

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 work order linked to a call and where the work order item, equipment or location, is linked to a contract.

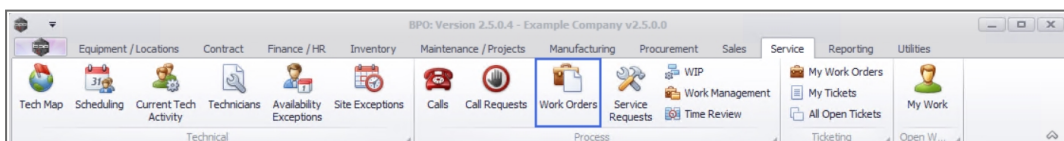
The loan unit must be returned before the call can be **closed**.

Meter readings should be taken before issuing and on collection of 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.

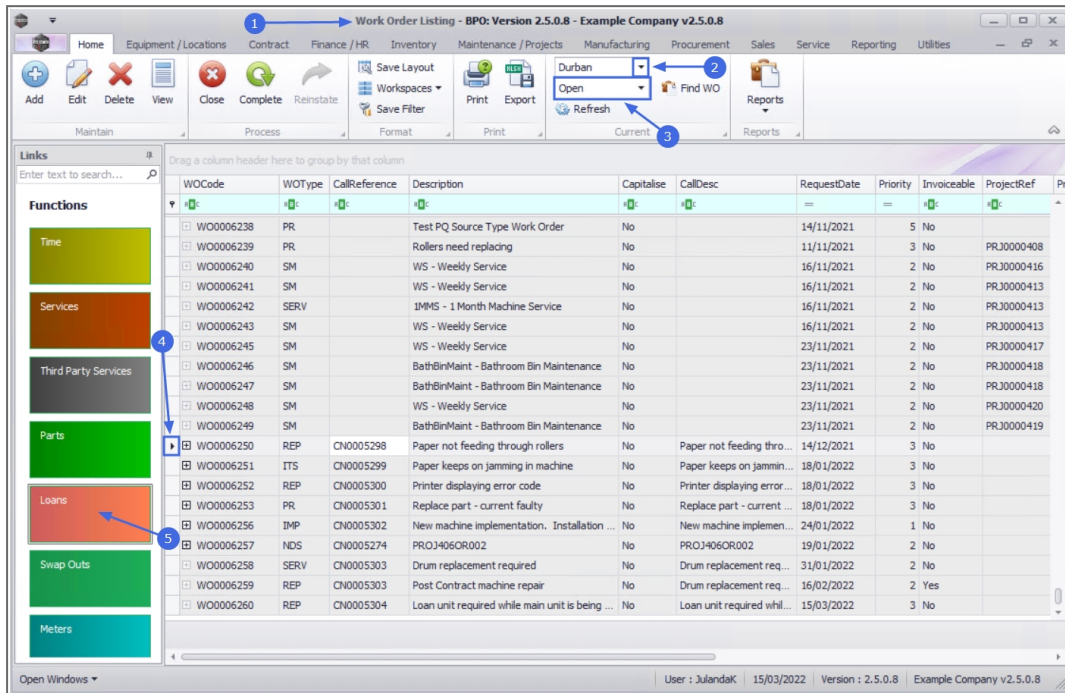
Loan machines must be **Internal Assets**. The system will assist in converting a stock item to an asset, where required.

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**.

4. Click on the **row** of the work order you wish to raise a **loan request** against.
5. Click on the **Loans** tile.



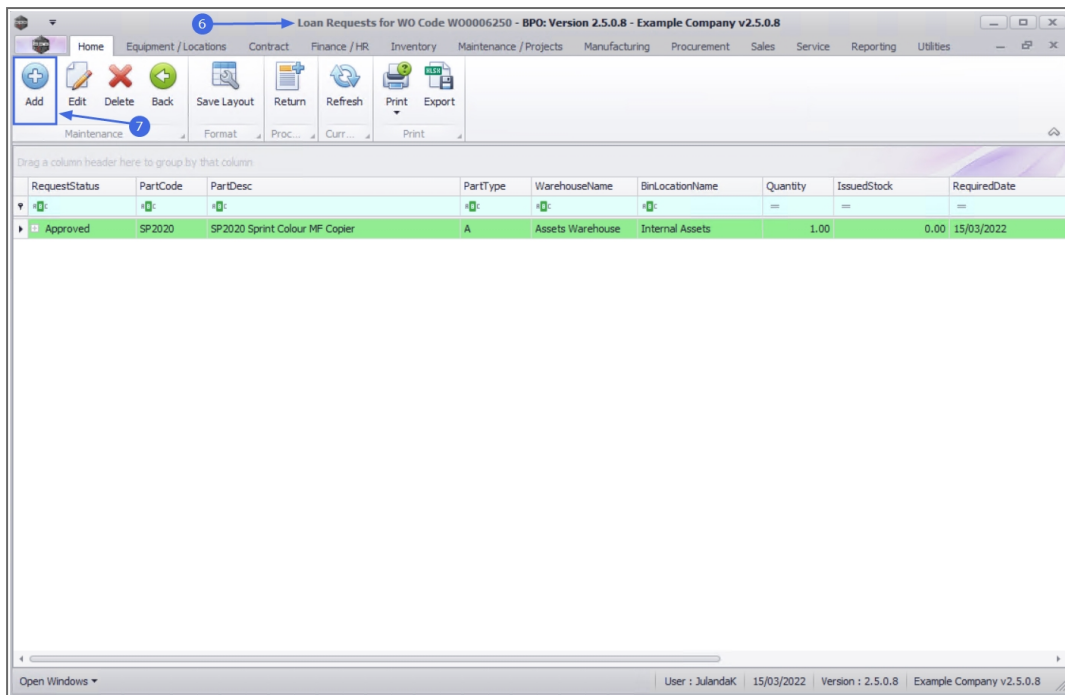
6. The **Loan Requests for WO Code [work order code]** screen will be displayed.

