

HIRE STOCK MANAGEMENT

ProCal-Track provides a facility to manage hire stock, with despatch, goods inwards and reporting capabilities for hire stock management

CREATING A HIRE INSTRUMENT STOCK ITEM

To create an instrument record for a hire instrument, simply use the normal goods inwards function to create a NEW instrument, complete all details (including accessories), then edit the record to mark as a hire instrument :

Create the instrument, then click BOOK IN

Edit the instrument by selecting it from the list (right hand side) then clicking the **View Full Job Sheet** button.

Edit Accessories For Model 3050

Job No. : J00001 Certificate Add. : TRANSMILLE LTD., UNIT 4 SELECT BUSINESS
 Instrument : Transmille 3050 Customer Add. : _____

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Job Number : J00001 Service Details | Hire Details | **Do Not Recall**

Date Received : 13/10/2010 Service Type : A : Calibration Only

Order Number : 1234 Cert. Type : B : Accredited Calibration

Invoice Number : _____ Quote Status : C : Go-ahead given

Despatch Date : _____ Quote No. : _____

Calibration Date : 13/10/2010 Service By : _____

Calibration Due : Not Available Warranty Mains Safety Fast T/R

Certificate No. : C00103

Status : A : With customer Turn-around : _____ Days Cal. Interval : _____ Weeks

Use : B : Hire Customer Comments -->

Booked in By : S.A. Hawkins

Set the **USE** field to **B – Hire** and then set the status to either **E – Received – Awaiting Cal.** (if calibration is required) or **S – In Stock** if this instrument is ready for hire.

Edit Accessories For Model 3050

Job No. : J00001 Certificate Add. : TRANSMILLE LTD., UNIT 4 SELECT BUSINESS
 Instrument : Transmille 3050 Customer Add. : _____

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Description : Multi Purpose Calibrator

Manufacturer : Transmille

Model Number : 3050

Serial Number : H1

Cust. Ref. : 3050HRE-1

Procedure No. : _____

PAT Test Code : _____

Site : Staplehurst

Department : Hire

Location : Stock

Cal. Source : _____

Date Acquired : _____

Date Scrapped : _____

Instrument Cost : _____

Instrument record details

Edit Accessories For Model 3050

Job No. : J00001 Certificate Add. : TRANSMILLE LTD., UNIT 4 SELECT BUSINESS
 Instrument : Transmille 3050 Customer Add. : _____

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Account Number :

Contact Name : J.A. BAILEY

Department Head : _____

Company Name : TRANSMILLE LTD.

Address : UNIT 4 SELECT BUSINESS CENTRE
 LODGE ROAD
 STAPLEHURST
 KENT. TN12 0QW. ME18 6DA

Telephone : 01580 890700 Site : Staplehurst

Fax : 01580 890711 Dept : Hire

email : sales@transmille.com Location : Stock

Tip : To add a new company name to the drop down list enter the details first, then click 'Add'

Instrument owner (hire company)

Edit Accessories For Model 3050

Job No. : J00001 Certificate Add. : TRANSMILLE LTD., UNIT 4 SELECT BUSINESS
 Instrument : Transmille 3050 Customer Add. : _____

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

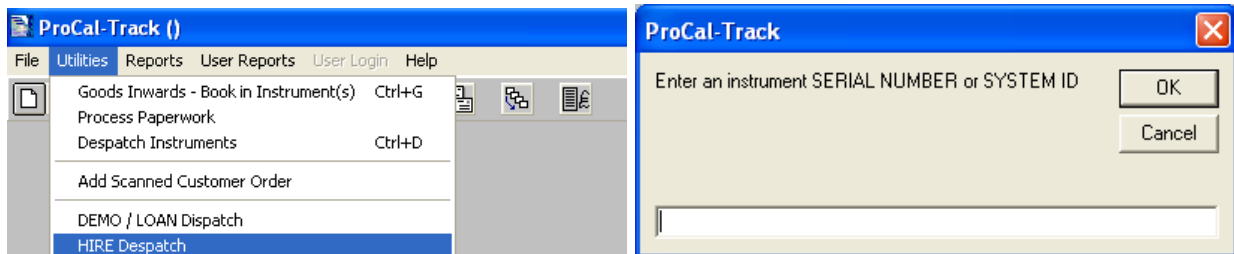
Job Number	Cert. Number	Calibration Date	Service Type	Calibration Type
J000001	C00103	13/10/2010	Calibration Only	Accredited Certificate

