

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.

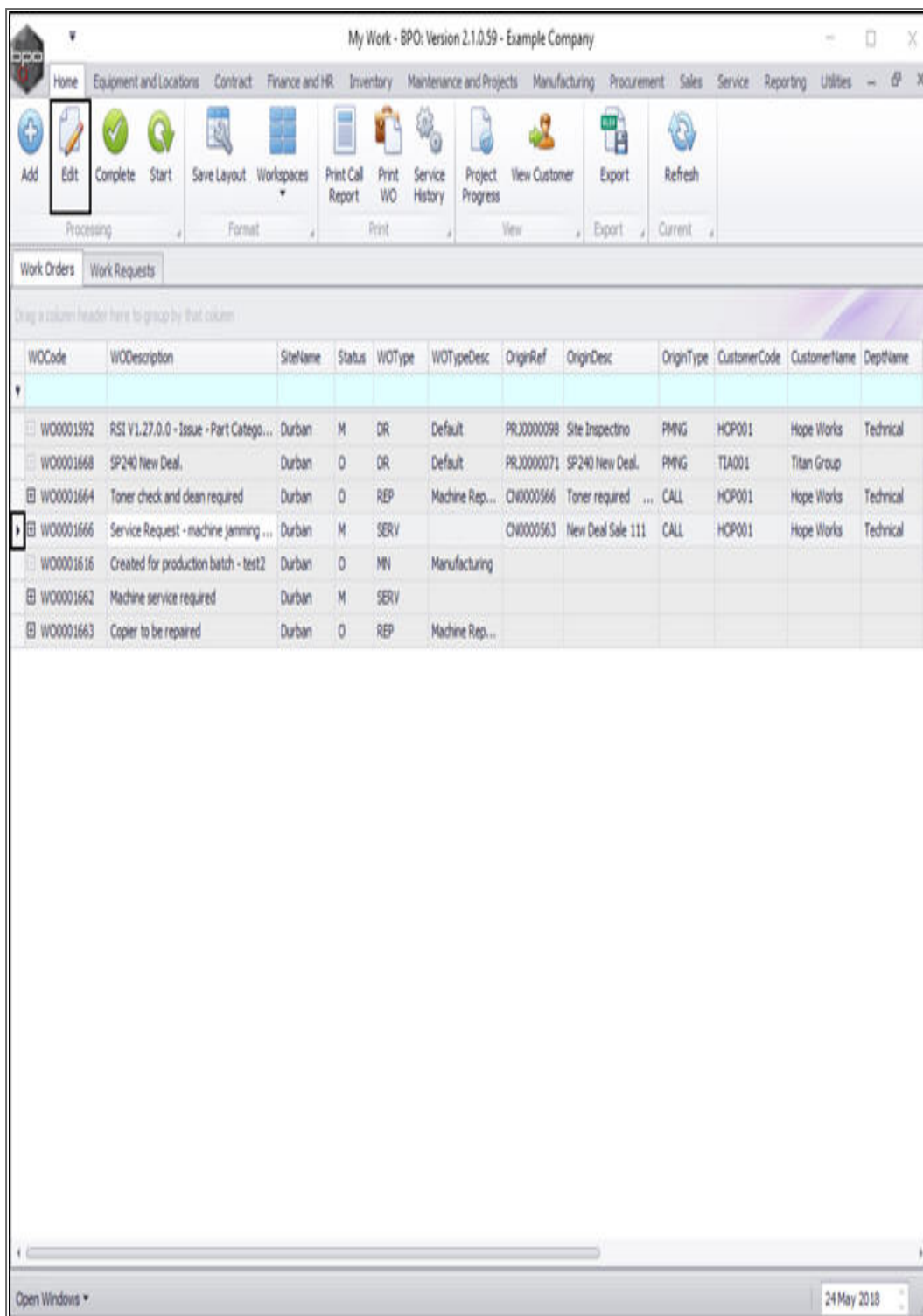
Ribbon Access: *Maintenance / Projects > Work Requests*



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

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.



My Work - 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 Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project Progress New Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

WOCODE	WODescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName
WO0001592	RS1 V1.27.0.0 - Issue - Part Catego...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical
WO0001668	SP240 New Deal	Durban	O	DR	Default	PRJ0000071	SP240 New Deal	PMNG	TJA001	Titan Group	
WO0001664	Toner check and clean required	Durban	O	REP	Machine Rep...	CH0000066	Toner required ...	CALL	HOP001	Hope Works	Technical
WO0001666	Service Request - machine jamming ...	Durban	M	SERV		CH0000063	New Deal Sale 111	CALL	HOP001	Hope Works	Technical
WO0001616	Created for production batch - test12	Durban	O	MN	Manufacturing						
WO0001662	Machine service required	Durban	M	SERV							
WO0001663	Copier to be repaired	Durban	O	REP	Machine Rep...						

Open Windows 24 May 2018

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

- Click on the **Loans** tile.

Maintain WO - Ref 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

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Meters

Open Windows

Description: Service Request - machine jamming during printing.