REQUEST LOAN UNIT

7. Click on **Add**.



Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



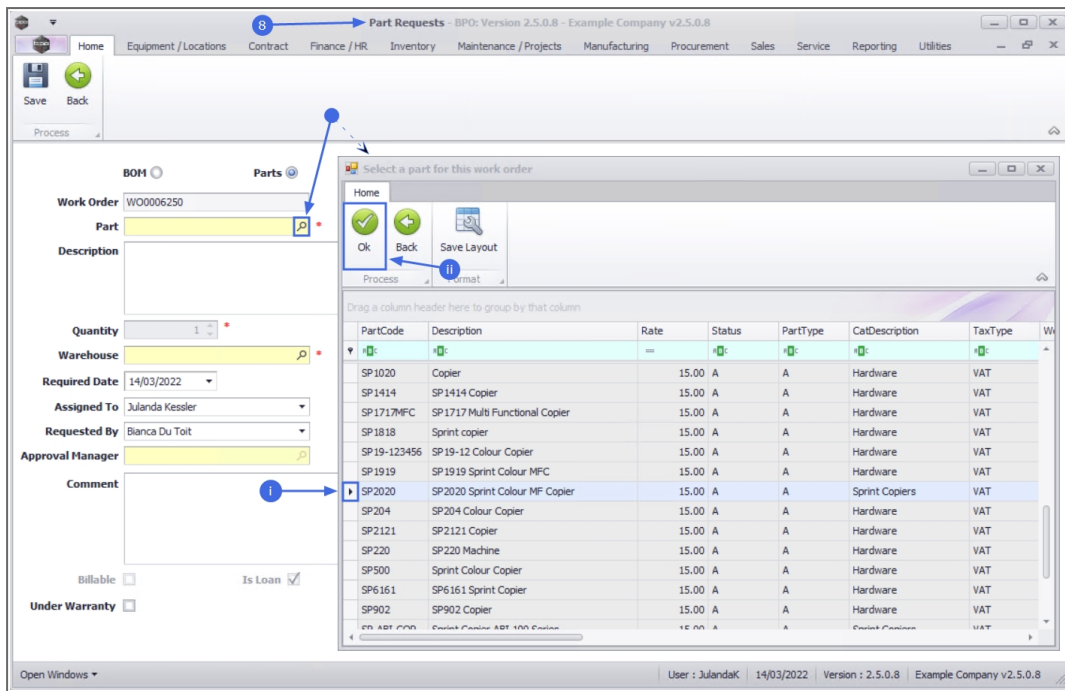
RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate
Approved	SP2020	SP2020 Sprint Colour MF Copier	A	Assets Warehouse	Internal Assets	1.00	0.00	15/03/2022

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 initially 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**.



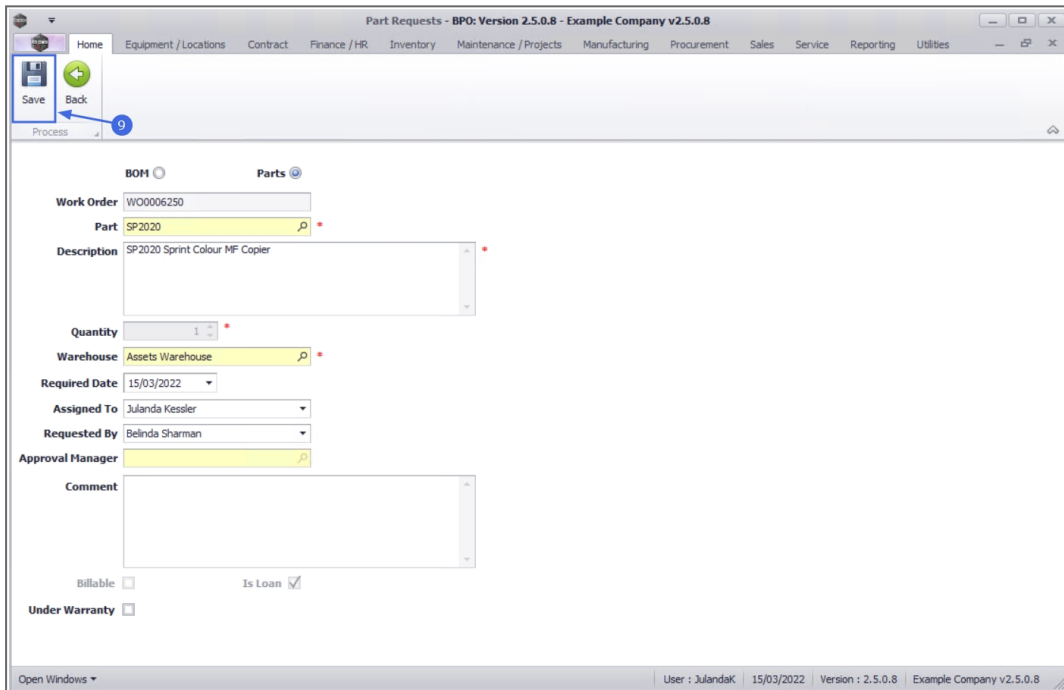
Note that the loan item selected, should preferably be the same model as the item being repaired, to ensure minimum usage disruption during the loan period.