Instrument History (per hire)

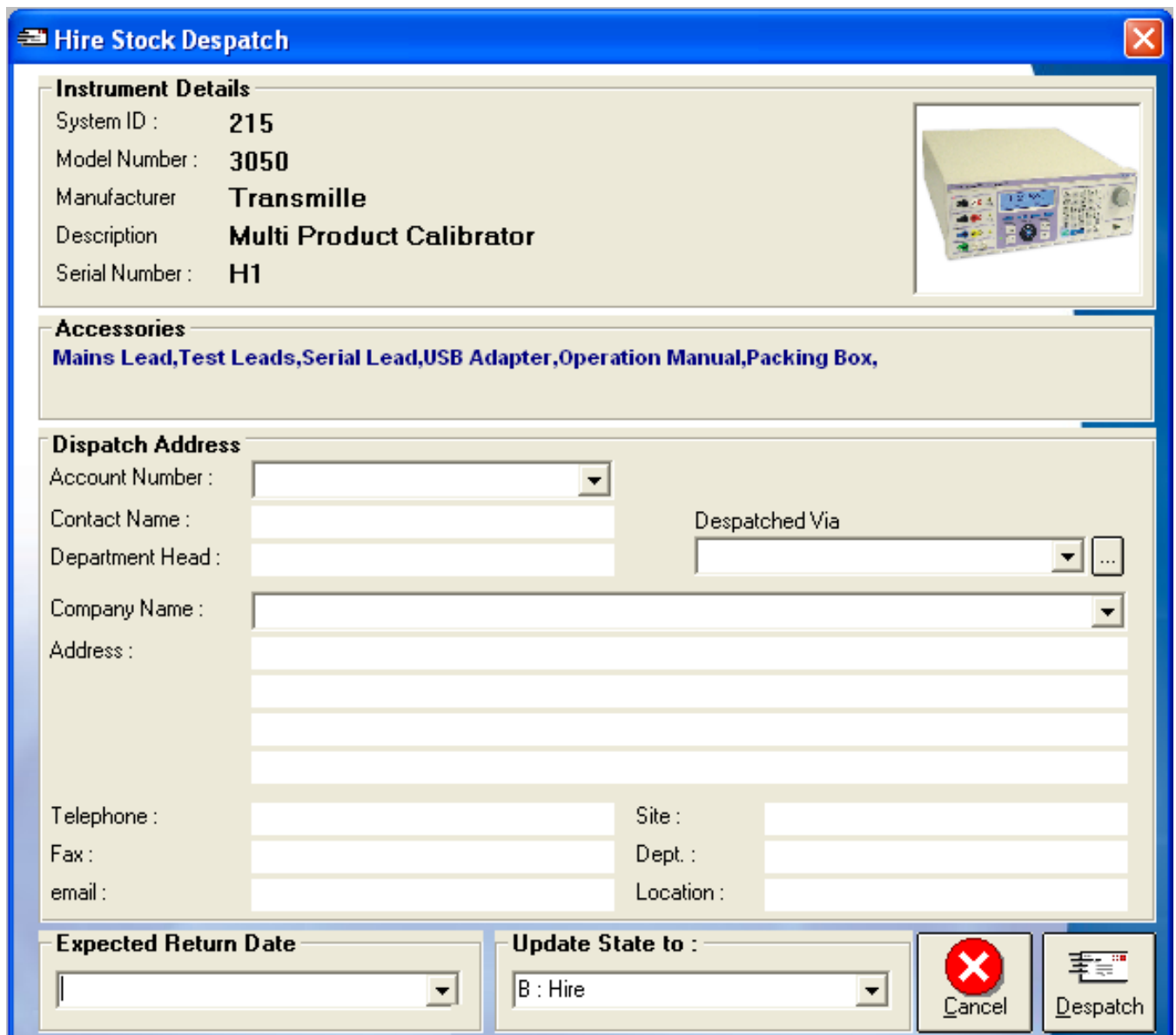
Once the instrument is set as a hire instrument and is 'In Stock' it can be hired out to a customer.

