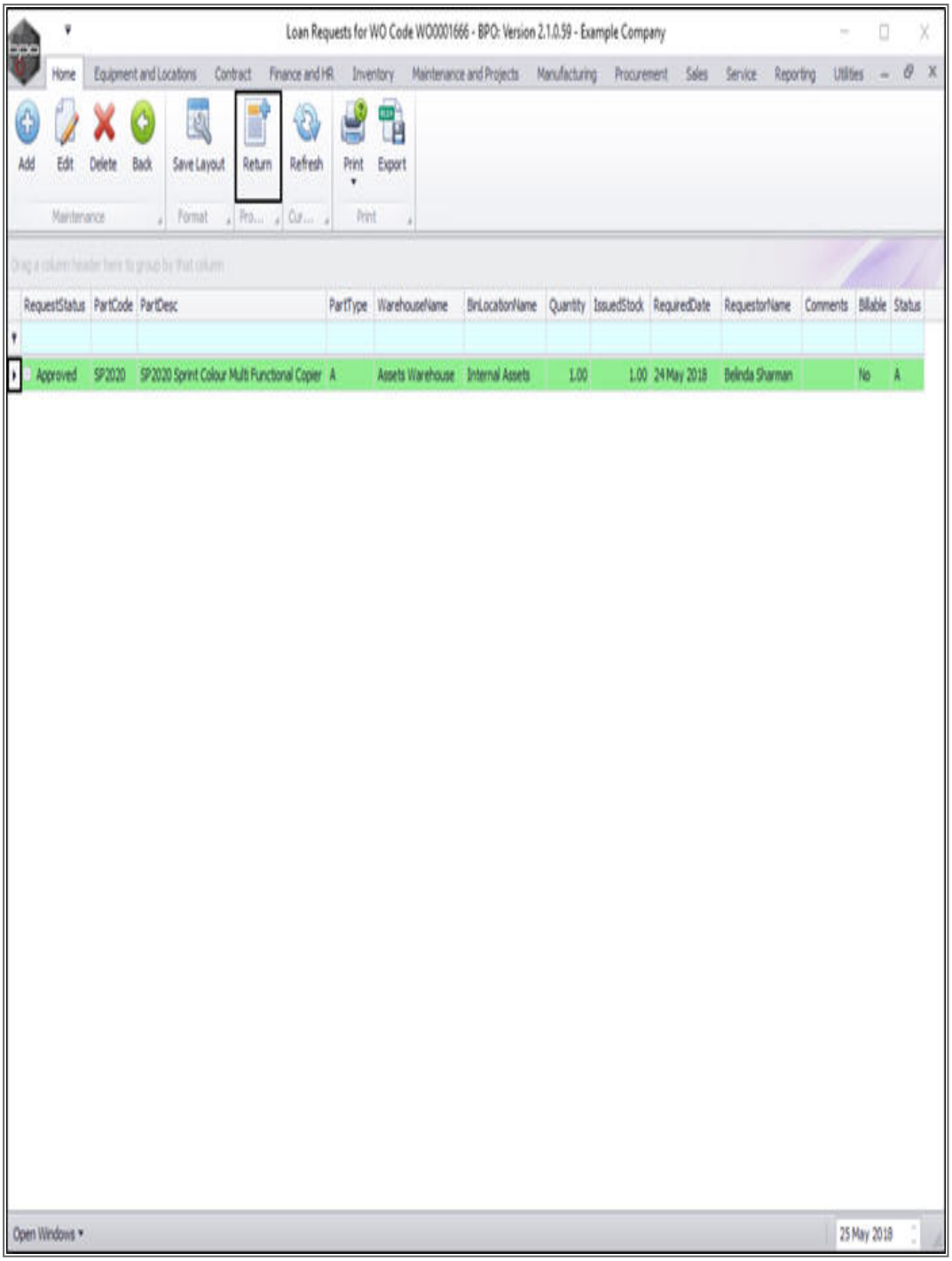
- Click on the ***row selector*** in front of the ***loan unit*** you wish to ***return***.
- Click on ***Return***.