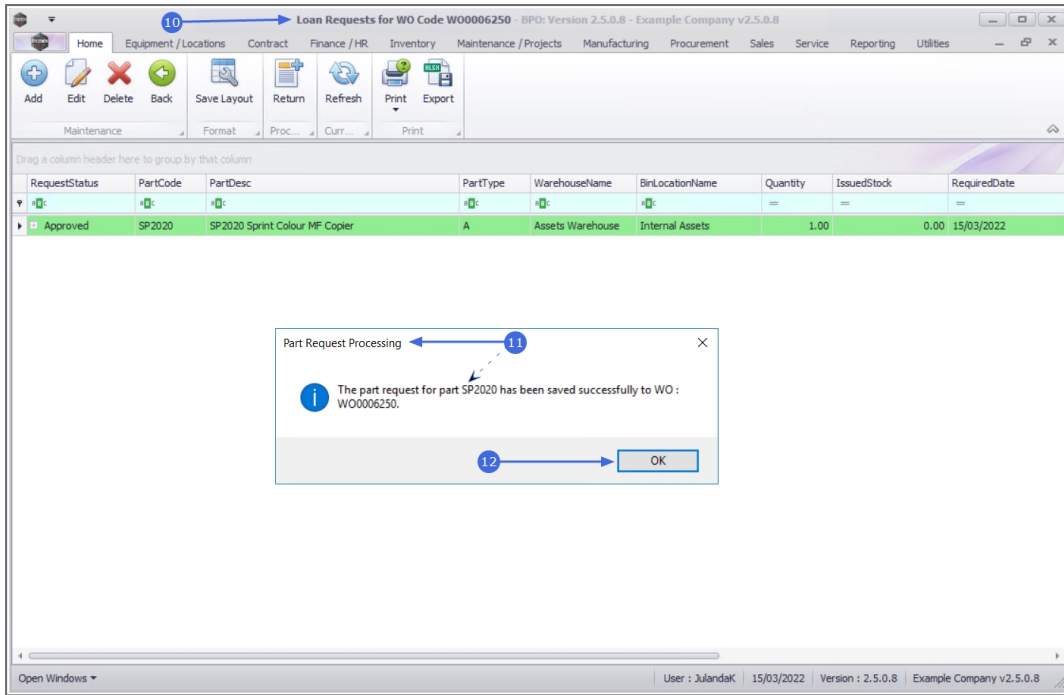
- **Part Number:** The part number will be populated with the part number selected.
- **Description:** This field will display the description for the part number selected.
- **Quantity:** The quantity has been set to 1, as only 1 loan unit can be issued at time.
- **Warehouse:** The warehouse will auto 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 cannot 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.

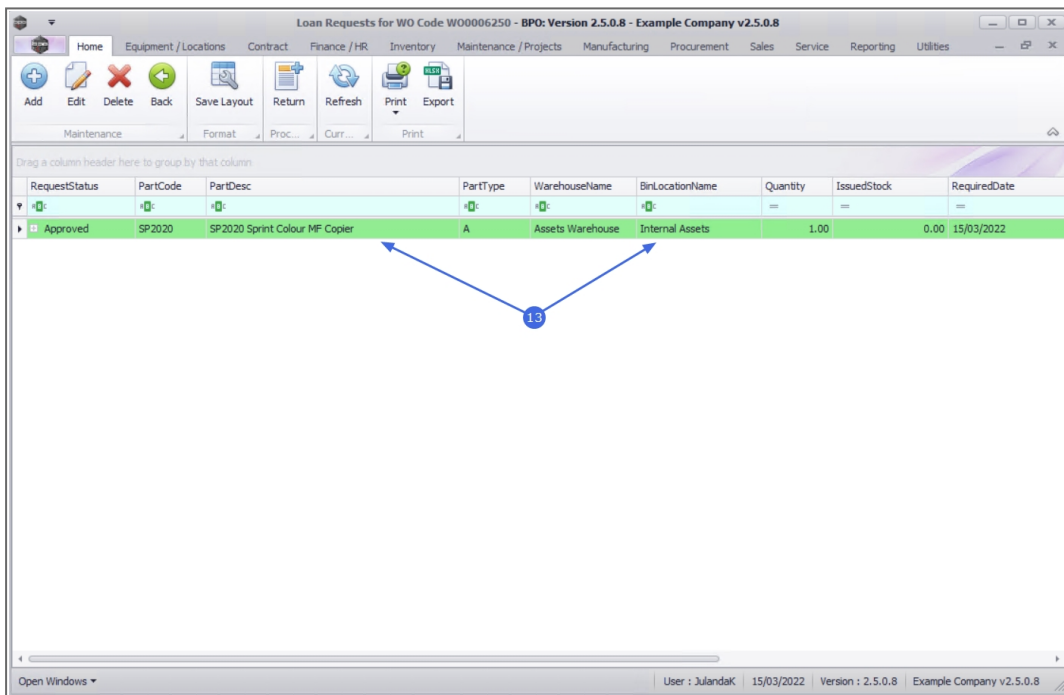
9. When finished adding the details to this screen, click on **Save**.



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**.



13. You can now **view** the part loan request details.



Issue Loan Unit

If the system is *not* set to auto approve part requests, then the loan unit (part) request has to be approved first, and then issue the approved loan unit (part) request.