DESPATCHING A HIRE INSTRUMENT TO A CUSTOMER

ProCal-track has a dedicated function for despatching an instrument to a customer :



Simply enter a **SERIAL NUMBER** or **SYSTEM ID** for the instrument required to be sent out, and ProCal-Track will display the despatch screen :



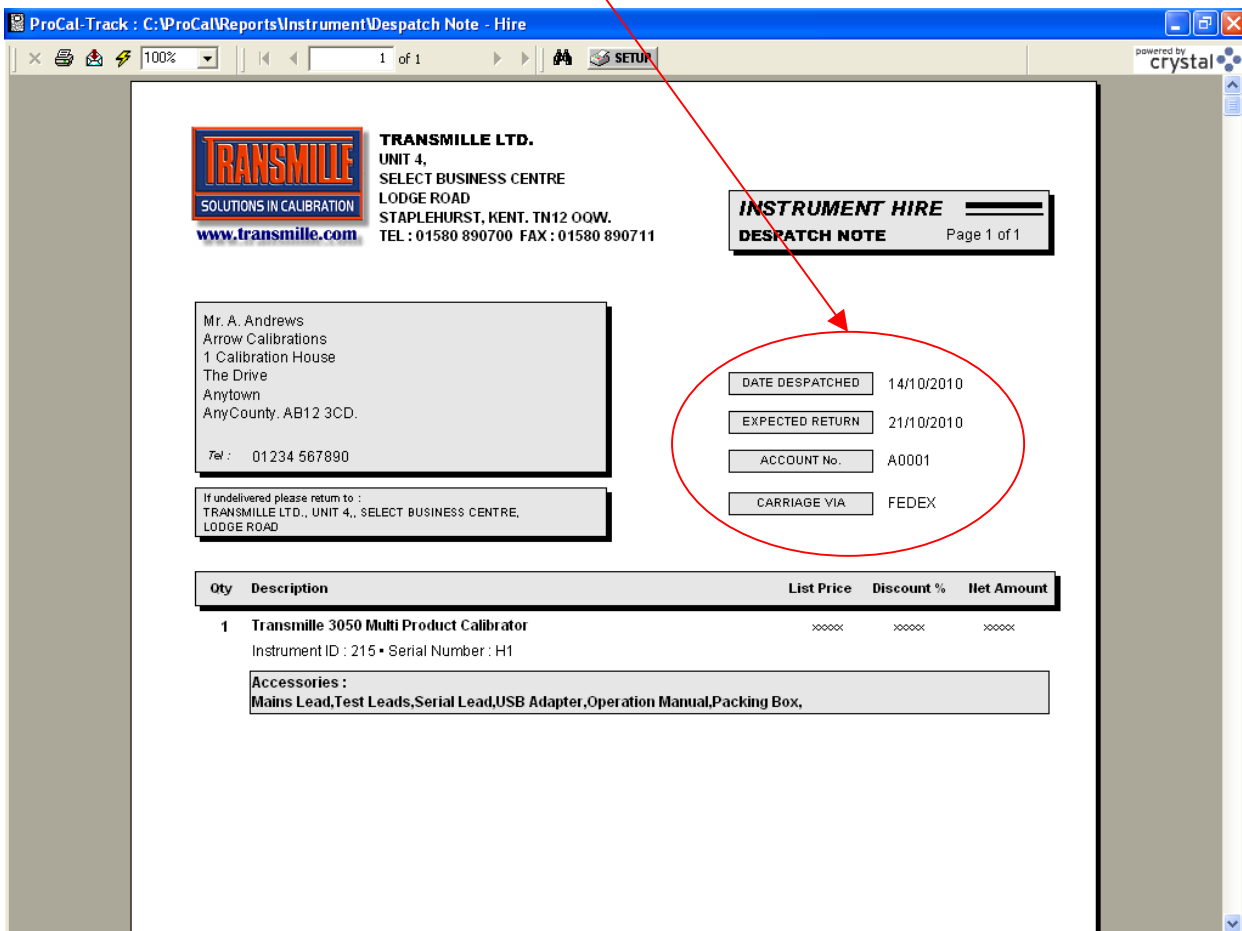
The despatch screen will display the instrument details, including the accessories which should be supplied with the instrument.

To despatch, enter the following information :

- > Customer name & address (or select from the drop down list)
- > Expected Return Date
- > Despatch method (eg. FEDEX. DHL etc)

Once all information is set, click the **Despatch** button.