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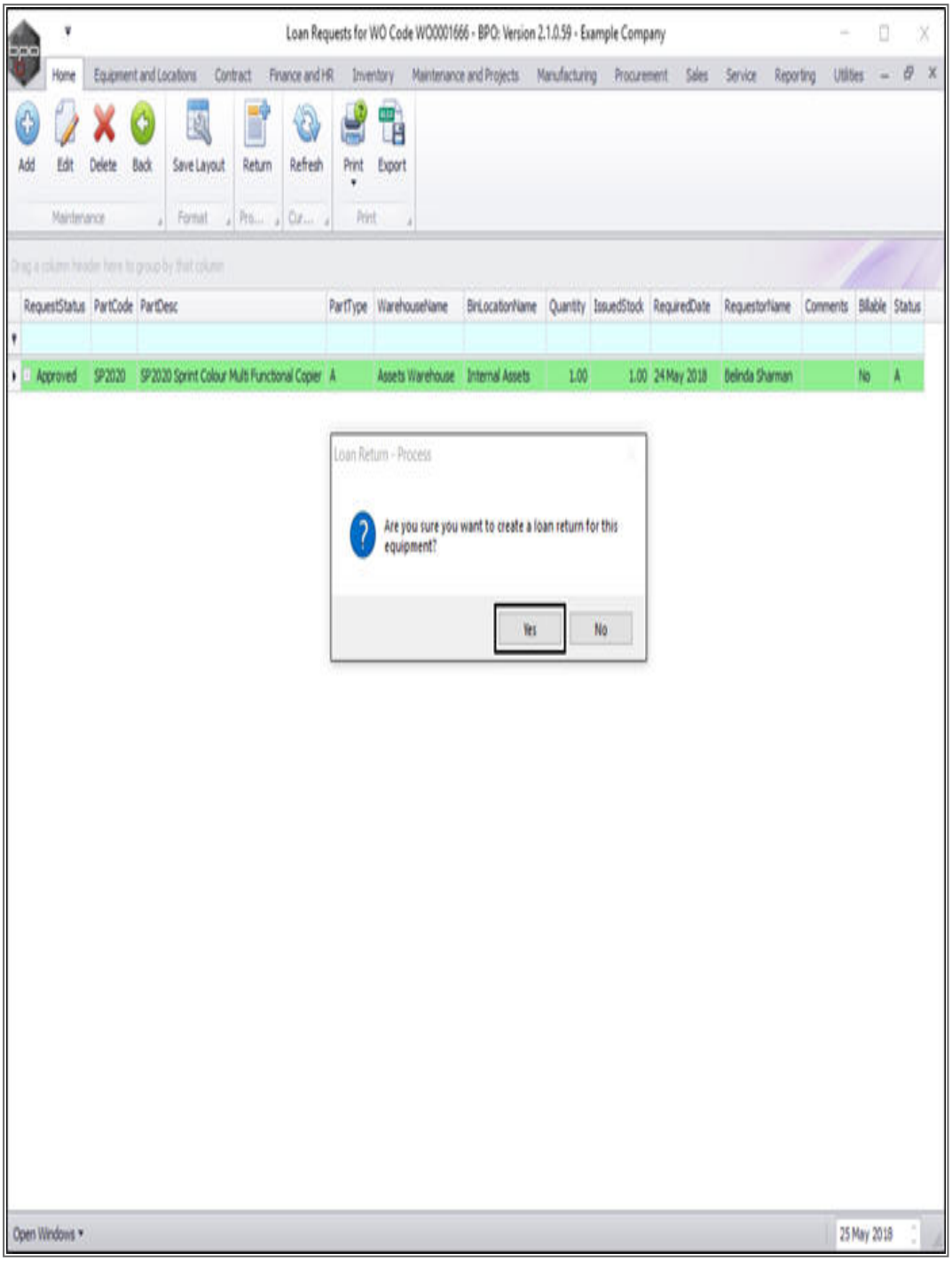
- A ***Loan Return - Process*** message box will pop up asking;
    - ***Are you sure you want to create a loan return for this equipment?***
- Click on ***Yes***.



