

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

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.

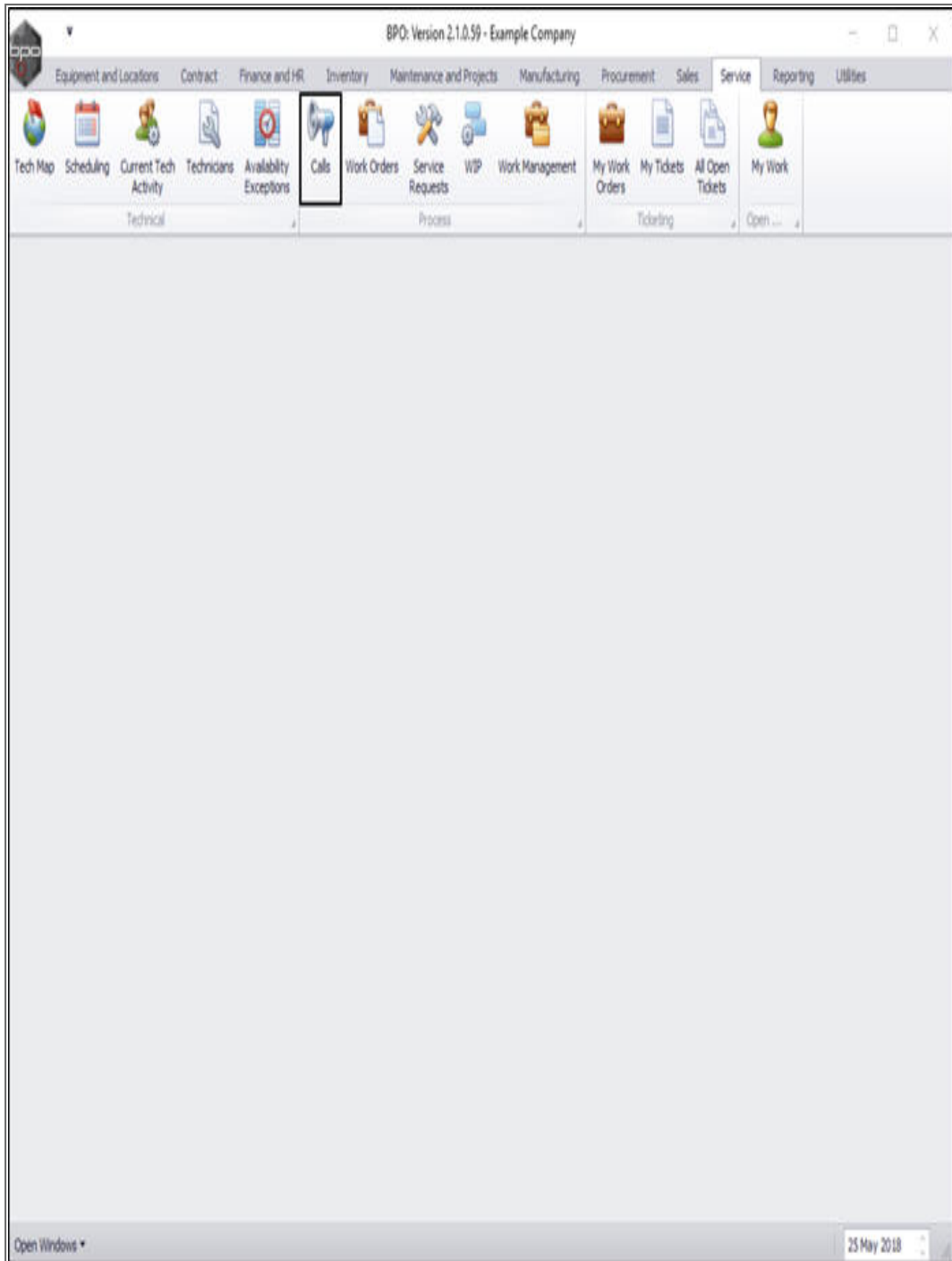
The **Loan Unit Request** will be raised against the **Repair Call**.

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).

Ribbon Access: Service > Calls



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.

The screenshot shows a software interface titled "Call Listing - BPO: Version 2.1.0.59 - Example Company". The interface includes a menu bar, a toolbar with various icons, and a main data table. On the left, there is a filter pane with a tree view showing sites and their statuses. The "Durban" site is selected, and under it, the "New" status is also selected. The main table displays a list of calls with columns for CallReference, CallDate, CallState, Technician, CallTime, Description, CallType, CallTypeDesc, ErrorCode, and ErrorCodeDesc. The table shows 19 calls in total, with the first few rows highlighted in different colors (green, yellow, red, cyan, magenta). The status "New" is selected in the filter pane, and the site "Durban" is also selected. The count at the bottom of the table is 19.

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 copi...	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