A despatch note will be previewed on screen, detailing the instrument, accessories, carriage (shipping) method and also the required return date.



TRANSMILLE LTD.
UNIT 4,
SELECT BUSINESS CENTRE
LODGE ROAD
STAPLEHURST, KENT. TN12 0QW.
TEL : 01580 890700 FAX : 01580 890711

Mr. A. Andrews
Arrow Calibrations
1 Calibration House
The Drive
Anytown
AnyCounty. AB12 3CD.
Tel : 01234 567890

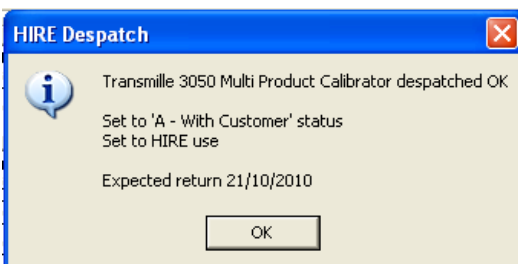
If undelivered please return to :
TRANSMILLE LTD., UNIT 4., SELECT BUSINESS CENTRE,
LODGE ROAD

INSTRUMENT HIRE
DESPATCH NOTE Page 1 of 1

DATE DESPATCHED 14/10/2010
EXPECTED RETURN 21/10/2010
ACCOUNT No. A0001
CARRIAGE VIA FEDEX

Qty	Description	List Price	Discount %	Net Amount
1	Transmille 3050 Multi Product Calibrator Instrument ID : 215 • Serial Number : H1	xxxx	xxxx	xxxx

Accessories :
Mains Lead, Test Leads, Serial Lead, USB Adapter, Operation Manual, Packing Box,



HIRE Despatch

Transmille 3050 Multi Product Calibrator despatched OK

Set to 'A - With Customer' status
Set to HIRE use

Expected return 21/10/2010

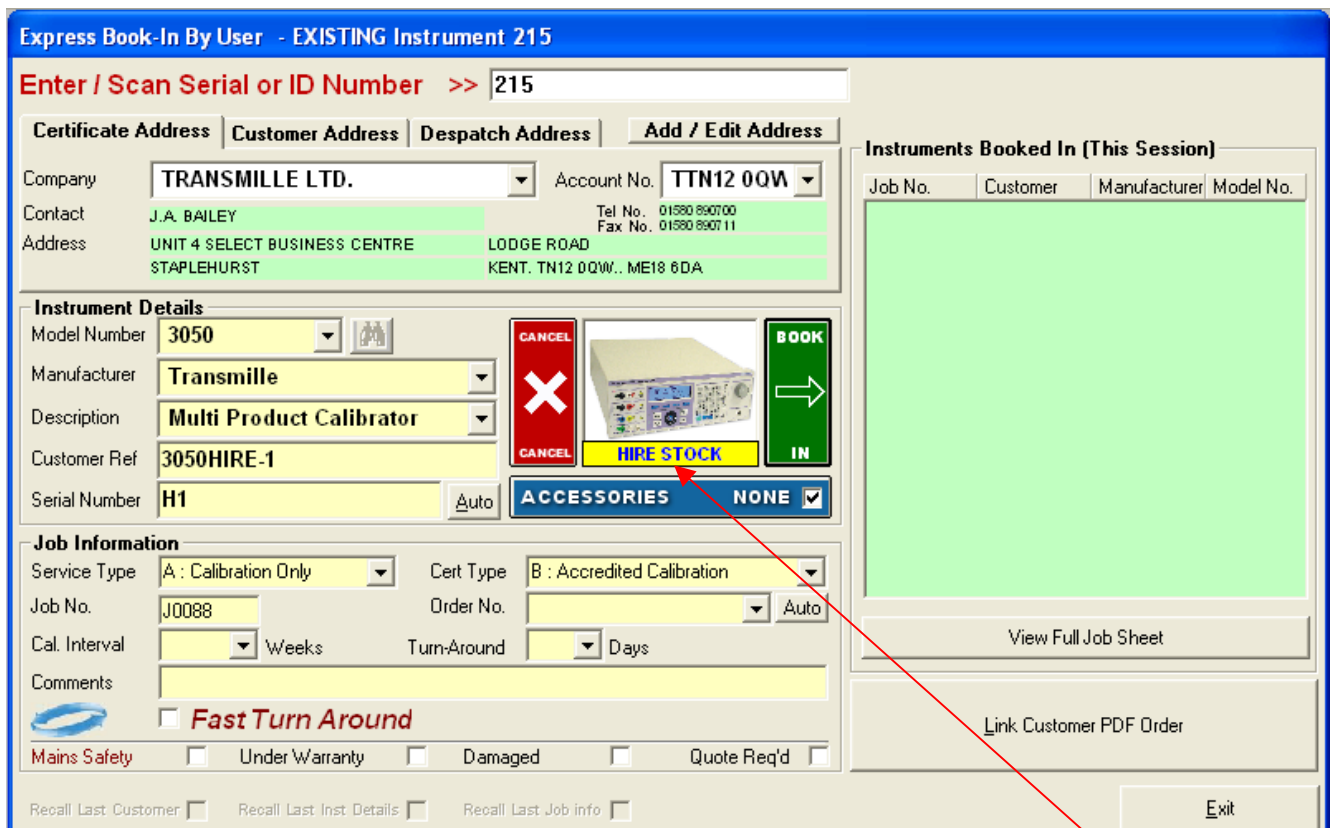
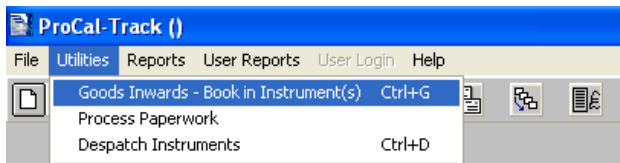
OK