Requestor: Abigal Mine

WO Type: Repair

Priority: 2

Request Date: 22 May 2018 10:59:57

Status: N - Completed

Billable: ☐

Capitalise: ☐

Work Order Item

Functional Location:

Equipment:

Item: 20-12345

Comment:

Links:

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CN0000563
PMWG	Project Reference	

Schedule:

Assigned To: Abigal Mine

Assigned By: Abigal Mine

Scheduled Start: 22 May 2018 12:00:00

Scheduled End: 22 Jun 2018 14:00:00

Actual Start: 22 Jun 2018 00:00:00

Actual End: 22 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

Rectification Code:

Rectification Comments:

Completion Date: 21 Jun 2018 00:00:00

Equipment Info

Additional Data

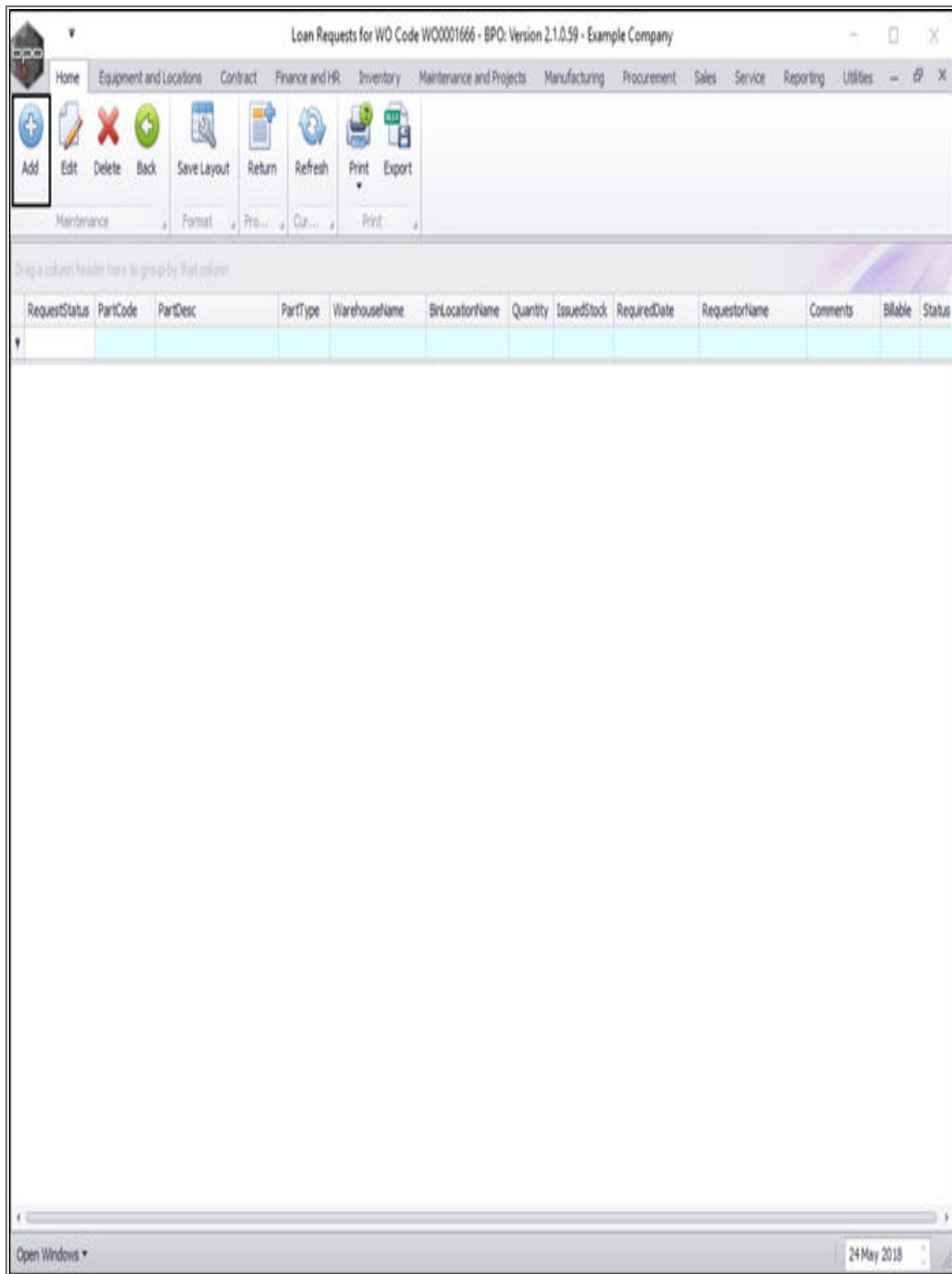
Customer Info

Required Credits

24 May 2018

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 second step 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

BOH  Parts 

Work Order WO0001666

Part  *

Description  *

Quantity 1 *

Warehouse  *

Required Date 24 May 2018

Assigned To Abigail Mline

Requested By Belinda Sharman

Comment

Billable ☐ Is Loan ☒

Under Warranty ☐

Open Windows 24 May 2018

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

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

BOH
Parts

Work Order
WO0001666

Part

Description

Quantity
1

Warehouse

Required Date
24 May 2018

Assigned To
Abigail Mine

Requested By
Belinda Sharman

Comment

Billable
Is Loan

Under Warranty

Open Windows
24 May 2018

- 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**.