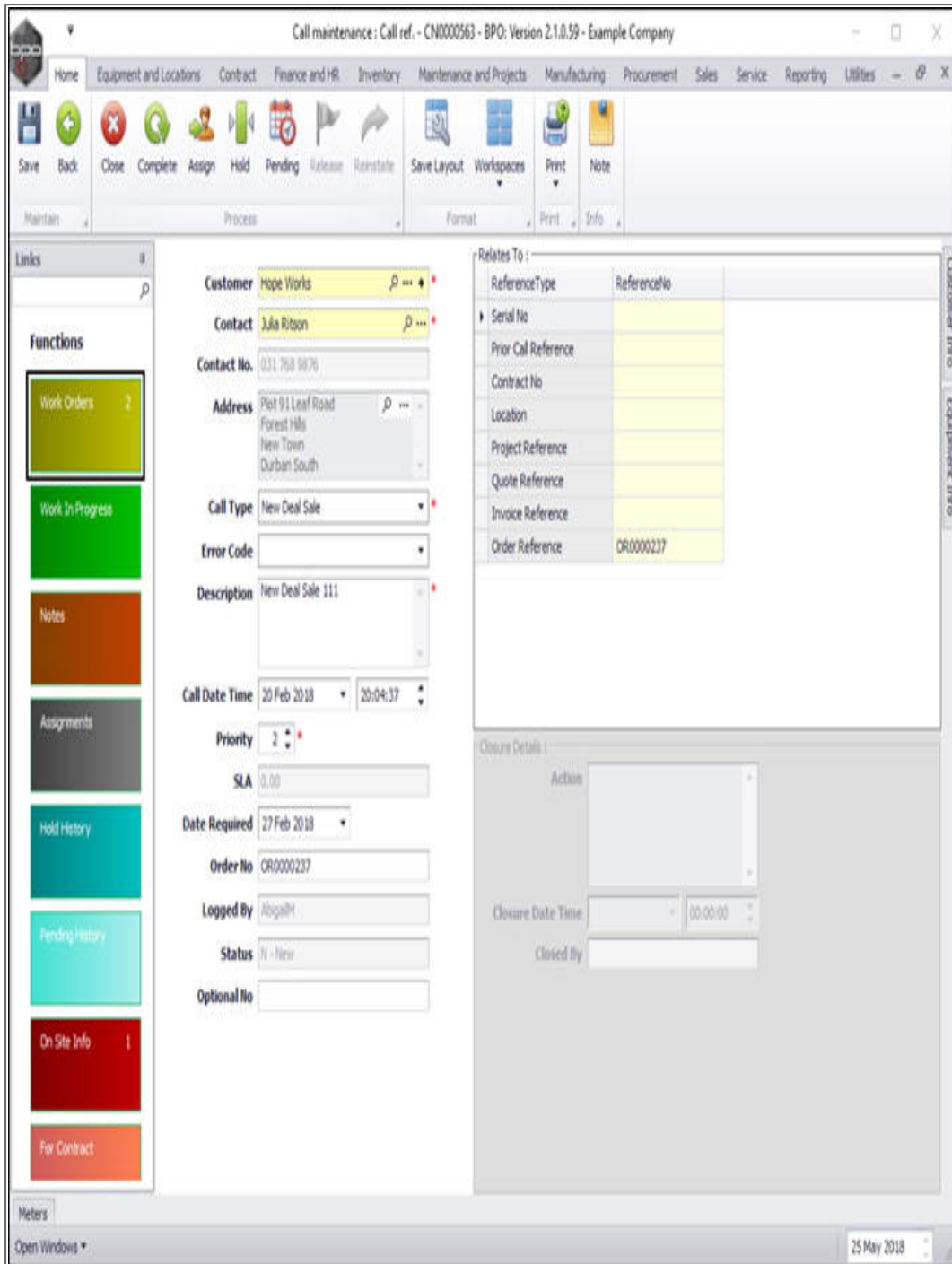
REQUEST LOAN UNIT ISSUE

- 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	ndr10	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.

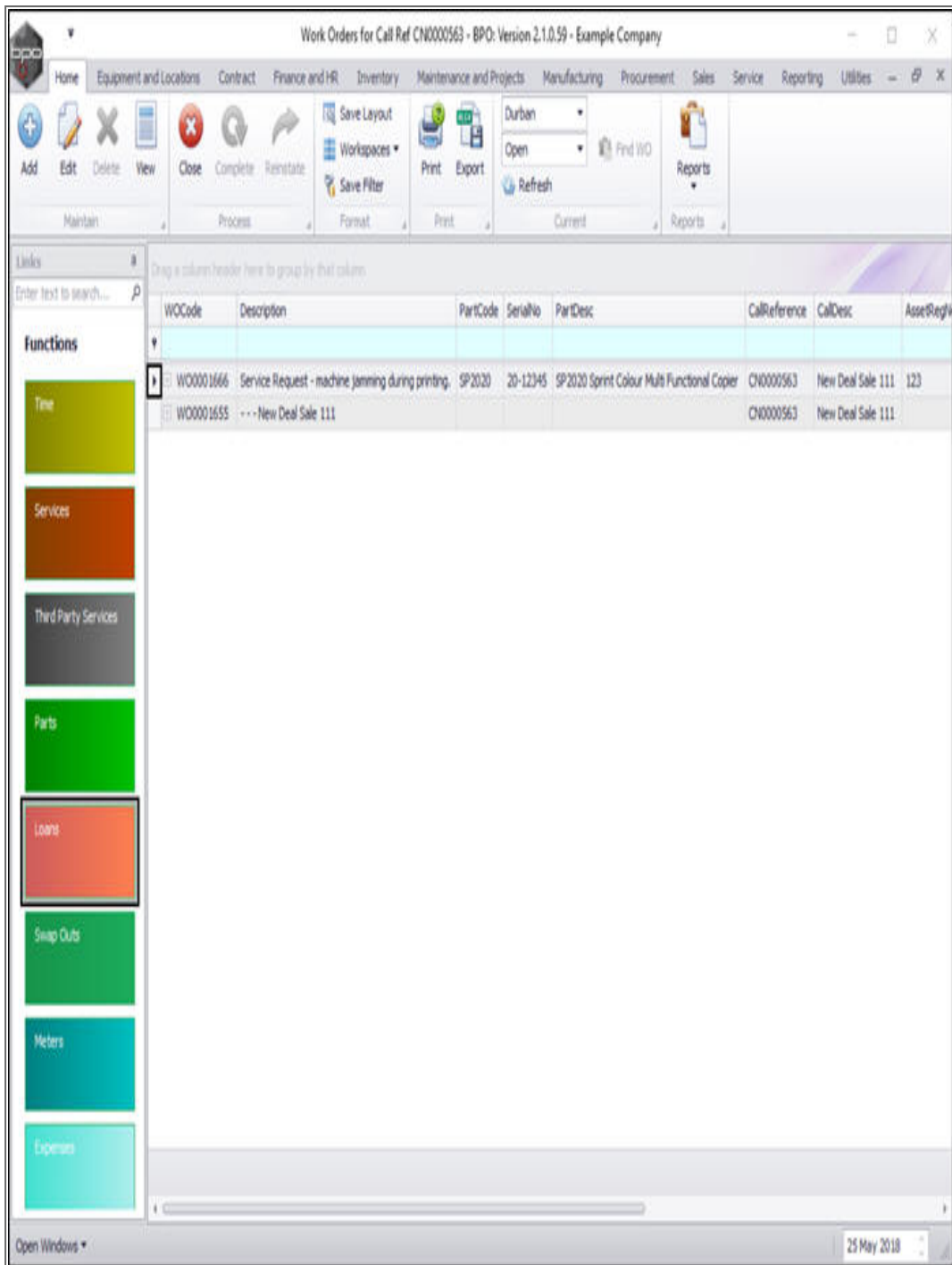
- Click on the **Work Orders** tile.



