



EventOutputID = 177 Equipment Return To Lease Tracking

This process is meant to assist you with tracking equipment picked up from customers that are to be returned to leasing company at some point in time. Using the steps below you will receive a report (at your schedule...weekly, monthly, etc) of all the equipment with the specified STATUS' you create for these returns (we search where status "contains" the string of characters you specify in our subscription for VariableW) showing you the original customer, the leasing company to be returned to, and the date due.

The we have an additional alert (#297) that will send you an email for each leasing company associated with these records showing you the Model/Serial#/CustomerName that are due within the next (VariableW) days (and it will include all past due or "missing returndate" equipment).

RECOMMENDED PROCESS STEPS:

- 1) Create the status you will assign to the equipment while it's in this LeaseHold/Return To Lease state (Tools – Options – Lists And Codes – Equipment Status). You can have multiple status codes you use to assign to all equipment that you want this alert process to track, however they all must start with a unique set of Characters in common. In our example we used "LeaseReturnHold", and we change the host equipment records to this status once we've picked up the equipment. But you could have (LeaseReturnHold, LeaseImmediateReturn, etc) and notice all have "Lease" as part of the status code, so you would put "Lease" depending on how often you want to "touch" these lease return machines)
 - a. NOTE: We also pickup equipment that we did not sell from our inventory, and in that case we create a Generic Item/Model for each manufacturer (one model..Toshiba Generic/ Konica Generic / etc) and we create an equipment record in e-automate for those machines we pick up to return on behalf of our new client at the designated time. You should do the same so that you can have a record in e-automate to track. We do NOT put these return to lease equipment back into our inventory regardless of whether or not we sold the original equipment or not..!! We use the service equipment file(which can have equipment records that were NOT NOR EVER WILL ever be tied to inventory)
- 2) Create the necessary custom property attributes you want to track as part of your return process. Below are probably the most common:

- a. An attribute lookup to designate who the customer the equipment was picked up from.

Edit Attribute

Attribute name: * LRCustomer

Description: Customer Equipment coming in from

Data type: * Lookup

Lookup type: * Customers (Name)

Active

OK Cancel

- b. An attribute to record the Date you received it back from customer

New Attribute

Attribute name: * LRDateReceivedIn

Description: Date Equipment was received back

Data type: * Date

Active

OK Cancel Apply

- c. An attribute to record the Leasing Company to return the equipment to

New Attribute

Attribute name: * LRLeaseCompany

Description: Leasing Company to Return Equipment to

Data type: * Lookup

Lookup type: * Customers (Name)

Active

OK Cancel Apply

- d. An attribute to record the Date the Equipment needs to be returned

Edit Attribute

Attribute name: * LRTargetReturnByDate

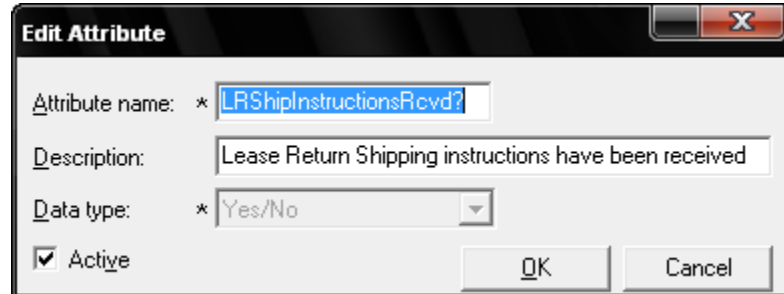
Description: Date Equipment Due back to Leasing company

Data type: * Date

Active

OK Cancel

- e. An attribute to record that Shipping / RA instructions have been received



The screenshot shows a dialog box titled "Edit Attribute". It contains the following fields and controls:

- Attribute name:** * LRShipInstructionsRecvd?
- Description:** Lease Return Shipping instructions have been received
- Data type:** * Yes/No (dropdown menu)
- Active
- Buttons: OK, Cancel

Next you'll need to assign those custom properties to a new custom configuration that will be used on Equipment ONLY when the equipment is removed from the field and to be returned to the leasing company. This instance is an example of the rare times you will override any existing custom property configuration assigned to a record with a new custom property configuration (when you change the custom property configuration used on a record type from one to a new one, all values on the original custom property tab for that original configuration are lost!!). This new custom property configuration will contain only the attributes you create above necessary to track the lease return information.

3) Under Tools – Lists and Codes – Custom Configurations

In the example below, we created a configuration called "ReturnToLease" and assigned it to the Equipment Group, then we assigned the attributes we built above below to that new configuration.

Edit Tracking Configuration (List)

Name: *

Description:

Group:

Selected attributes:

Attribute ▲	Description	Required ▲
LRCustomer	Customer Equipment coming in from	
LRDateReceivedIn	Date Equipment was received back	
LRLeaseCompany	Leasing Company to Return Equipm...	
LRShipInstructionsRcvd?	Lease Return Shipping instructions ...	
LRTargetReturnByDate	Date Equipment Due back to Leasi...	
S.9.2 Lease Number	Lease Number associated with this ...	

Available attribute(s) Default value

So, the first alert #177 is to send you a report listing all equipment that have the status you specify in VariableW.

The process is then controlled thru a combination of alerts to monitor missing information or on the TargetReturn Date, you should be able to accurately track and return back to the leasing companies the equipment in time to avoid the equipment/lease going into renewal automatically.