

CONTRACTS

LOAN ITEM PROCESS

Only use this process where the item will be at a client over an extended period of time. Otherwise just raise a call and [issue a loan unit](#).

Link a loan item to a contract to enable traceability of the loan machine and billing to continue whilst the original item on contract is, for example, in for long-term repairs.

You can set up a Fee Type called 'Loan' to clearly see and manage via the contracts listing, which items are loan units.

The loan unit call will remain open (and cannot be closed) until the loan unit is returned.

ADD A LOAN MACHINE TO A CONTRACT

1. [Raise Call for Collection of Item on Contract for Repair and Delivery of Loan Machine](#)
2. [Print Contract Report](#) (to have a record of item fees / meter charges set up)
3. [Call Loan Unit Process](#)
 - i. Request Loan Unit
 - ii. Loan Unit Meter Reading
 - iii. Issue Loan Unit
 - iv. Print Loan Unit Delivery Note
4. [Link Loan Unit to contract](#)
 - Link 'Loan' fee type (set the Amount to '0' where no fee is charged).

- Include loan unit meter charges for meter history, (set the Unit Charge to '0' where no meters are charged)
5. [Refresh Meter List](#)
 6. Client to sign Loan Unit Delivery Note

REMOVE A LOAN ITEM FROM A CONTRACT

1. [Remove loan unit from Contract](#)
2. [Call Loan Unit Process](#)
 - Raise Loan Unit Return Request
 - Print the Loan Unit Return Note
3. Client to Sign Loan Unit Return Note
4. [Update Loan Unit Meter Reading](#)
5. [Return Item to Store](#)
6. [Refresh Meter List](#)
7. Update and Close Call

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