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 WO0001666

Part

Description

Quantity

Warehouse

Required Date 24 May 2018

Assigned To Abigail Mline

Requested By Belinda Sharman

Comment

Billable

Under Warranty

Select a part for this work order

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

PartCode	Description	Rate	PartType	Status	TaxType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure
SP1717MFC	SP1717 Multi Functional C...	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 Mult...	15.00	A	A	VAT	Hardware	5.2		SP2020	ea
SP204	SP204 Colour Copier	15.00	A	A	VAT	Hardware			SP204	
SP2121	SP2121 Copier	15.00	A	A	VAT	Hardware				
SP900	Sprint Colour Copier	15.00	A	A	VAT	Hardware				
SP6161	SP6161 Sprint Copier	15.00	A	A	VAT	Hardware			SP6161	
SP902	SP902 Copier	15.00	A	A	VAT	Hardware			SP902	
TEST123	Test Part	15.00	A	A	VAT	Hardware	10	20	1023	ea
TMA01	Test Machine	15.00	A	A	VAT	Hardware				
X821932-002	Microsoft Mouse	15.00	A	A	VAT	Accessories			1454	

Open Windows

24 May 2018

- **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.

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

BOH Parts

Work Order W00001666

Part SP2020

Description SP2020 Sprint Colour Multi Functional Copier

Quantity 1

Warehouse Assets Warehouse

Required Date 24 May 2018

Assigned To Abigail Mire

Requested By Belinda Sharman

Comment

Billable ☐ Is Loan ☒ Under Warranty ☐

Open Windows 24 May 2018

- 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

BOH Parts

Work Order WO0001666

Part SP2020

Description SP2020 Sprint Colour Multi Functional Copier

Quantity 1

Warehouse Assets Warehouse

Required Date 24 May 2018

Assigned To Abigail Mline

Requested By Belinda Sharman

Comment

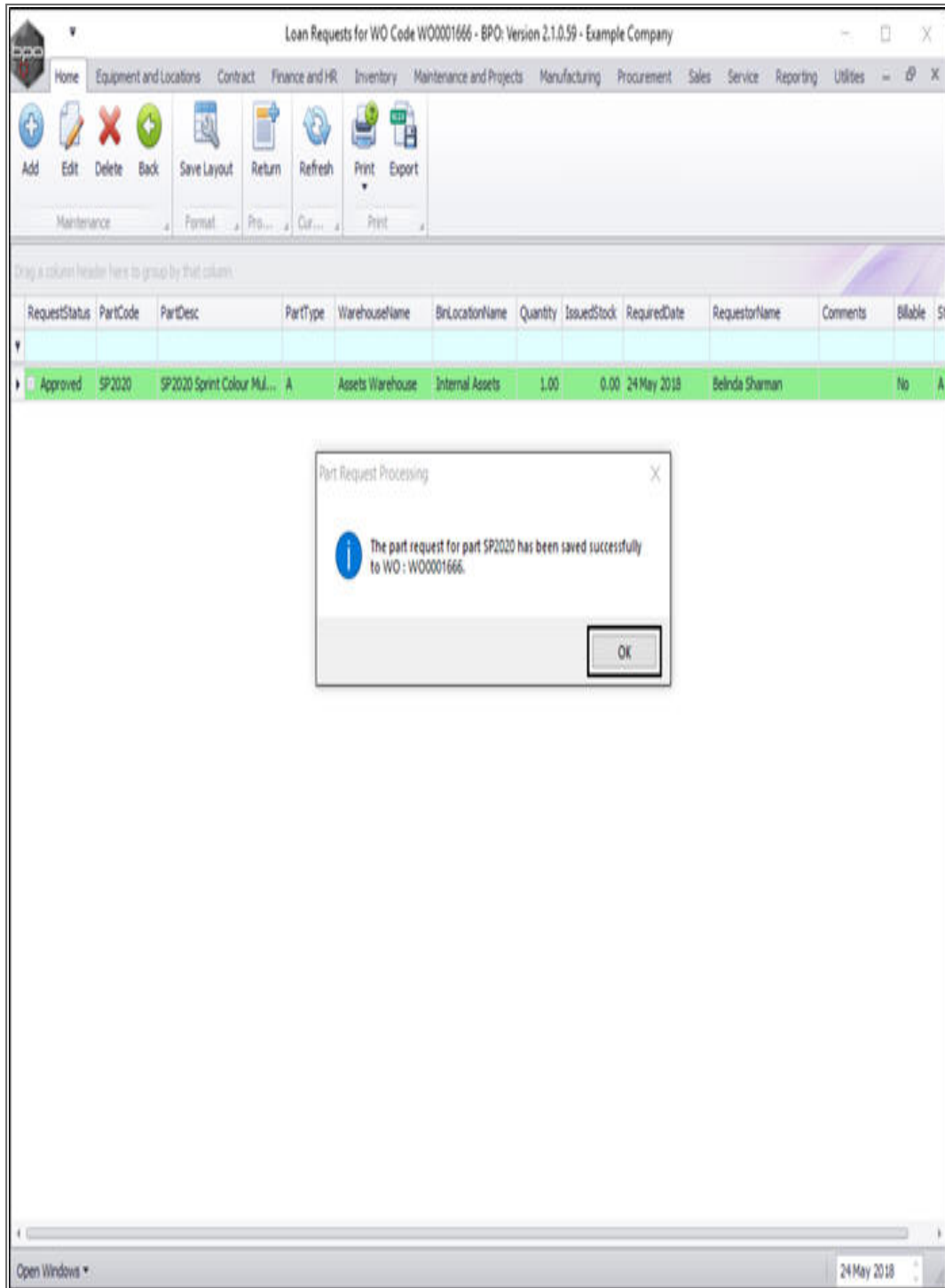
Billable ☐ Is Loan ☒

Under Warranty ☐

Open Windows 24 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***.