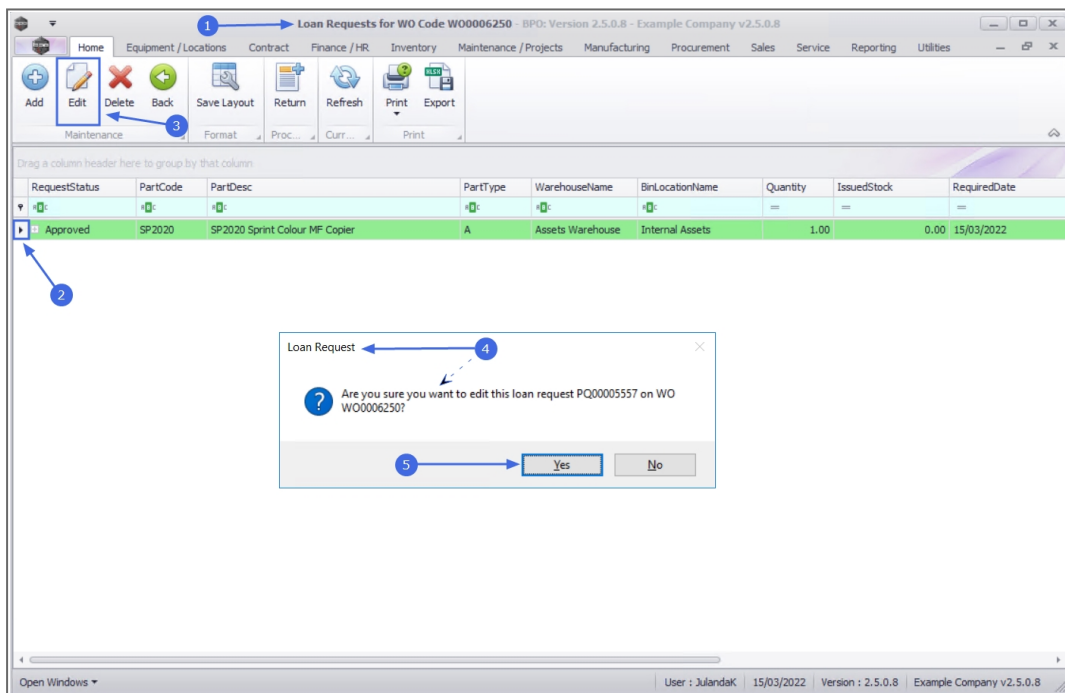
EDIT LOAN UNIT

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**.

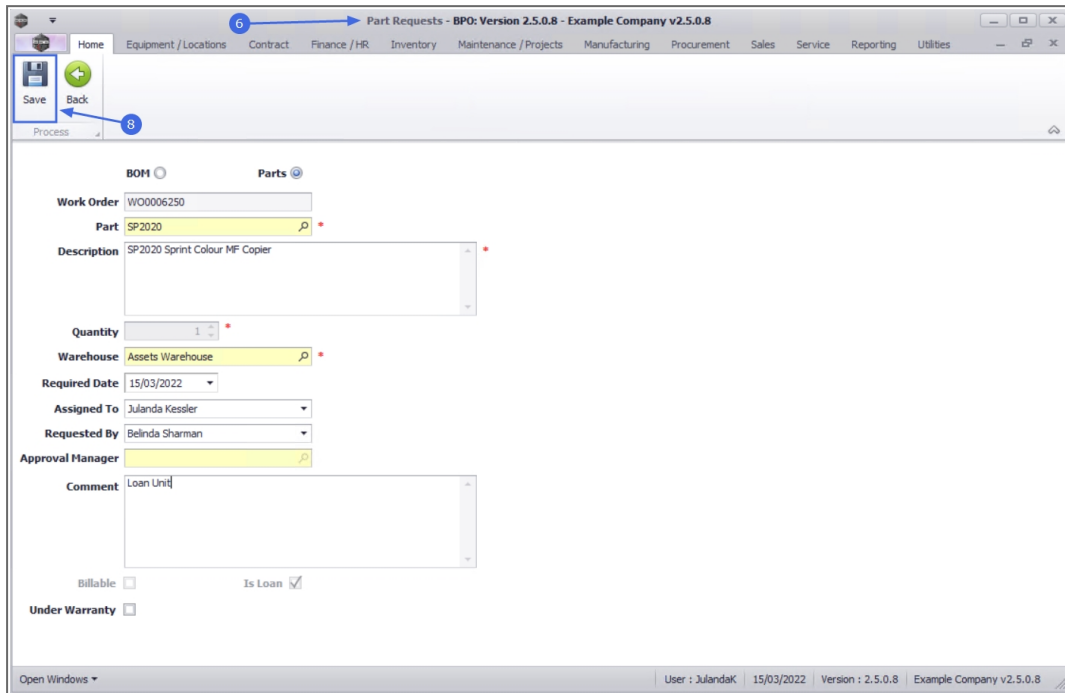


Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.

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**.



6. The **Part Requests** screen will be displayed.
7. Make the required changes to the part request screen.
8. Click on **Save**.



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.



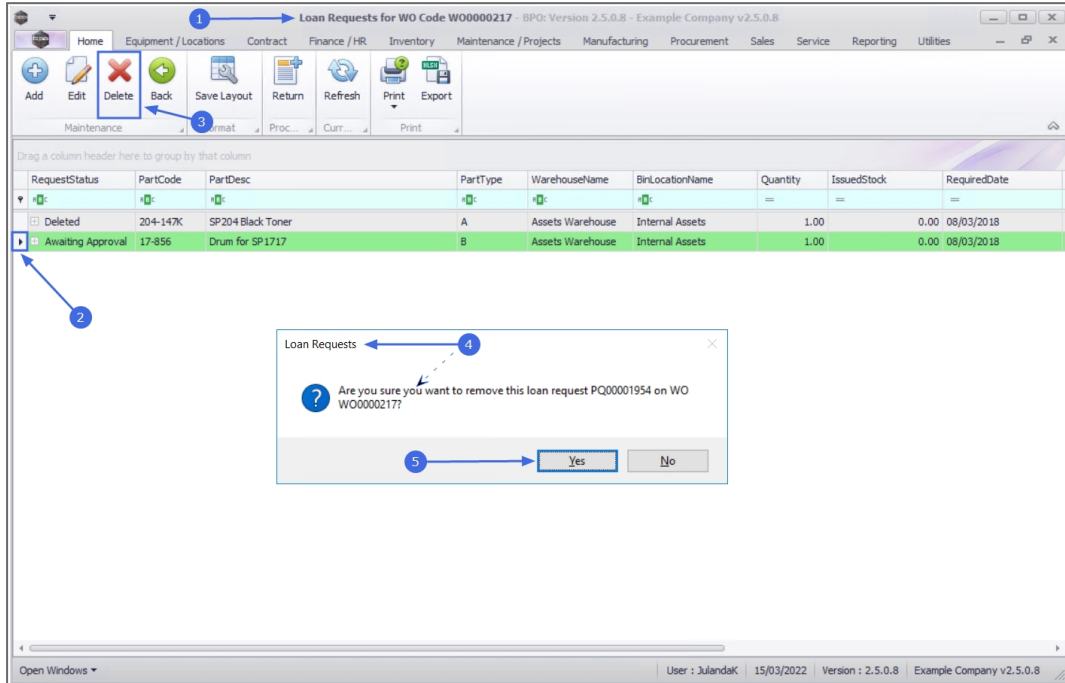
Note the Request Status as **Awaiting Approval**.