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

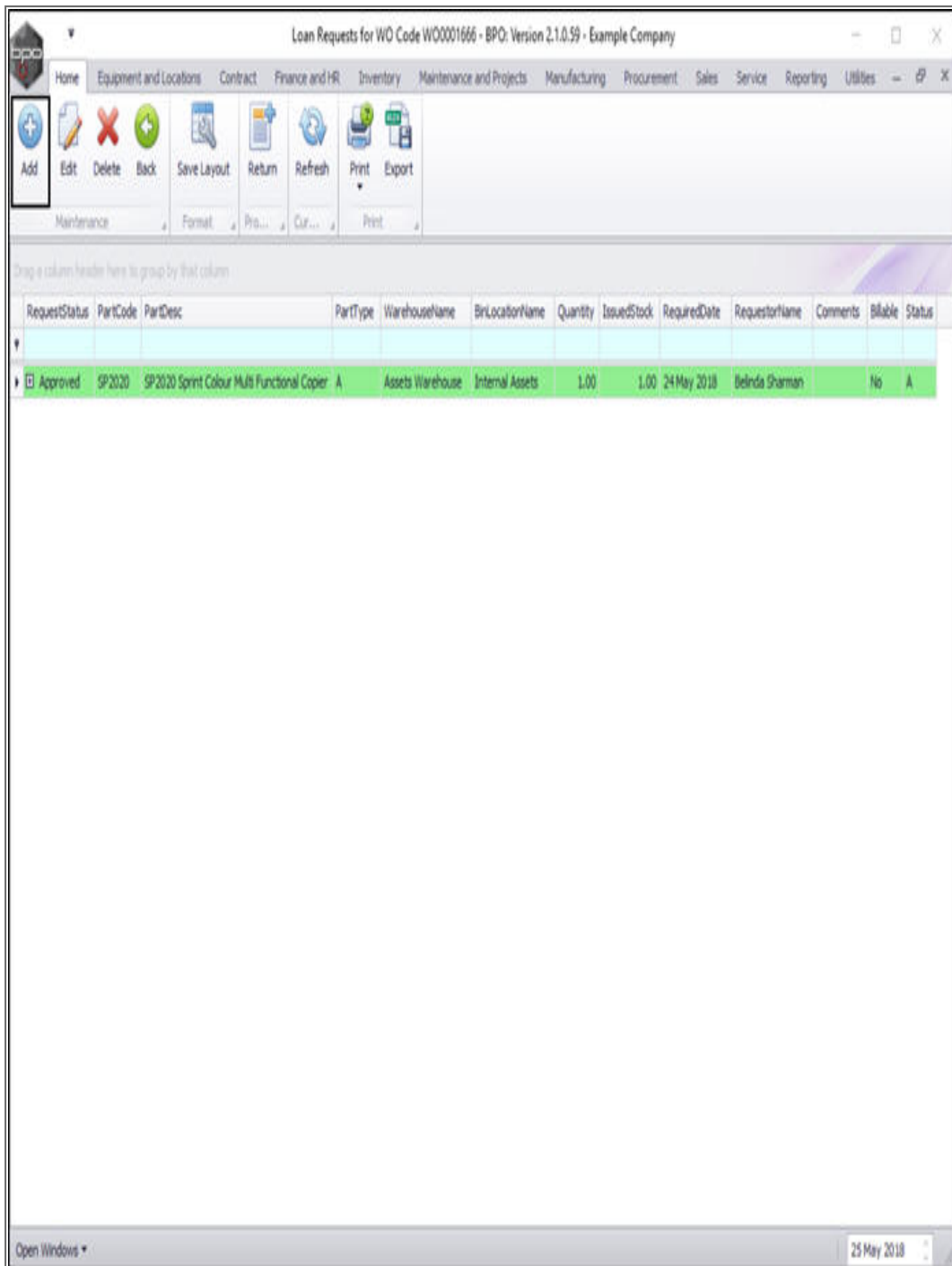
- Click on the **row selector** in front of the **work order** that you wish to **link** a loan unit to.

- Click on the **Loans** tile.



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

- Click on **Add**.