The screenshot shows the 'Loan Requests for WO Code WO0001666 - BPO: Version 2.1.0.59 - Example Company' window. 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 table of loan requests is displayed, with columns for RequestStatus, PartCode, PartDesc, PartType, WarehouseName, BinLocationName, Quantity, IssuedStock, RequiredDate, RequestorName, Comments, Billable, and Status. A dialog box titled 'Part Request Processing' is open, displaying a message: 'The part request for part SP2020 has been saved successfully to WO : WO0001666.' with an 'OK' button.

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
Approved	SP2020	SP2020 Sprint Colour M.U.L...	A	Assets Warehouse	Internal Assets	1.00	0.00	24 May 2018	Belinda Sharman		No	A

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

PRINT DELIVERY NOTE

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

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

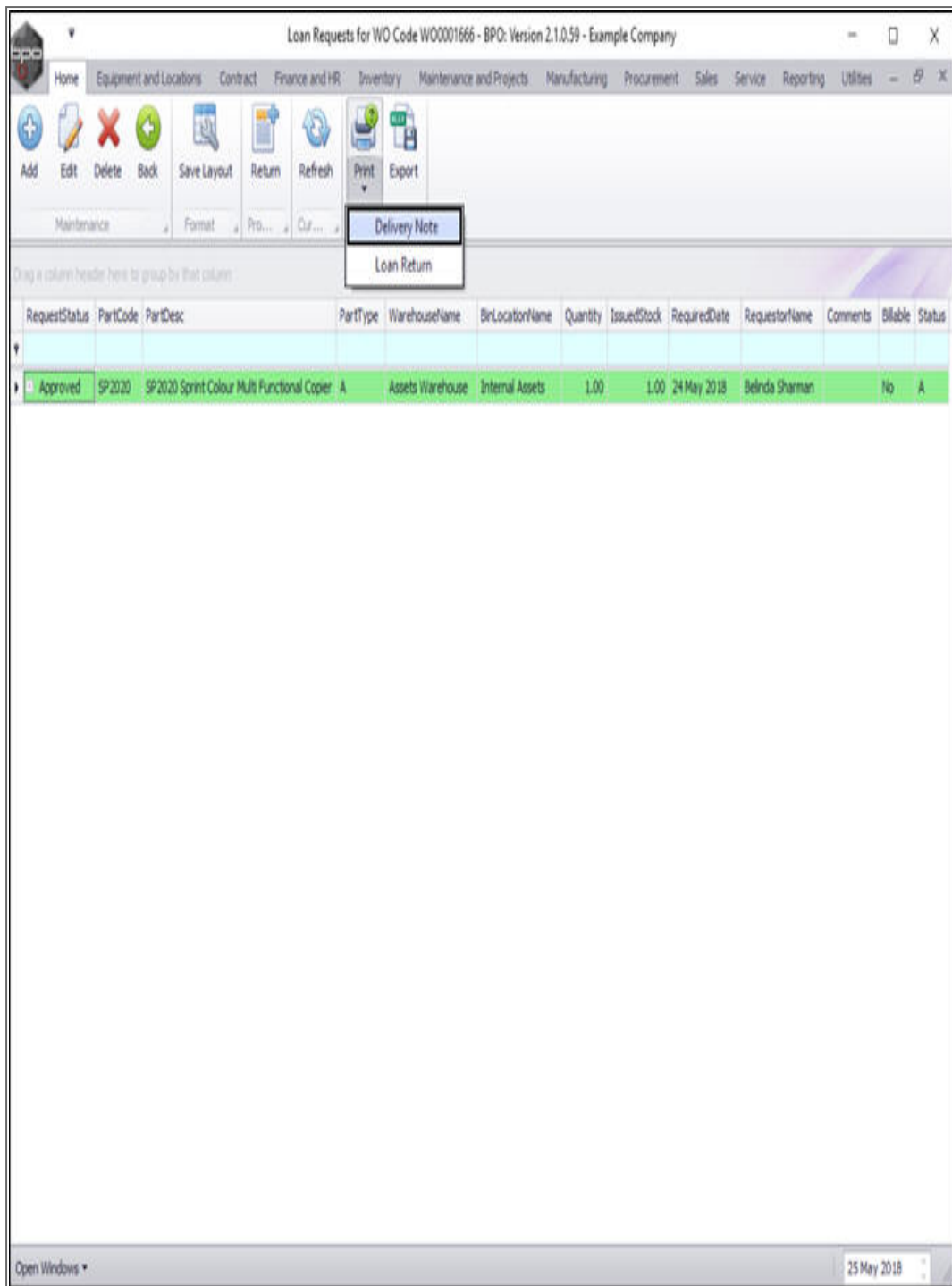
Maintenance Format Prev... Cur... Print

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

Open Windows 25 May 2018

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



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 Pro... Cur... Delivery Note Loan Return

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 Shaman	No	A	

Open Windows 25 May 2018

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

- Loan Unit Delivery Note**



Example Company
 Street No and Road Name PO Box 1234
 Area New Town
 City Durban
 South Africa South Africa
 0000 1234
 Reg No.: 00000000000000000000 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

Document Ref.: S100000772	
Date : 25 May 2010	
Time : 00:00:00	

Processed By : Abigail Mhile	
Reference: PQ00001900	Additional Ref.: W00001608
Order No.: OR0000227	Reference Type: Work Order
Order Ref.: New Deal Sale 111	Location:

Contract No.:	Serial No.:
Employee Name: Abigail Mhile	

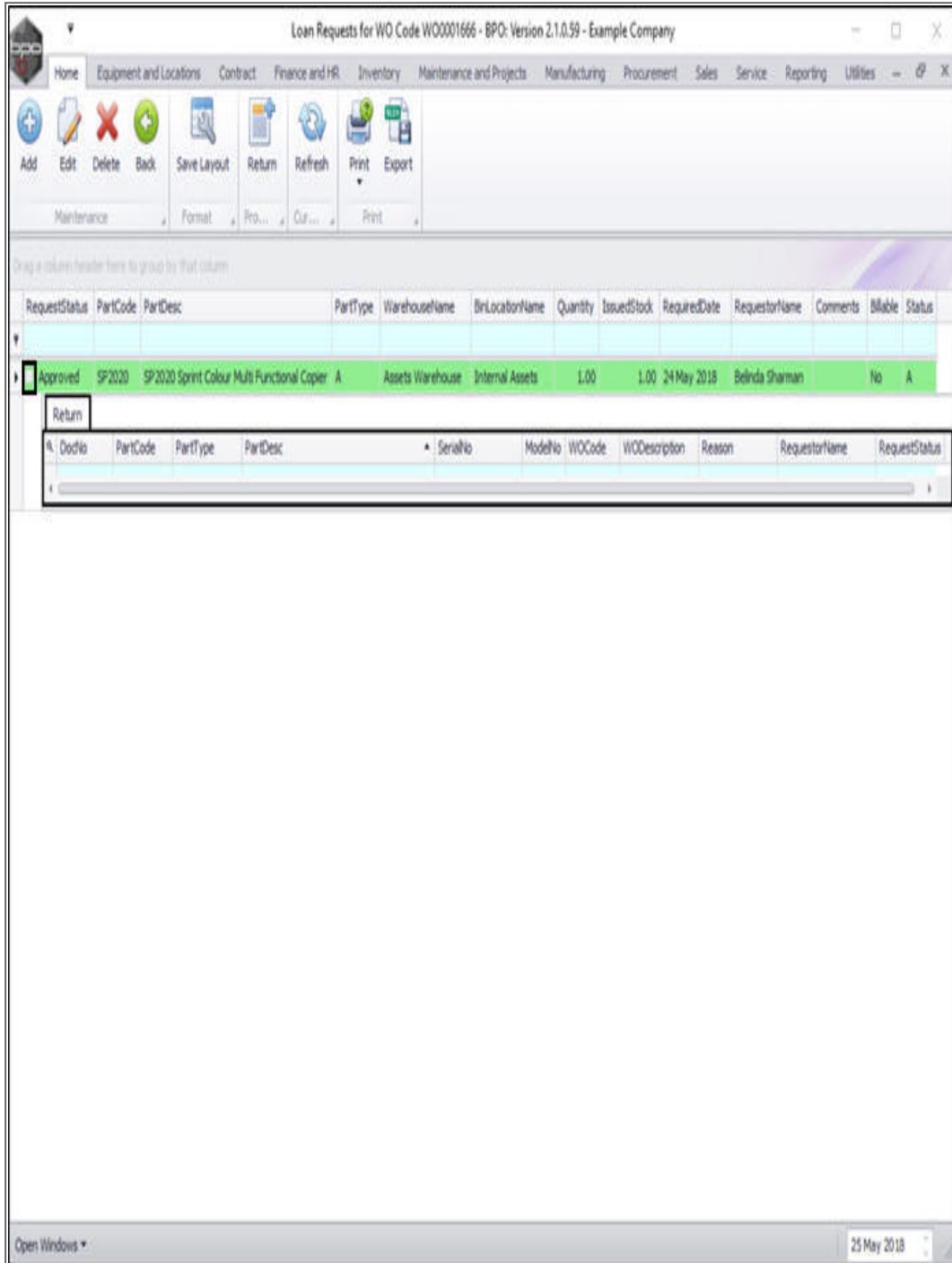
Contact : Julia Khoso	Shipping Address : Plot 91 Leaf Road
Customer : Hope Works	Forest Hills
	New Town
	Durban South

Code	Description	Serial No	Asset No	Quantity
SF0101	SF0101 Sprint Colour Multi-Functional Copier	A8910	A891010101	1.00
	Meter Description	Reading Date	Reading	
	Main meter	02 Jan 1900	0	
	Copier Meter	02 Jan 1900	0	
	AC Outlets	02 Jan 1900	0	

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.

- 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.