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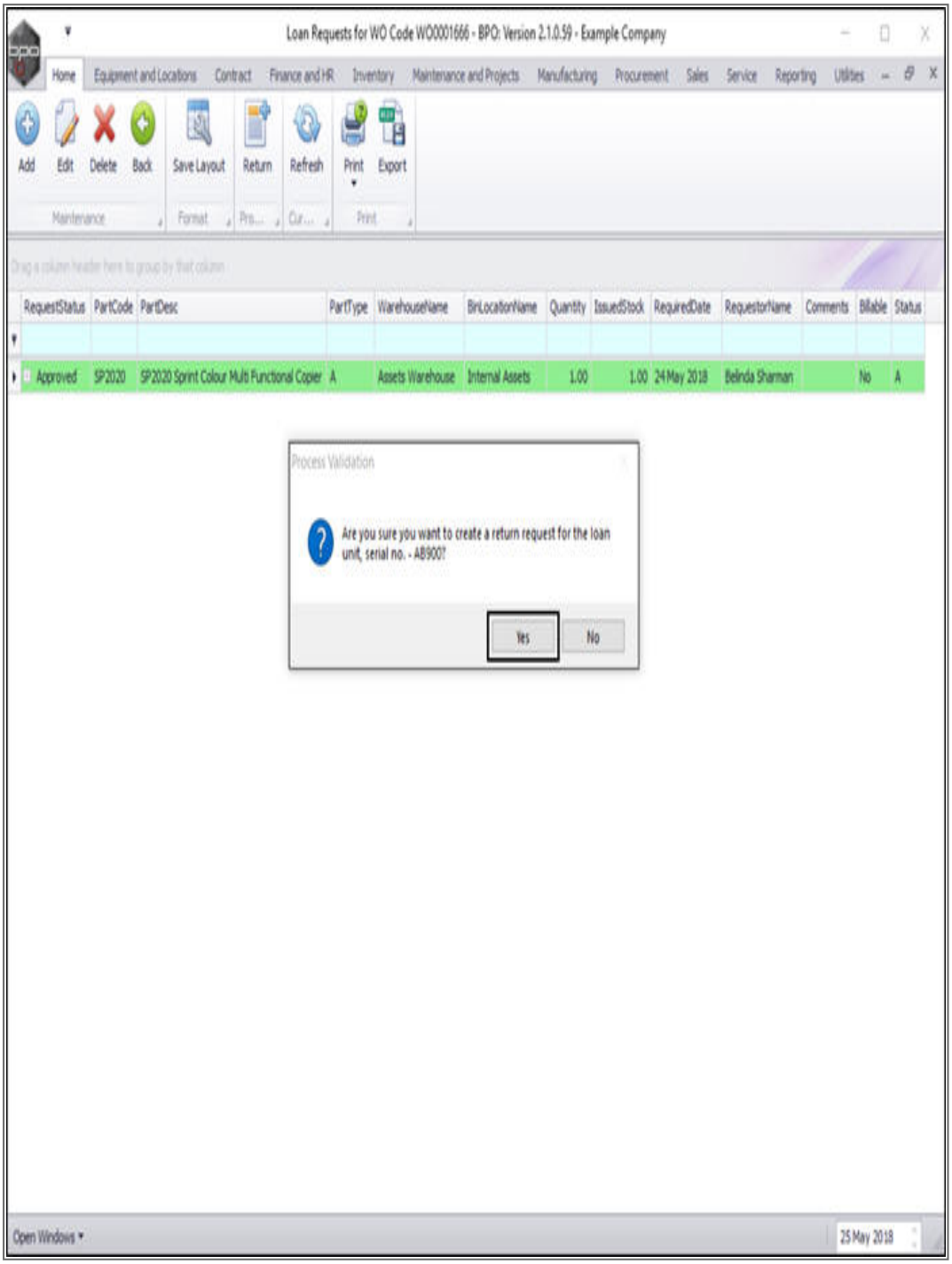
- A ***Process Validation*** message box will pop up asking;
    - ***Are you sure you want to create a return request for the loan unit, serial no.- [ ] ?***
- Click on ***Yes***.