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**.



6. The **Request Status** for the loan request has changed to **Deleted**.

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate
Deleted	204-147K	SP204 Black Toner	A	Assets Warehouse	Internal Assets	1.00	0.00	08/03/2018
Deleted	17-856	Drum for SP1717	B	Assets Warehouse	Internal Assets	1.00	0.00	08/03/2018

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**.

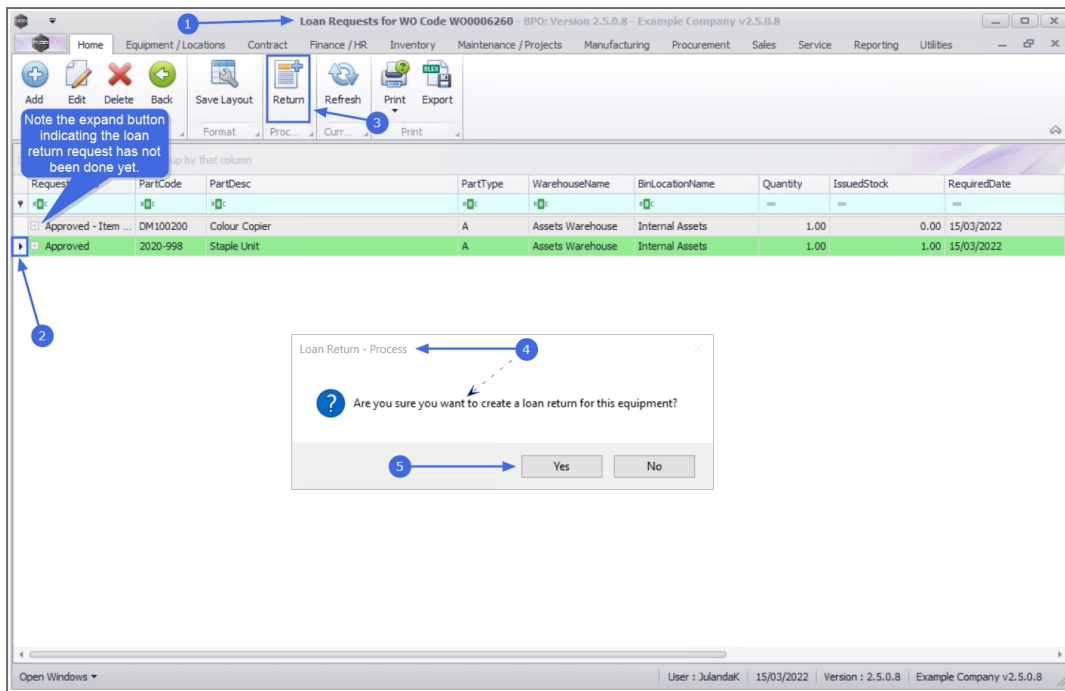


Short cut key: **Right click** to display the **All groups** menu list. Click on **Return**.

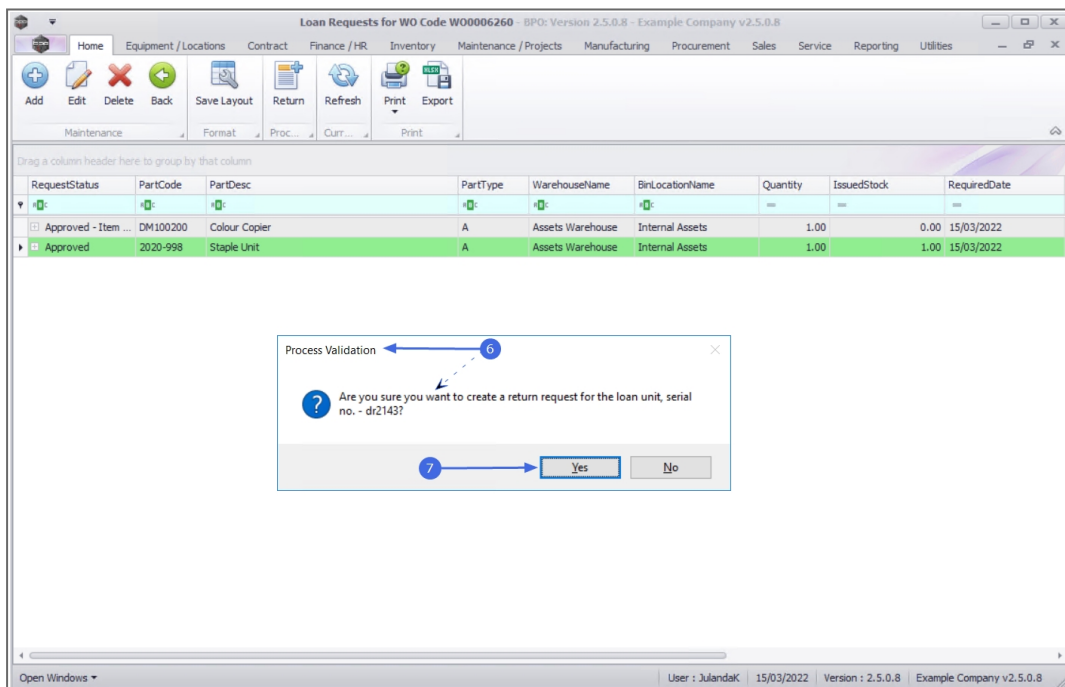
4. When you receive the **Loan Return - Process** message to confirm;
 - **Are you sure you want to create a loan return for this equipment?**
5. Click on **Yes**.