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 Mire

Requested By Belinda Sherman

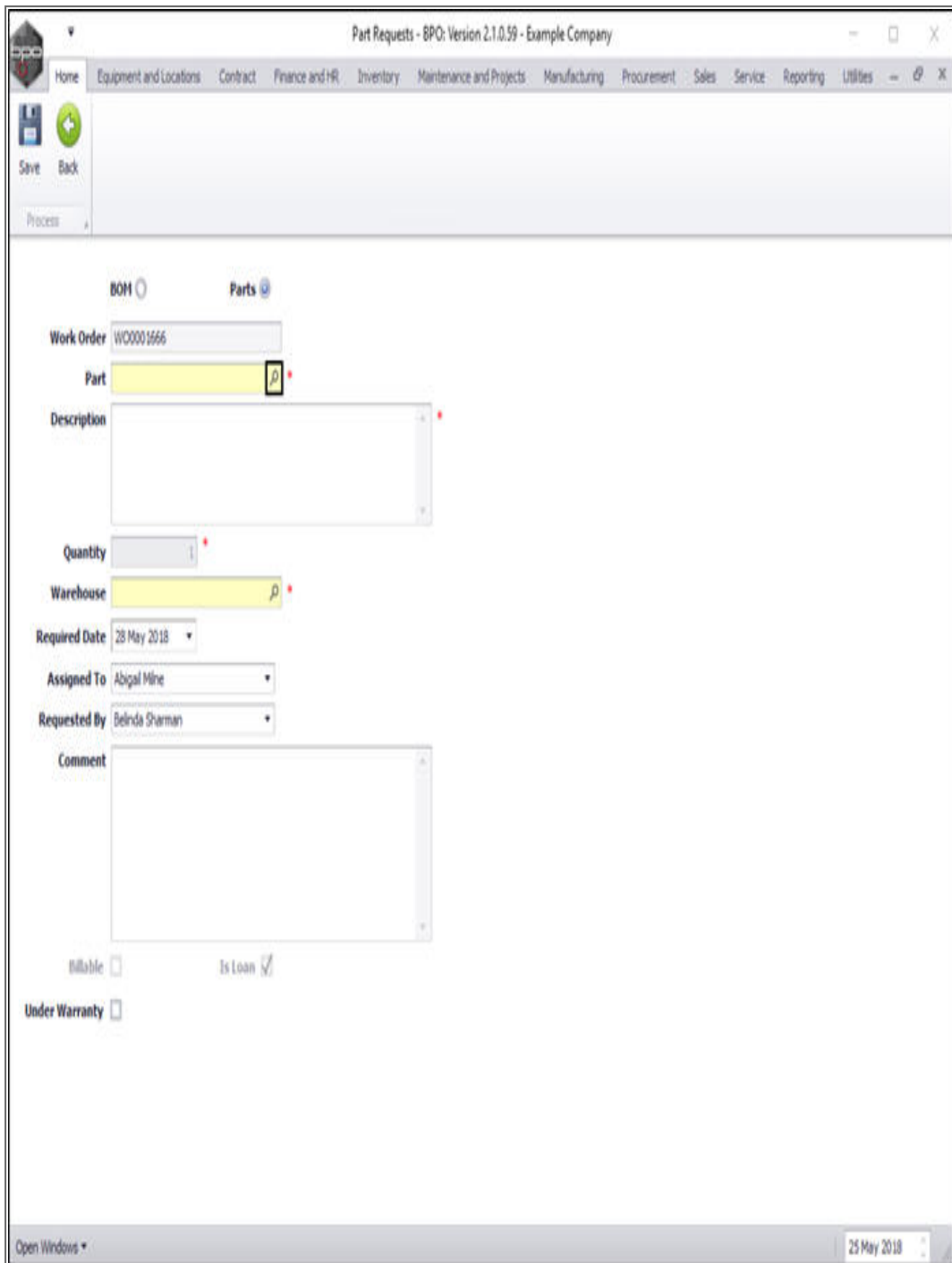
Comment

Billable Is Loan

Under Warranty

Open Windows 25 May 2018

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



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**.

The screenshot shows a software window titled 'Part Requests - BPO: Version 2.1.0.59 - Example Company'. The main window has a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar are 'Save' and 'Back' buttons, and a 'Process' dropdown. The main content area is divided into 'BOM' and 'Parts' sections. The 'Parts' section is active, showing a form with fields for Work Order (W00001666), Part (empty), Description (empty), Quantity (1), Warehouse (empty), Required Date (20 May 2018), Assigned To (Abigail Mine), Requested By (Belinda Sharman), and Comment (empty). There are checkboxes for 'Billable', 'Is Loan', and 'Under Warranty'. An 'Open Windows' button is at the bottom left, and the date '25 May 2018' is at the bottom right.

Overlaid on the main window is a dialog box titled 'Select a part for this work order'. It has a 'Home' button and three icons: a green checkmark, a green plus sign, and a blue document icon. Below these are 'Ok', 'Back', and 'Save Layout' buttons. A 'Process' dropdown and a 'Format' dropdown are also present. The dialog box contains a table with the following data:

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-1227FB	Kruger ZN Fax Machine	15.00	A	A	VAT	Hardware	ZN122	
NMACH	New Machine	15.00	A	A	VAT	Hardware		
PCH0N001	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		
KBAN	Scout Pulse Printer	15.00	A	A	VAT	Hardware		

- **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 W0001666

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

Open Windows 25 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 | 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