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VIEW LOAN UNIT RETURN REQUEST

- 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.

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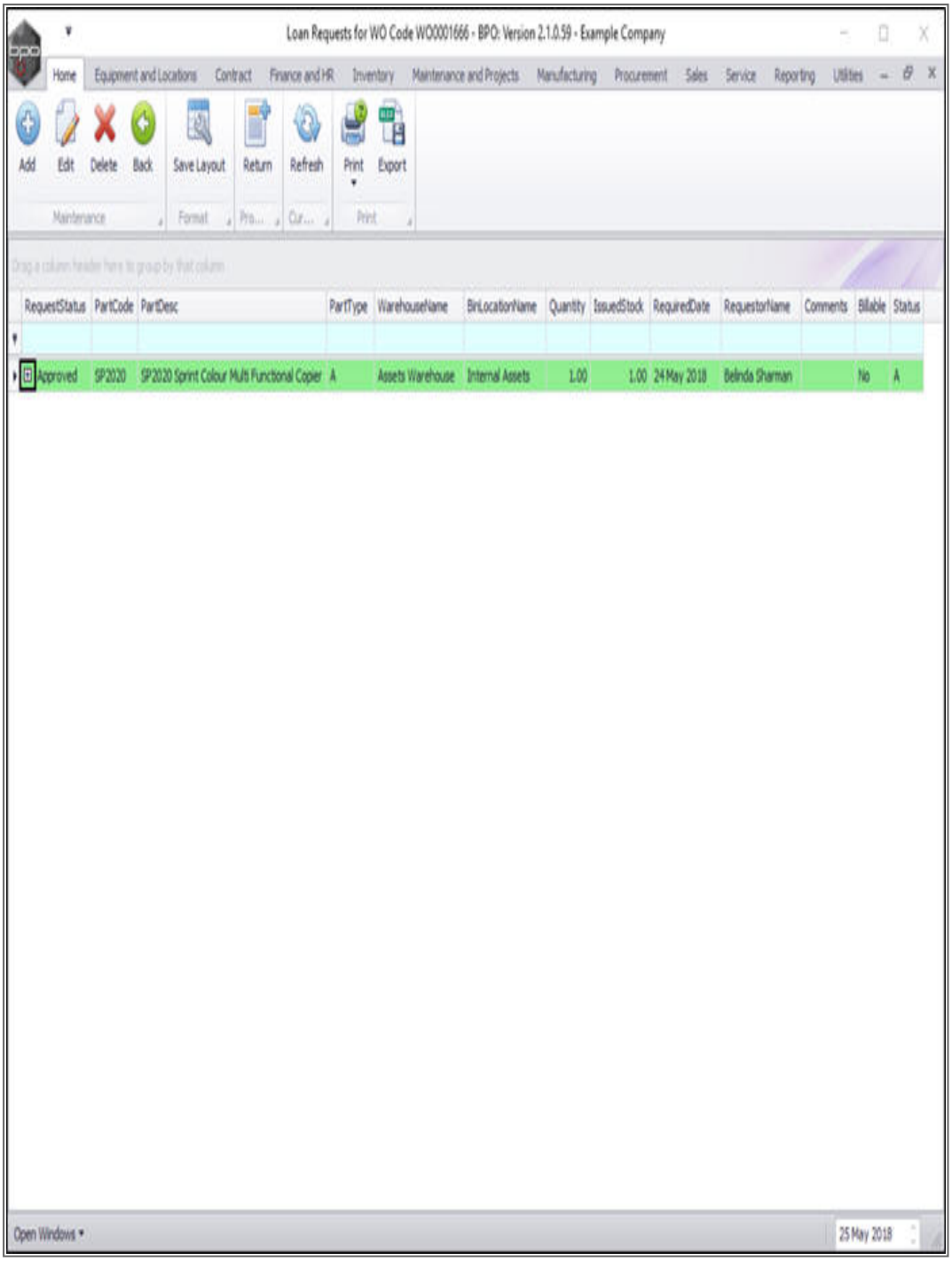

- The loan unit ***Return*** frame will be expanded.
- Now you can view the details of the return request here and you will now be able to ***print*** the ***Loan Return Note***.