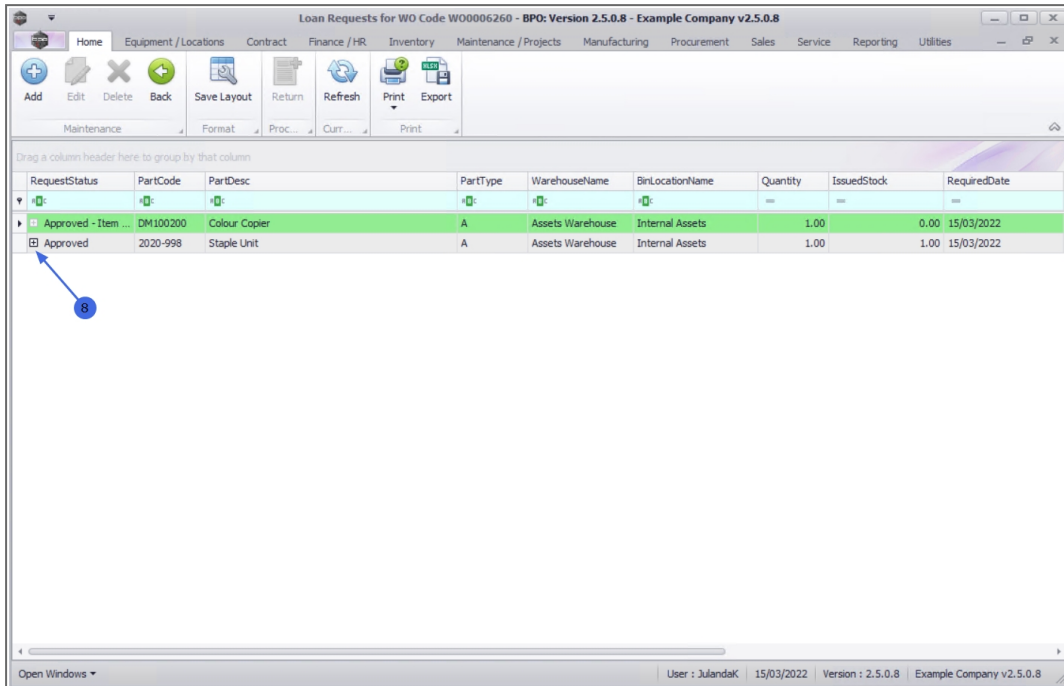
Refer to [Request Loan Unit Return](#) for a detailed handling off this process.



- 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]?
- Click on **Yes**.



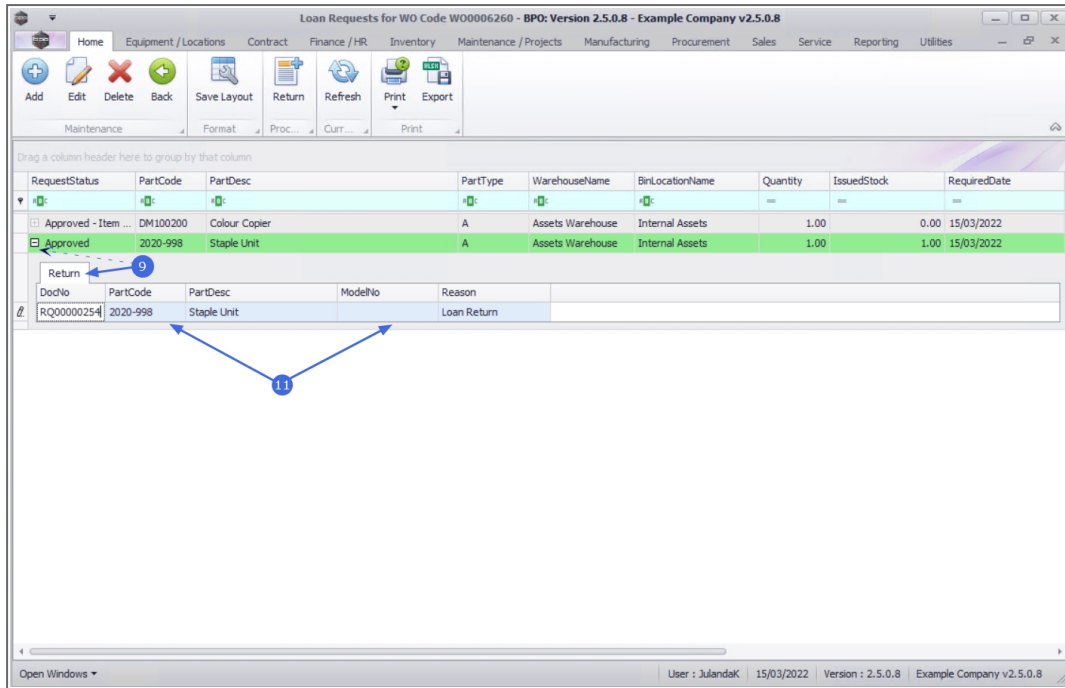
- Note that the expand button is visible indicating that the return request has been done.



RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate
Approved - Item ...	DM100200	Colour Copier	A	Assets Warehouse	Internal Assets	1.00	0.00	15/03/2022
Approved	2020-998	Staple Unit	A	Assets Warehouse	Internal Assets	1.00	1.00	15/03/2022

VIEW LOAN UNIT RETURN REQUEST

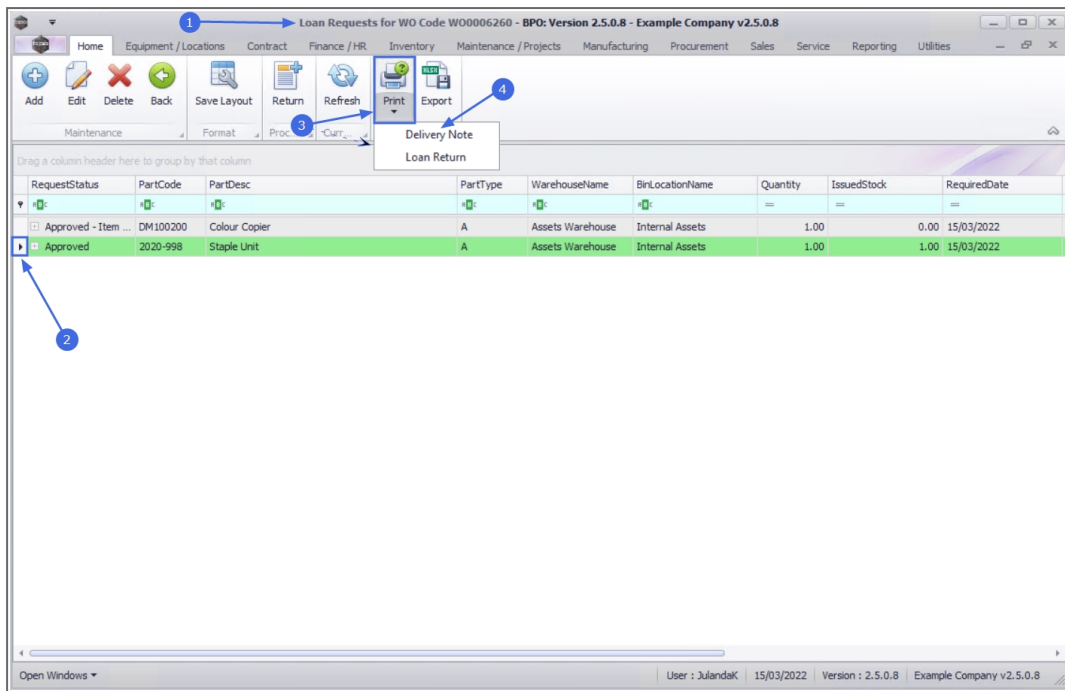
- In the *Loan Requests for WO Code* screen, click on the **expand** icon in the **row** of the selected loan request.
- The **Return** frame will be expand.
- Here you can view the loan return **details**.



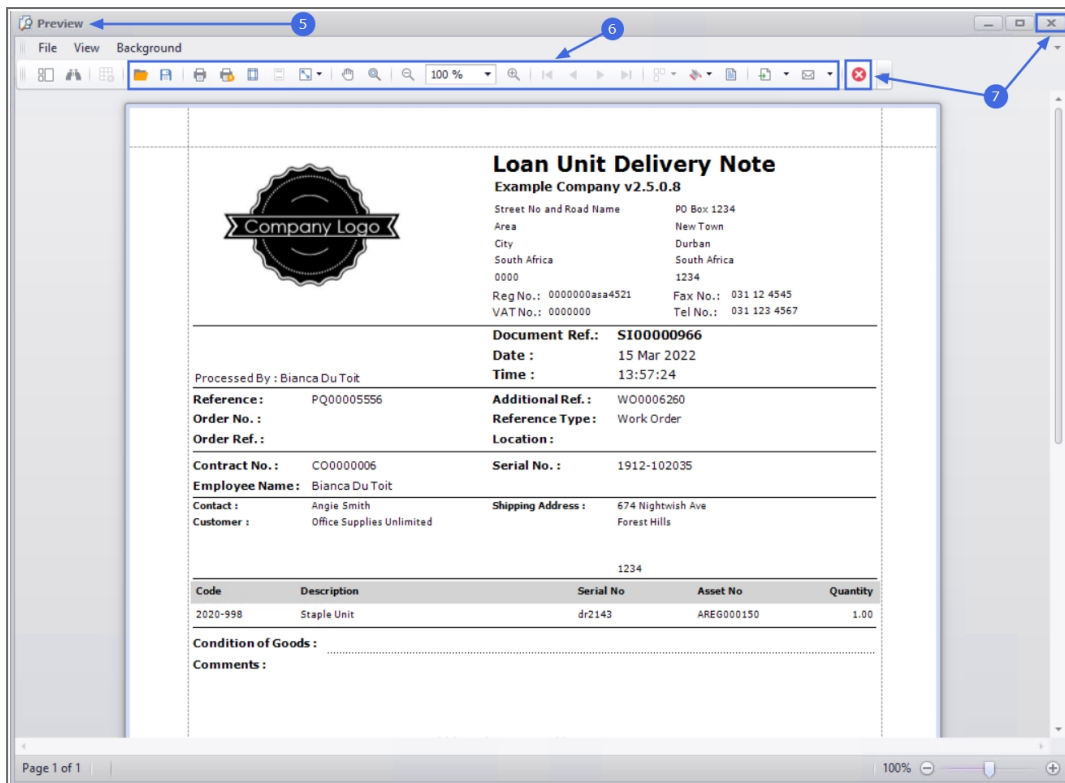
PRINT LOAN UNIT DELIVERY NOTE

The Loan Unit Delivery Note can only be printed after 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**.