Open Windows | 25 May 2018

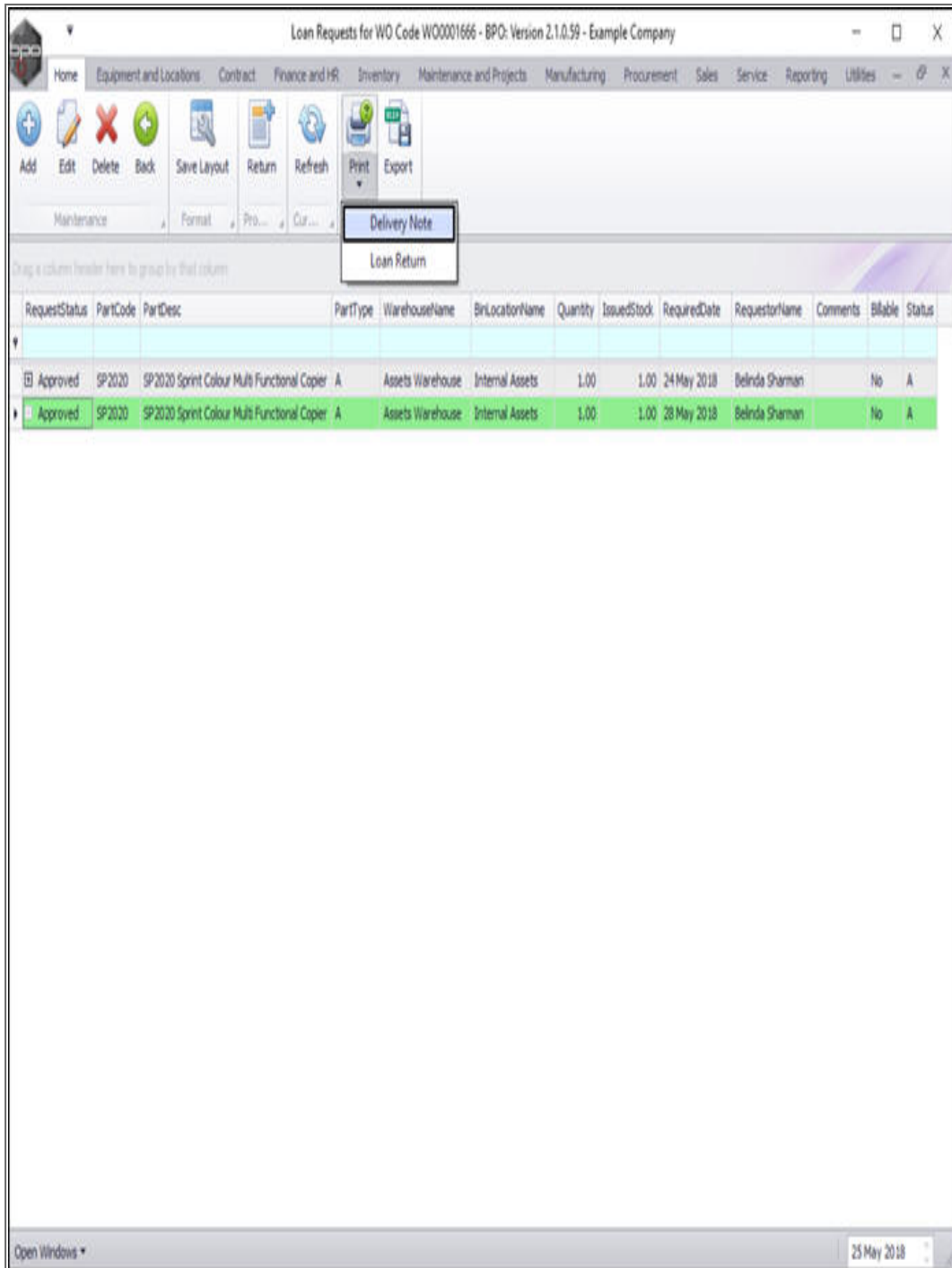
PRINT LOAN UNIT DELIVERY NOTE

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.

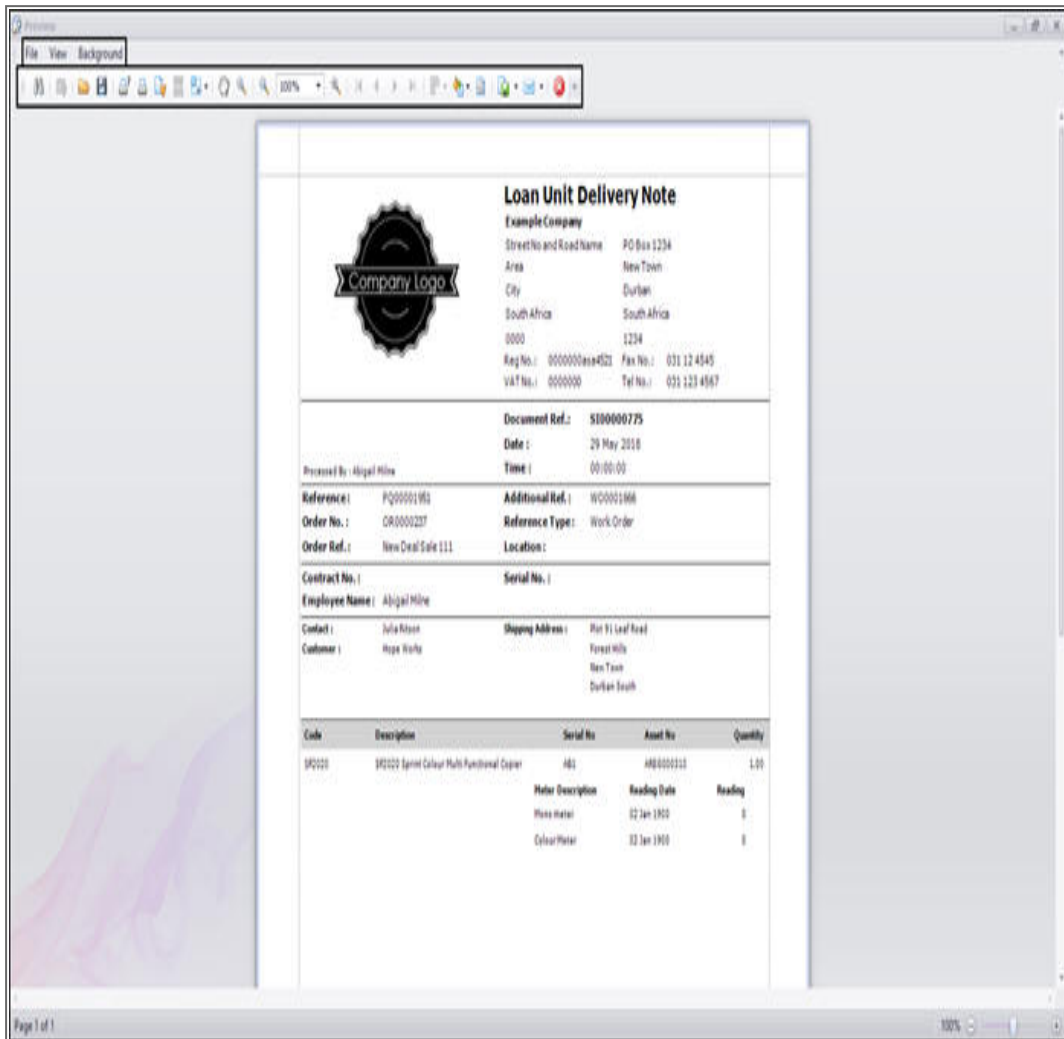
RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Shaman		No	A
Approved	SP2020	SP2020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

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



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

- From here you can **View, Print, Export** or **Email** the delivery note.
- **Close** the Report Preview screen when you are done.