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 Pro... Cut... Print

Drag a column header here to group by that column

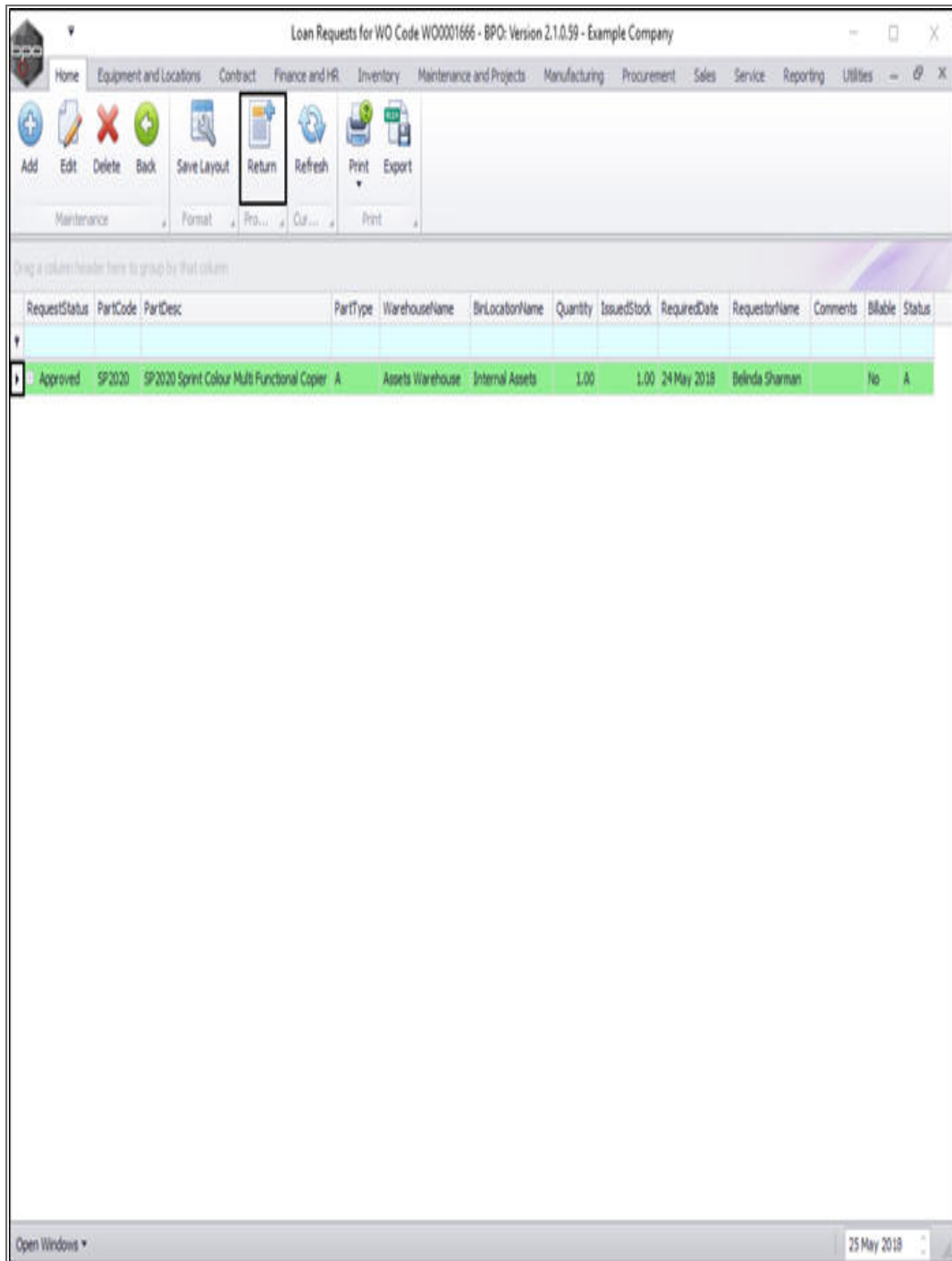
RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Bliable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A

Return

DocNo	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCODE	WODescription	Reason	RequestorName	RequestStatus
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Open Windows 25 May 2018

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



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

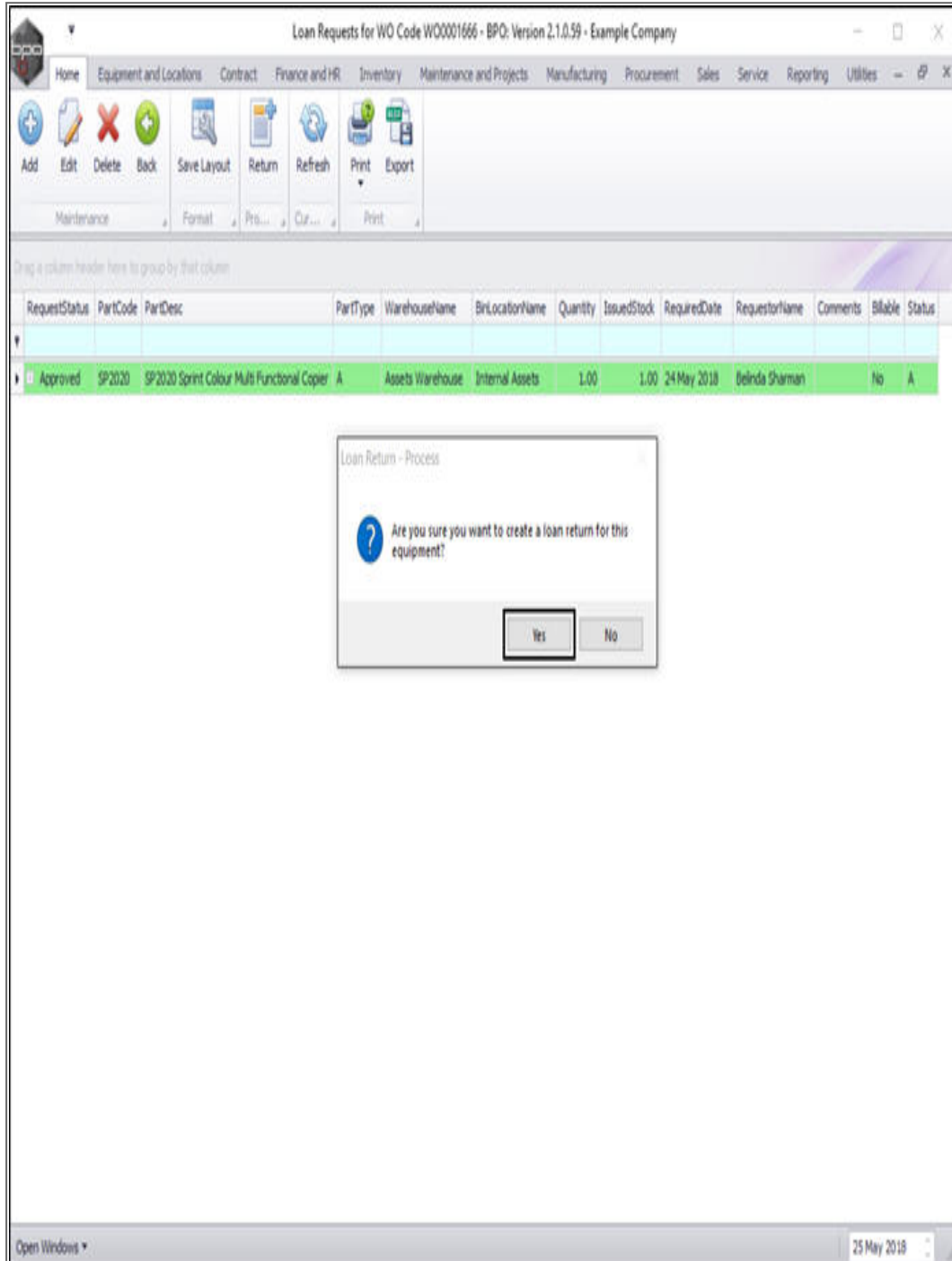
Add Edit Delete Back Save Layout **Return** Refresh Print Export