A message will confirm despatch settings including Status, State (Hire) and the expected return date.

BOOKING IN A HIRE INSTRUMENT RETURNED BY A CUSTOMER

ProCal-Track uses a common Goods Inwards function to manage all instruments being booked into the system, whether it is for calibration, return from a sub contractor or return from hire.

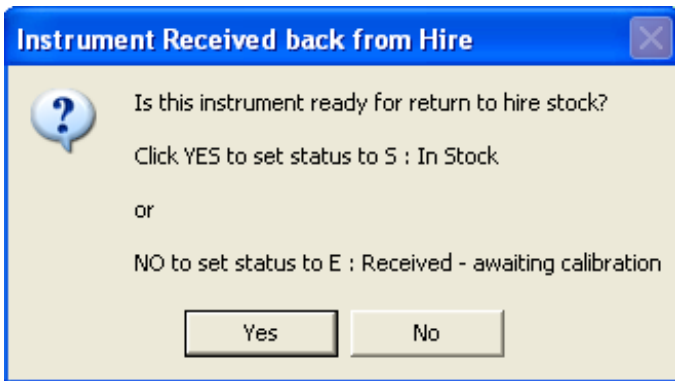
Simply select the ProCal-Track Goods Inwards function and enter the System ID or Serial Number of the instrument required to be booked in :



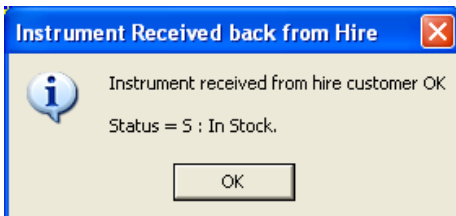
All Instrument information will be displayed, including a hire stock indication (in yellow) – simply confirm or edit any details as required, including selection of the accessories returned and then click **BOOK IN** to continue.

If ProCal-Track has identified this instrument as a HIRE instrument, it will ask the user if the instrument should be booked into the following statuses :

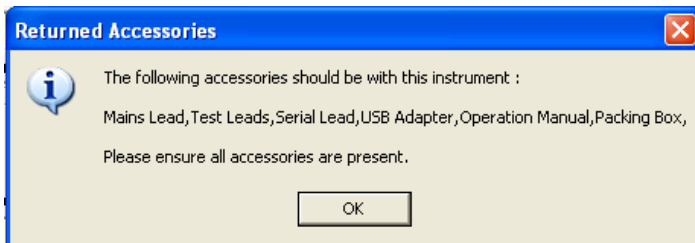
- > S : In Stock (no calibration / tests require before re-hiring the instrument)
- > E : Received – Awaiting Cal. (instrument requires calibration prior to re-hiring)