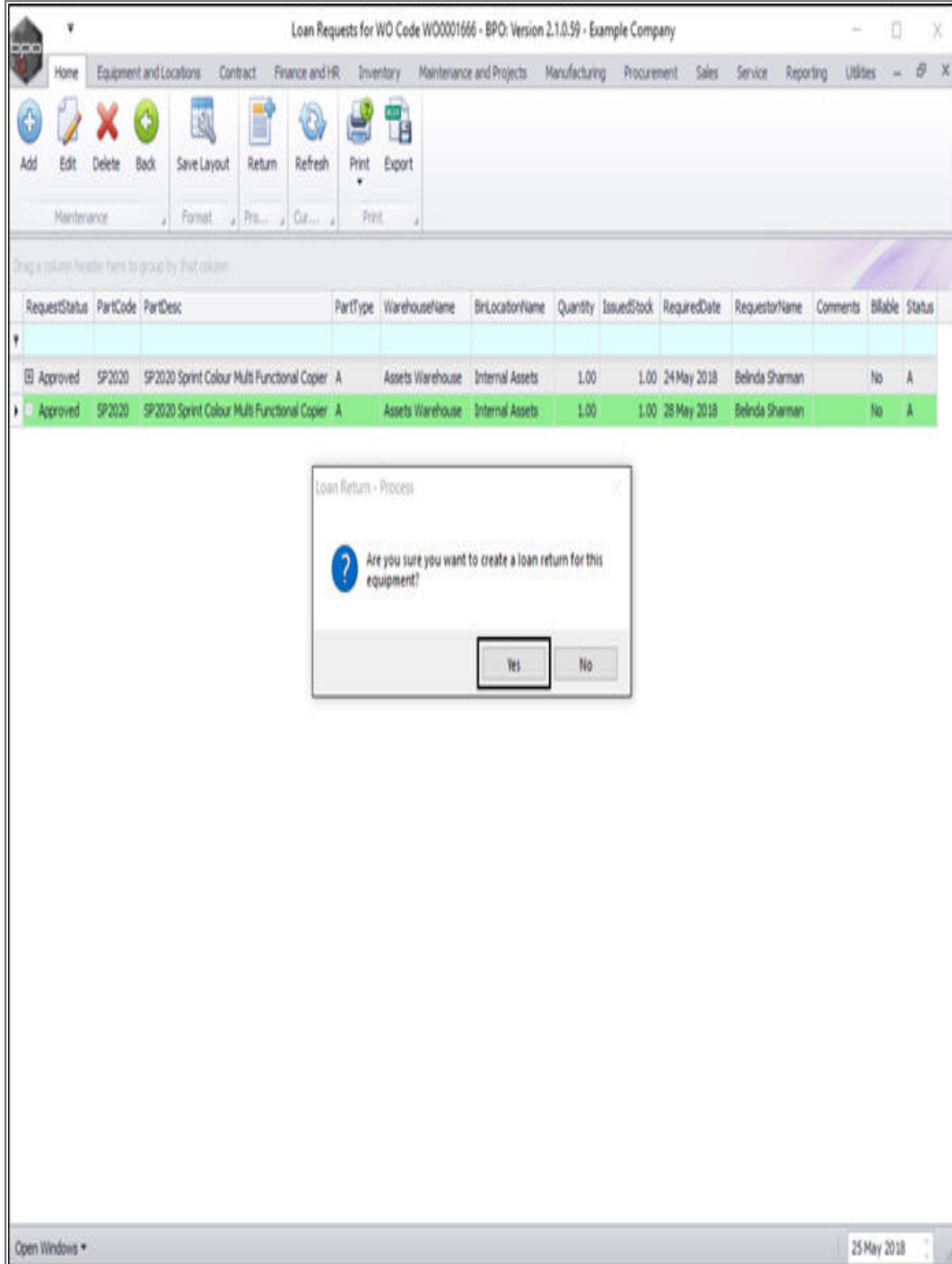
REQUEST LOAN UNIT RETURN

- 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

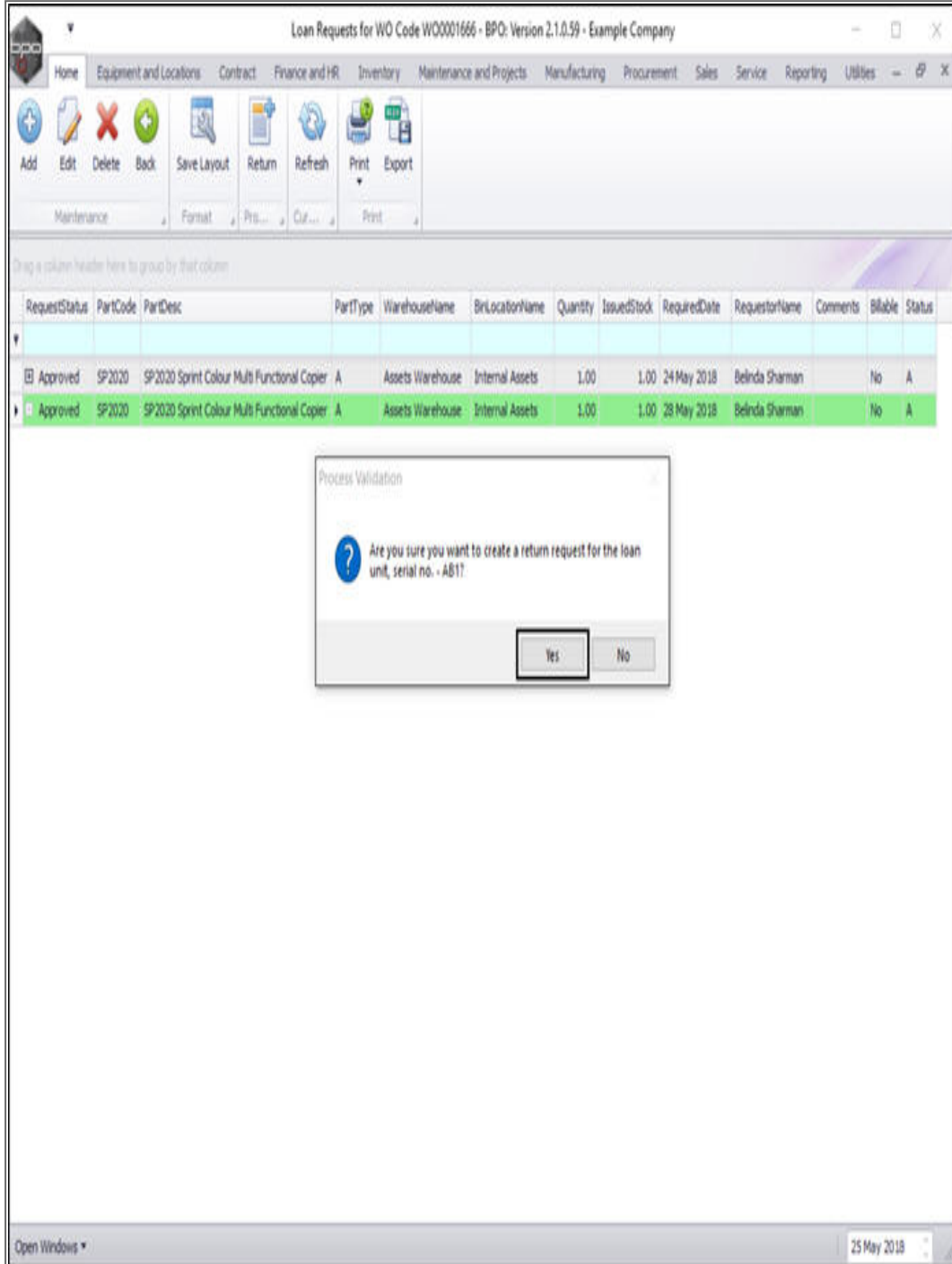
the frame does not contain any information (in this case, a **Loan Return Request**) yet.

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 Shaman		No	A
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	28 May 2018	Belinda Shaman		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**.



- 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 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 | 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 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.

The screenshot shows a software window titled "Loan Requests for WO Code W00001666 - BPO: Version 2.1.0.59 - Example Company". The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Return, Refresh, Print, and Export. A secondary toolbar contains Maintenance, Format, Print, and Export options.