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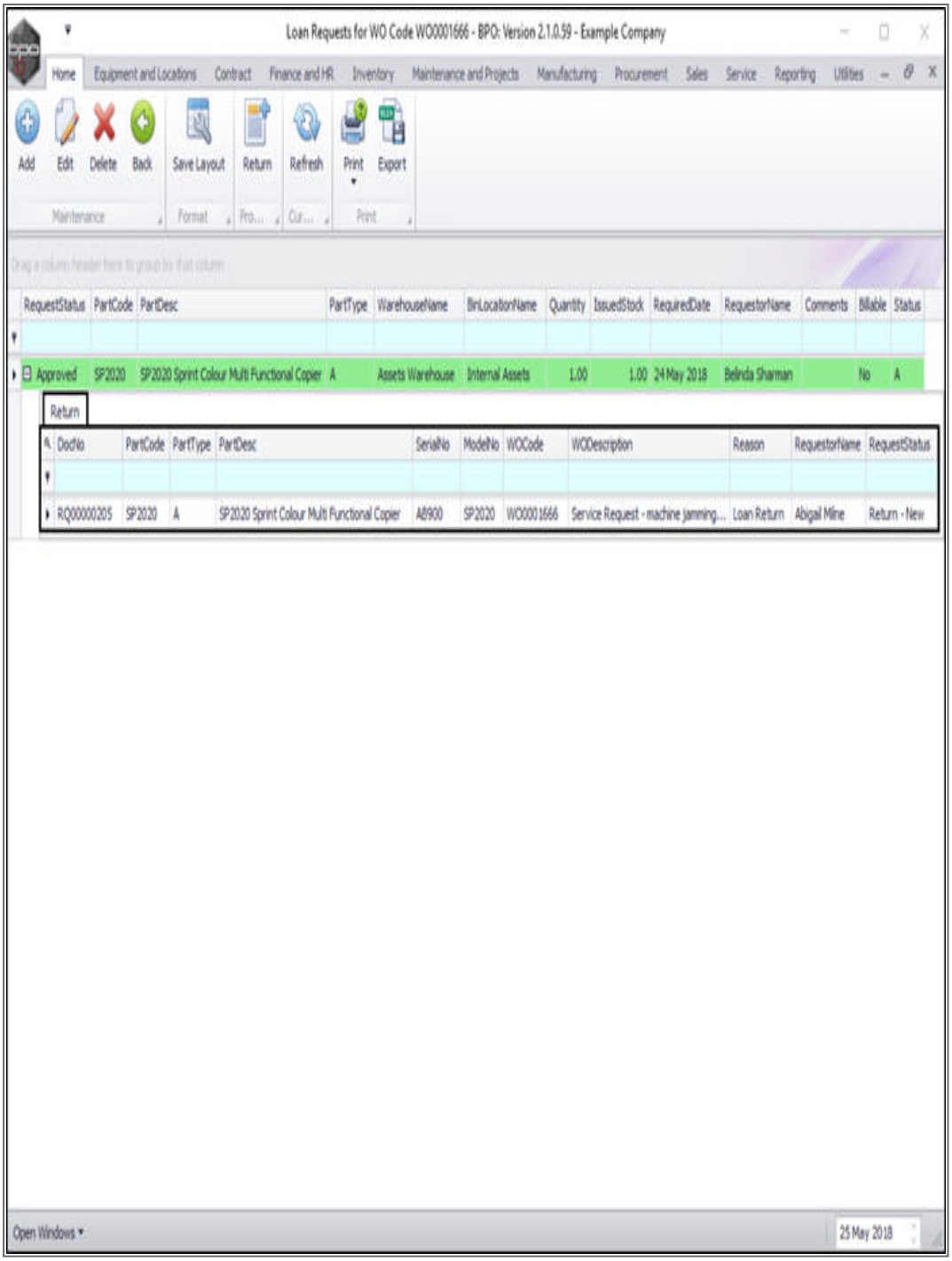

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PRINT LOAN UNIT RETURN NOTE

- 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.