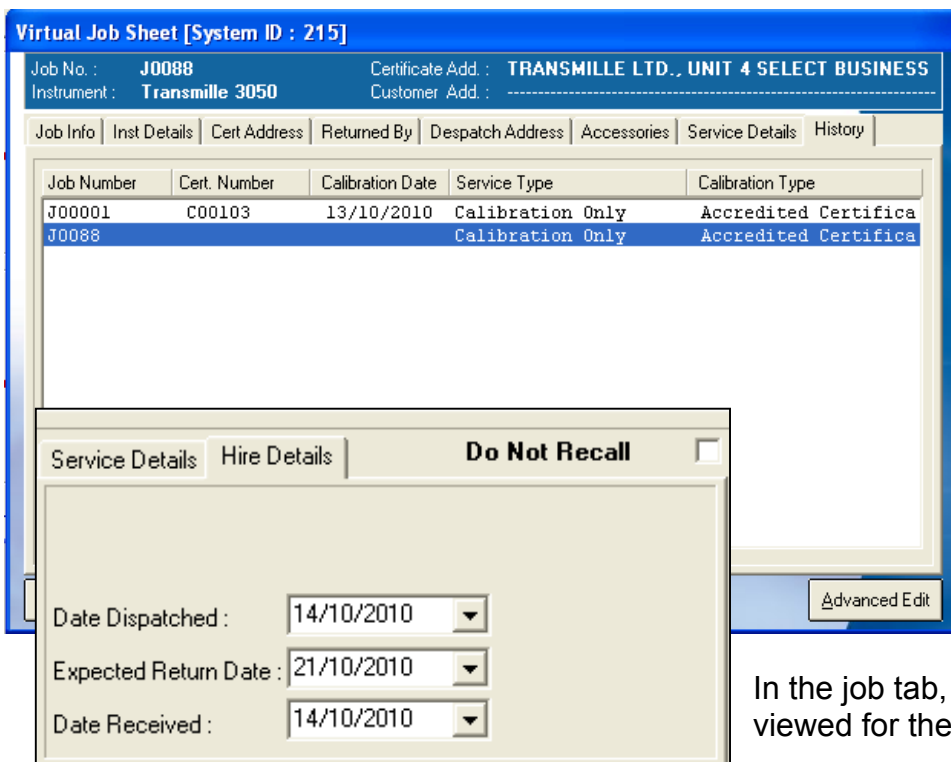
Simply click **YES** to set to status **S : In Stock** or **NO** to set to status **E : Received – Awaiting Cal.**



ProCal-Track will confirm the setting made – note these can be altered later if required by editing the instrument record.



A final reminder to check the Accessories have all been returned will also be displayed, with a list of accessories which were originally sent with the hired instrument :



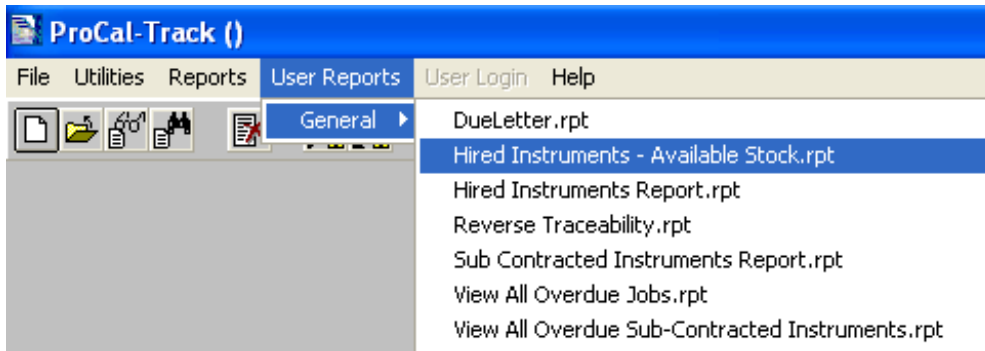
Once booked in the instrument will have a new 'event' created in its history, which preserves all information for each hire, allowing the user to view previous hires including the customer's the instrument was hired to and access ories sent etc..