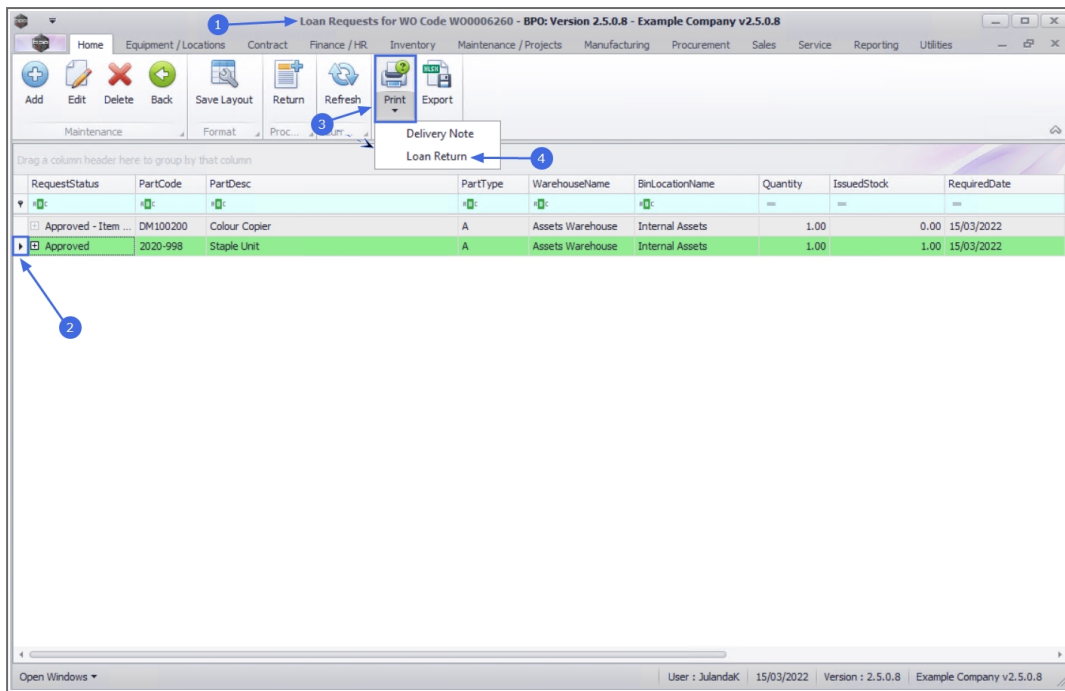
5. The Loan Unit Delivery Note will display in the **Report Preview** screen.
6. From this screen you can make cosmetic changes to the document, as well as **View, Print, Export** or **Email** the Loan Unit Delivery Note.
7. **Close** the Report Preview screen when done.



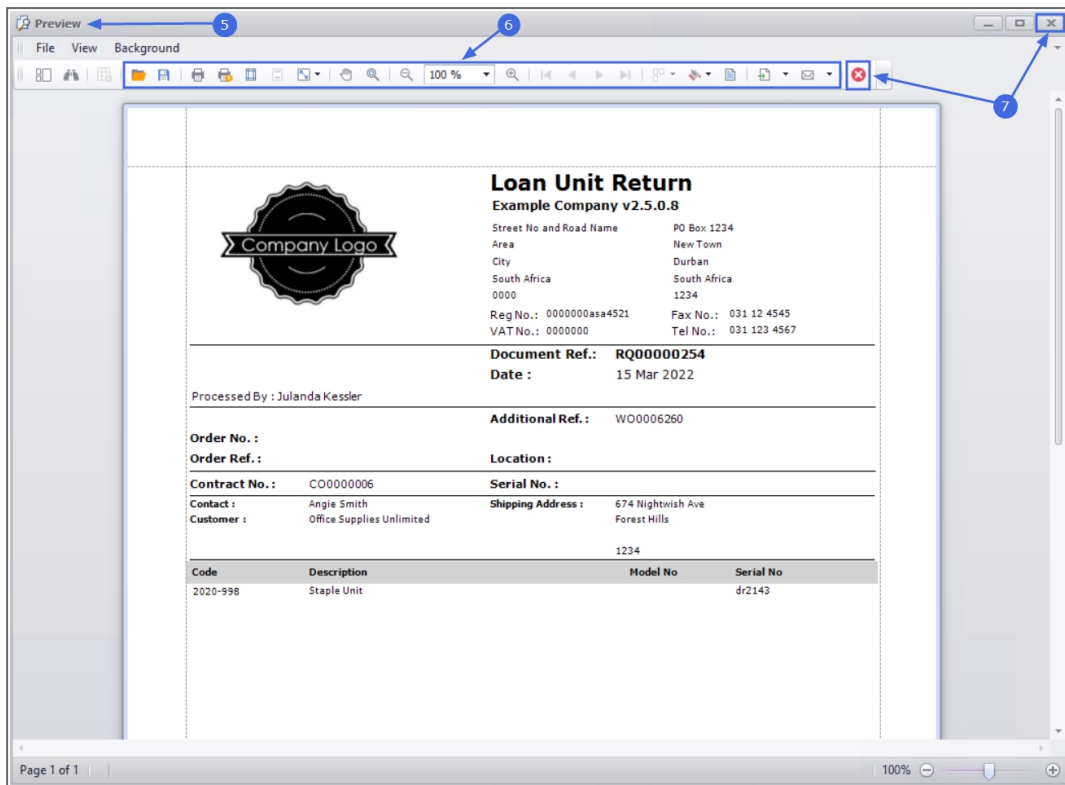
PRINT LOAN UNIT RETURN NOTE

This *Loan Unit Return document* will be taken to the client on delivery of the *repaired machine* and simultaneous collection 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**.



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.



Related Topics

- [Issue Loan Unit](#)
- [Request Loan Unit Return](#)
- [Return Loan Unit to Store](#)
- [Update Meter Reading](#)

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