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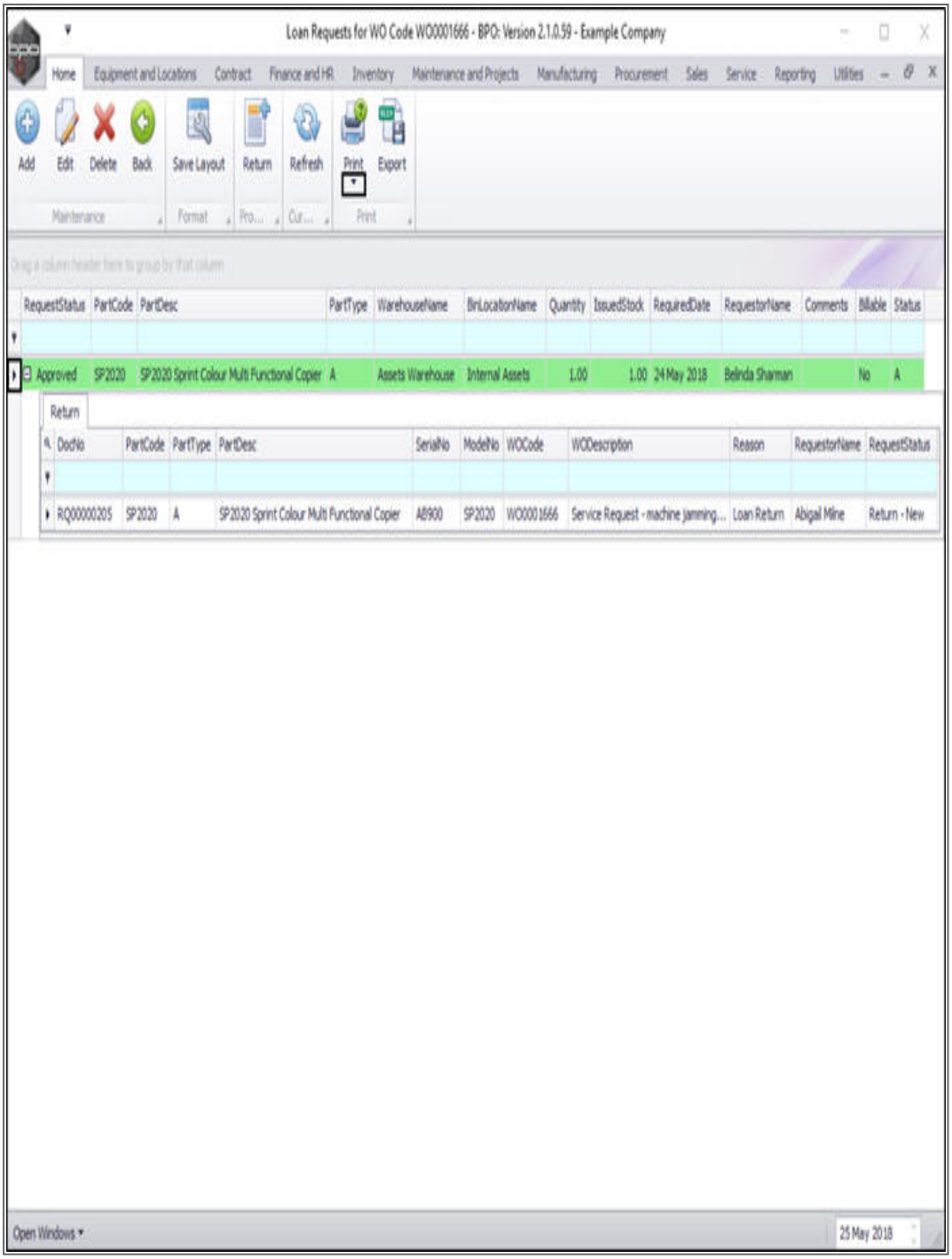

- A ***Print options menu*** will be displayed.
- Click on ***Loan Return***.