Drag a column header here to group by that column

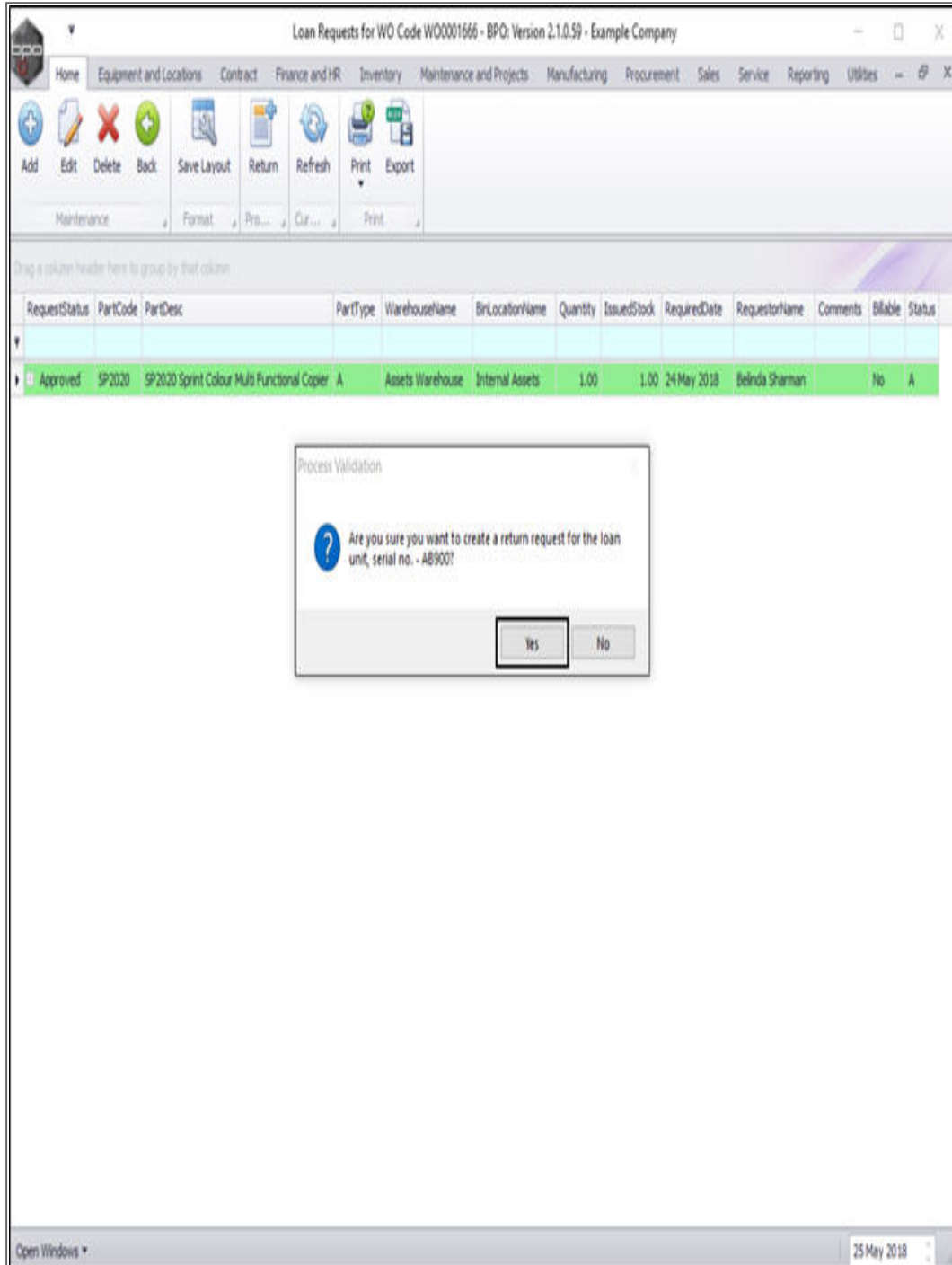
	RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Billable	Status
	Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharman		No	A

Open Windows 25 May 2018

- 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**.