The main content area displays a table of loan requests. The table has columns for RequestStatus, PartCode, PartDesc, PartType, WarehouseName, BinLocationName, Quantity, IssuedStock, RequiredDate, RequestorName, Comments, Billable, and Status. Two rows are visible, both with a status of "Approved". The second row is highlighted in green.

Below the main table, a "Return" frame is open, showing a detailed view of a return request. This frame contains a table with columns: DocNo, PartCode, PartType, PartDesc, SerialNo, ModelNo, WOCode, WODescription, Reason, RequestorName, and RequestStatus. One row is visible with the following data:

DocNo	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCode	WODescription	Reason	RequestorName	RequestStatus
RQ00000206	SP2020	A	SP2020 Sprint Colour Multi Functional Copier	AB1	SP2020	W00001666	Service Request - machine jamming...	Loan Return	Abigail Mine	Return - New

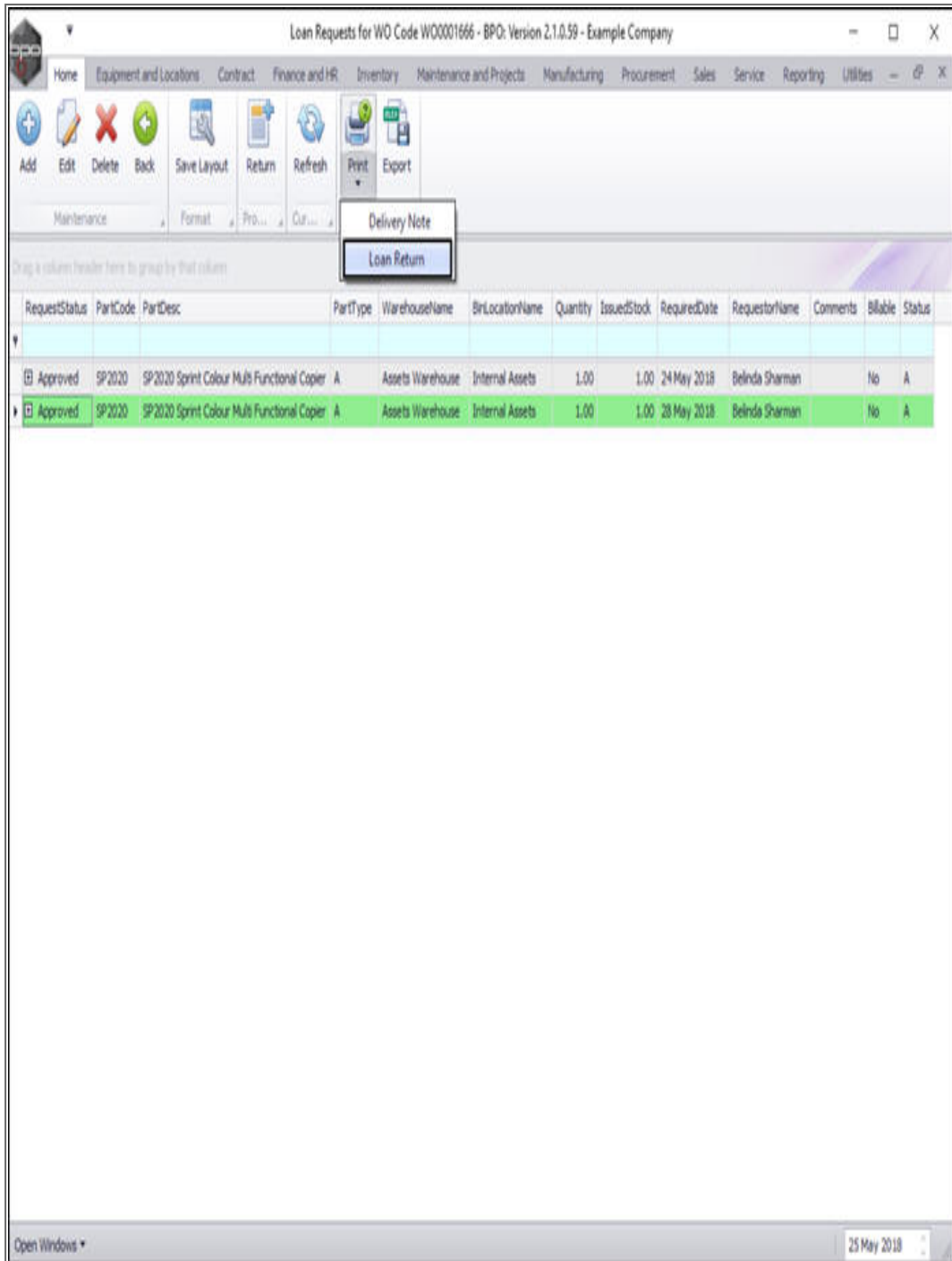
The bottom of the window shows "Open Windows" on the left and a date of "25 May 2018" on the right.