In the job tab, hire dates can also be viewed for the instrument

MANAGING HIRED INSTRUMENTS : HIRED STOCK REPORTS

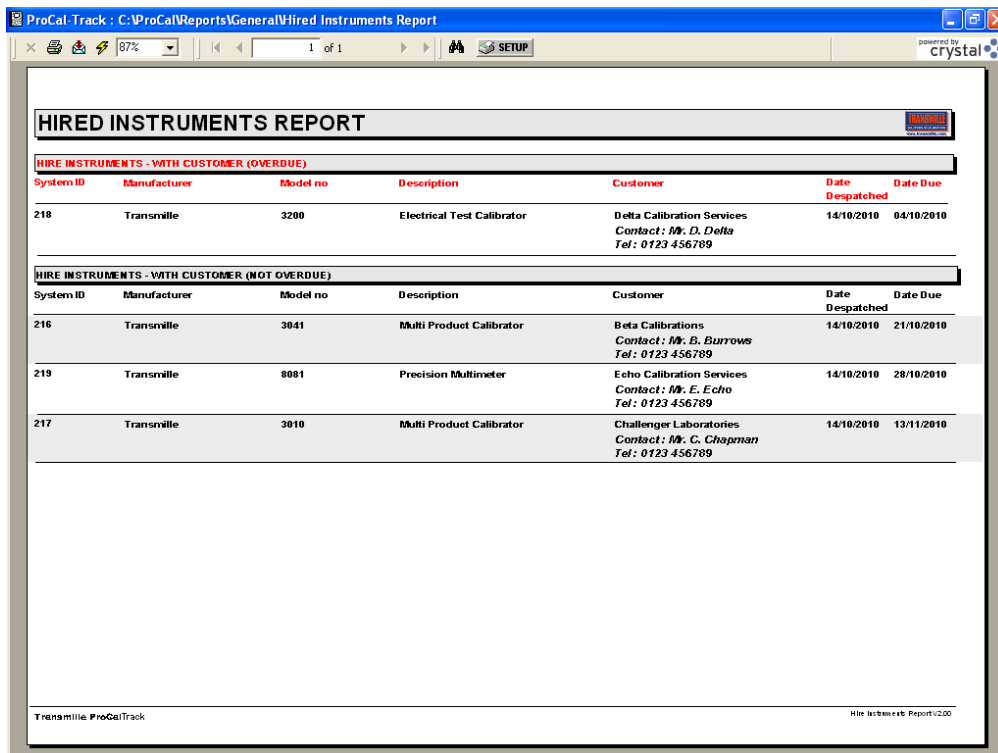
ProCal-Track uses several reports to provide overviews of stock available, already on hire and also due / overdue hired stock.

Using the Reports menu, the following reports can be run :



Report : Hired Instruments

This displays all instrument out on hire, with grouping by current and overdue hires :



HIRED INSTRUMENTS - WITH CUSTOMER (OVERDUE)						
System ID	Manufacturer	Model no	Description	Customer	Date Despatched	Date Due
218	Transmille	3200	Electrical Test Calibrator	Delta Calibration Services Contact: Mr. D. Delta Tel: 0123 456789	14/10/2010	04/10/2010
HIRED INSTRUMENTS - WITH CUSTOMER (NOT OVERDUE)						
System ID	Manufacturer	Model no	Description	Customer	Date Despatched	Date Due
216	Transmille	3041	Multi Product Calibrator	Beta Calibrations Contact: Mr. B. Burrows Tel: 0123 456789	14/10/2010	21/10/2010
219	Transmille	8081	Precision Multimeter	Echo Calibration Services Contact: Mr. E. Echo Tel: 0123 456789	14/10/2010	28/10/2010
217	Transmille	3010	Multi Product Calibrator	Challenger Laboratories Contact: Mr. C. Chapman Tel: 0123 456789	14/10/2010	13/11/2010

Report : Hired Instruments – Available Stock

This displays all instruments available for hire, with grouped by model :

System ID	Manufacturer	Model no	Description	Date Despatched	Date Due
215	Transmille	3090	Multi Product Calibrator		

MANAGING HIRED INSTRUMENTS : SEARCHING FOR HIRE INSTRUMENTS

Using the built-in Procal-Track search functions, hire stock can be searched for under many parameters (eg. Model number) :

Simply select **File -> View / Edit an Instrument** and set USE to HIRE. Then add any other search parameter to create a custom search using whichever search parameter is required.

For example to find all 3041 calibrators available for hire, set
Use = B,
Status = S : In Stock
Model = 3041