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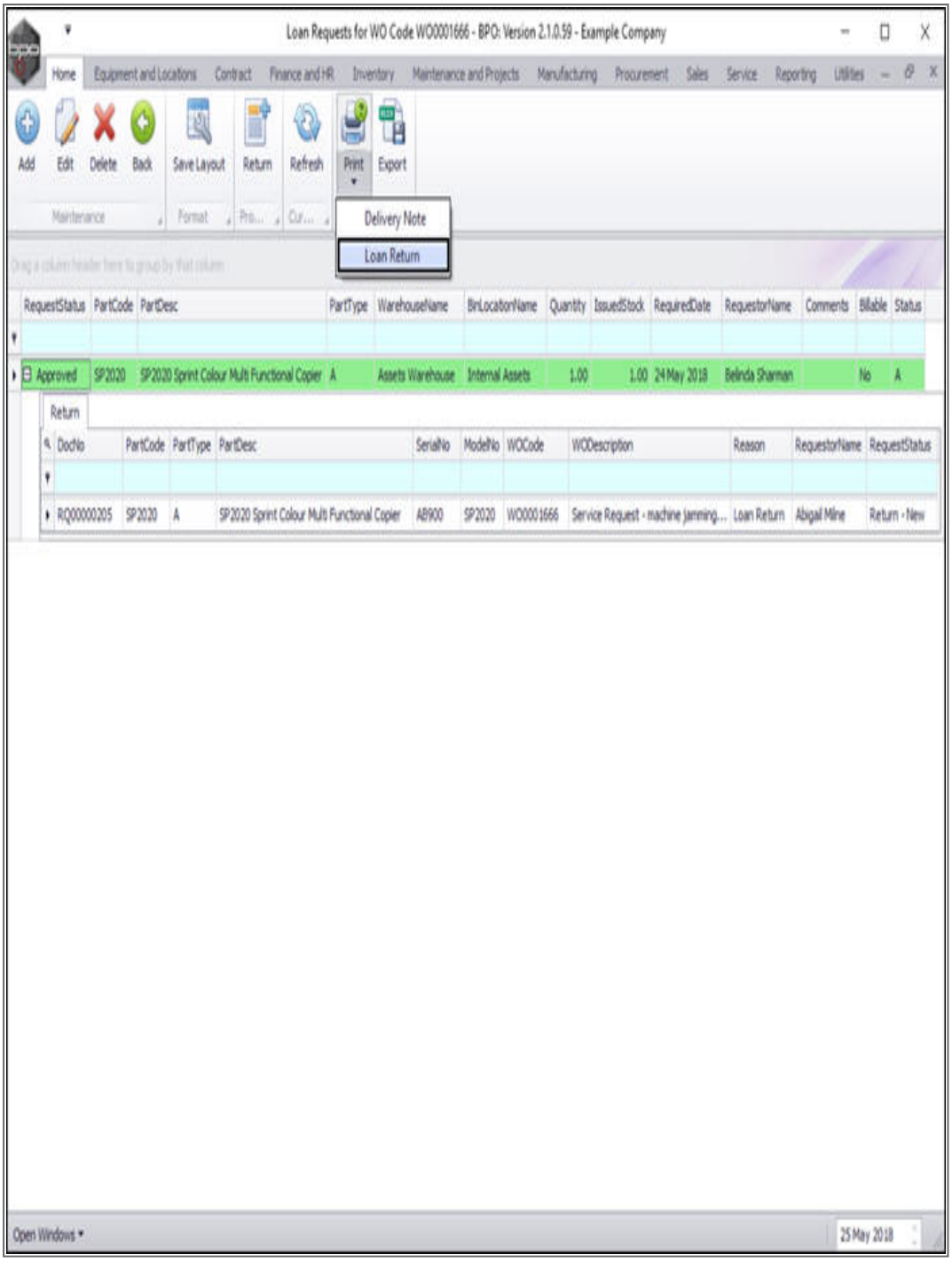

- The ***Loan Unit Return*** report preview screen will be displayed.
- From here you can ***View***, ***Print***, ***Export*** or ***Email*** the document.
- ***Close*** the report preview screen when you are done.