PRINT LOAN 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.

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	InLocationName	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

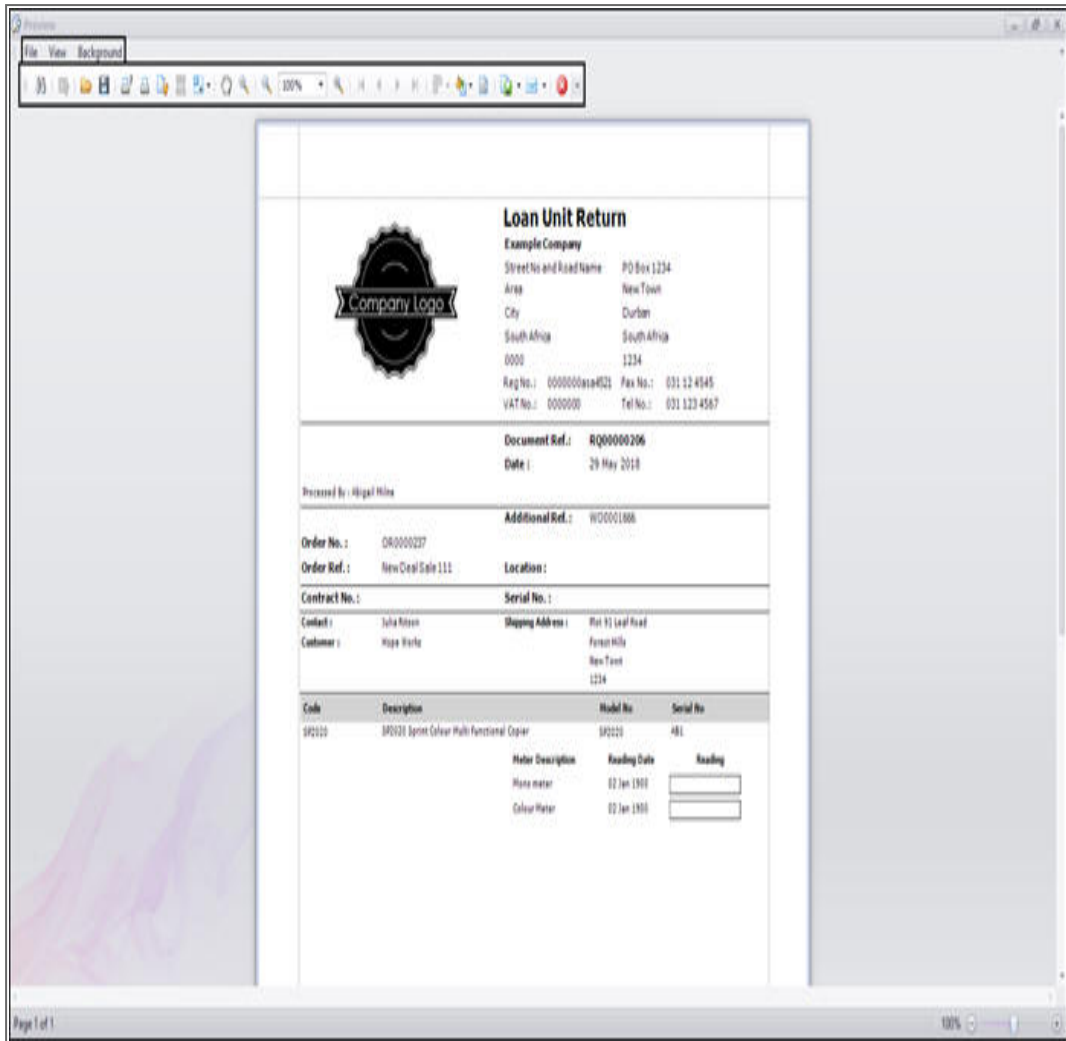
- A **Print options menu** will be displayed.
- Click on **Loan Return**.



The screenshot shows a software window titled "Loan Requests for WO Code W00001666 - BPO: Version 2.1.0.59 - Example Company". The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Return, Refresh, Print, and Export. A context menu is open over the table, showing options for "Delivery Note" and "Loan Return".

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

- 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:

- Return Loan Unit to Store
- Update Meter Reading

MNU.122.026