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 Print

Drag a column header here to group by that column

RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Bivable	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

Process Validation

Are you sure you want to create a return request for the loan unit, serial no. - AB900?

Yes No

Open Windows 25 May 2018

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.

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 Sharnan		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**.

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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.

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 Pro... Cur... Print

Drag a column header here to group by that column

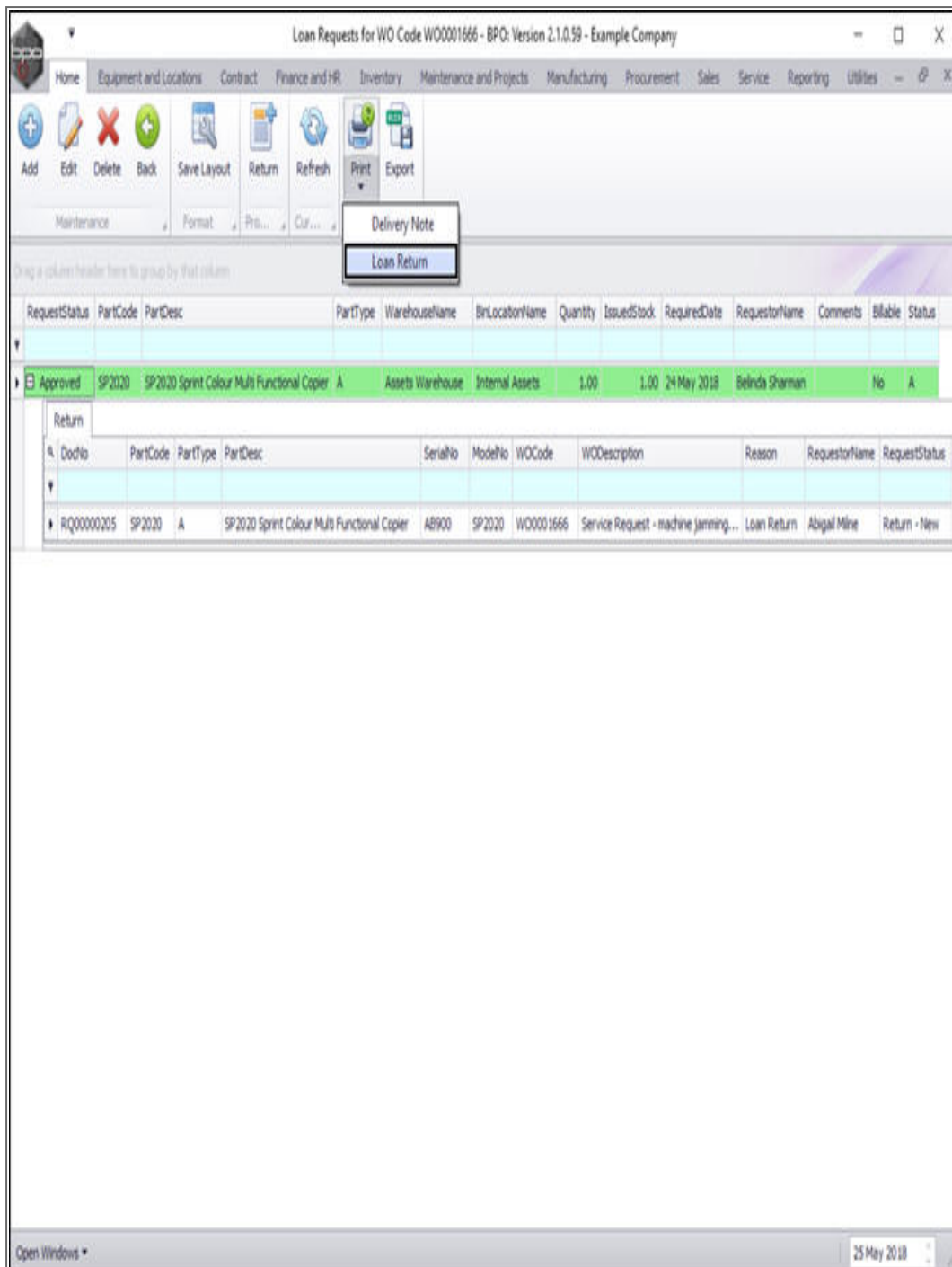
RequestStatus	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock	RequiredDate	RequestorName	Comments	Blable	Status
Approved	SP2020	SP2020 Sprint Colour Multi Functional Copier	A	Assets Warehouse	Internal Assets	1.00	1.00	24 May 2018	Belinda Sharnan		No	A

Return

DodNo	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCode	WODescription	Reason	RequestorName	RequestStatus
RQ000000205	SP2020	A	SP2020 Sprint Colour Multi Functional Copier	A8900	SP2020	WO0001666	Service Request - machine jamming...	Loan Return	Abigal Mine	Return - New

Open Windows 25 May 2018

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



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... Delivery Note Loan Return

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 Sharnan		No	A

Return

DocNo	PartCode	PartType	PartDesc	SerialNo	ModelNo	WOCode	WODescription	Reason	RequestorName	RequestStatus
RQ000000205	SP2020	A	SP2020 Sprint Colour Multi Functional Copier	AB900	SP2020	WO0001666	Service Request - machine jamming...	Loan Return	Abigail Mine	Return - New

Open Windows 25 May 2018

- 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 ***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.

Issue Loan Unit

Loan Unit Processing

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