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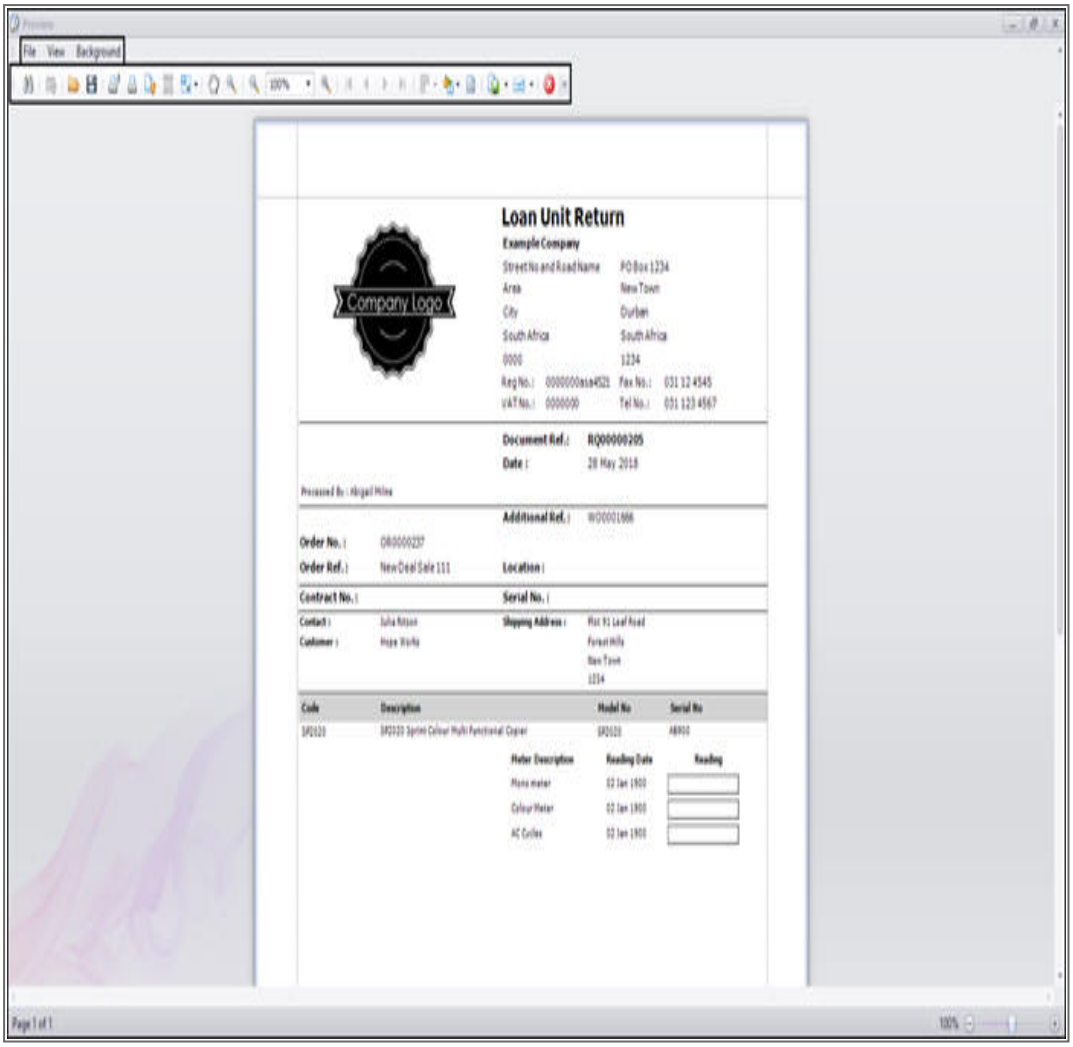

- The ***Loan Unit Return*** document will be taken to the ***client*** on delivery of the repaired machine and collection of the loan unit.
    - **Note:** Update the meter readings before the document is signed off and the loan unit is returned to store.

Related Topics

Issue Loan Unit
Loan Unit Processing

MNU.073.008

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