

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

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**.

Help v2024.5.0.7/1.0 - Pg 1 - Printed: 21/08/2024



- 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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Time	· WO0006239	PR		Rollers need replacing	No		11/11/2021	3 1	No	PR.300004
	WO0006240	SM		WS - Weekly Service	No		16/11/2021	2 1	No	PR.300004
	· WO0006241	SM		WS - Weekly Service	No		16/11/2021	2 1	No	PRJ00004
Services	· WO0006242	SERV		1MMS - 1 Month Machine Service	No		16/11/2021	2 1	No	PR.300004
	· WO0006243	SM		WS - Weekly Service	No		16/11/2021	2 1	No	PR.300004
	4 · WO0006245	SM		WS - Weekly Service	No		23/11/2021	2 1	No	PRJ00004
Third Party Services	· WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 1	No	PR.300004
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		REP	CN0005300	Printer displaying error code	No	Printer displaying error	18/01/2022	3 1	4o	
oans		PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3 1	40	
		IMP	CN0005302	New machine implementation. Installation	No	New machine implemen	24/01/2022	1 1	40	
	→ WO0006257	NDS	CN0005274	PROJ406OR002	No	PROJ406OR002	19/01/2022	2 1	40	
Swap Outs	· WO0006258	SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2 1	40	
	· WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2 1	/es	
	· WO0006260	REP	CN0005304	Loan unit required while main unit is being	No	Loan unit required whil	15/03/2022	3 1	ło	
Meters										

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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- 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.



Work Orders - Loans

	→ Loan Requests for W0 Code W	/00006250 - BPO: Ve	rsion 2.5.0.8 - Exa	mple Company v2.5	.0.8			
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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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		Loan Request	sure you want to edit this lo 250?	aan request PQ000055:	× 57 on WO				
		Loan Request	sure you want to edit this lo 250?	yes	× 57 on WO				



- 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.

⇔ v Home	Equipment / Loo	1 cations Con	bract Fin	a Requests	for WO Code V	WO0000217 Maintenance	- BPO: Version 2.5.0.8 / Projects Manufact	- Example Company turing Procurement	v2.5.0.8 Sales Servi	ce Reporting	Utilitie	s –	o x e x
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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.



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- 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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			Process Validation	n L u sure you want r2143?	6 to create a re	turn request for the lo	× an unit, serial					
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8. Note that the expand button is visible indicating that the return request has been done.

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Approved 2020-938 Staple Unit A Assets Warehouse Internal Assets 1.00 1.00 15/03/2022	Approved - Item DM100200 Colour Copier	A	Assets Warehouse	Internal Assets	1.00		0.00 15/03/2022
	Approved 2020-998 Staple Unit	Α	Assets Warehouse	Internal Assets	1.00		1.00 15/03/2022
Complete States 2 Units 2000 Units 2000 Units 2000 Example Company 2000					150/2002		,

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**.



			Loan R	lequests for	WO Code W	/00006260 -	BPO: Version 2.5.0.8	8 - Example Company	v2.5.0.8				x
Home E	quipment / Loc	ations Con	ntract Finan	ice / HR In	iventory	Maintenance /	Projects Manufac	turing Procurement	Sales Serv	ice Reporting	Utilitie	s _ 2	×
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Approved	2020-998	Staple Unit				A	Assets Warehouse	Internal Assets	1.0	0	1.00	15/03/2022	
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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**.



	1		-> Loan Reques	sts for WO Code V	00006260	- BPO: Version 2.5.0.8	- Example Company	v2.5.0.8				
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Open Windows 🕶							User : JulandaK	15/03/2022	Version : 2.5.0.8	Examp	le Company v2.	5.0.8
												11.

- 5. The Loan Unit Delivery Note 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 done.



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	5	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Loan Unit Example Compar	Delivery	Note				
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			Document Ref.:	SI0000966			-		
			Date :	15 Mar 2022					
	Processed By : B	anca Du Toit	Time :	13:57:24					
	Reference:	PQ00005556	Additional Ref. :	WO0006260					
	Order No. :		Reference Type:	Work Order					
	order Kei.		Location .				-		0
	Contract No.:	CO000006	Serial No. :	1912-102035					
	Contact :	Angie Smith	Shinning Address	674 Nightwich Ave			-		
	Customer :	Office Supplies Unlimited	Shipping Address i	Forest Hills					
				1234					
	Code	Description	Serial	No As	set No	Quantity			
	2020-998	Staple Unit	dr214	3 AF	EG000150	1.00			
	Condition of Go	ods :							
	Comments :								

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 meter 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.



\$ *		0	-> Loan Request	s for WO Code V	VO0006260 -	BPO: Version 2.5.0.8	- Example Company v	2.5.0.8				
Home Ed	quipment / Loc	ations Contra	act Finance / HR	Inventory	Maintenance	/ Projects Manufact	turing Procurement	Sales Servic	e Reporting	Utilitie	:s —	8 ×
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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 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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			Date :	15 Mar 2022			
	Processed By : Ju	ilanda Kessler	Additional Def .	W00006260		_	
	Order No. :		Additional Ref. :	W00006260			
	Order Ref.:		Location :				
	Contract No. :	CO000006	Serial No. :				
	Contact :	Angie Smith Office Supplies Unlimited	Shipping Address :	674 Nightwish Ave			
	customer						
	Code	Description		1234 Model No	Serial No.	_	
	2020-998	Staple Unit		Hoderito	dr2143		
4							
Page 1 of 1						100% Θ	•

Related Topics

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

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