

Bernina Service & Repair

Loaner Pool Management Guide

Purpose: The Loaner Pool allows dealers to provide temporary replacement machines to customers while their machine is being serviced or repaired, ensuring minimal disruption to their sewing, embroidery, or quilting activities.

1. Loaner Pool Setup

Each loaner machine is maintained in **Service & Repair** → **Loaner Pool**.

- **Asset Tag** (Required)
- Make
- Model
- Serial Number
- Status
- Condition Note

2. Loaner Pool Dashboard

Navigate to: **Service & Repair** → **Loaner Pool**

- **+ Add Loaner** – Create a new loaner record.
- **Run Overdue Notifications Now** – Immediately send notifications for overdue loaners.
- Filter loaners by status to quickly locate available or checked-out units.

Example Grid View

Asset Tag: LOANER-TEST-01
Make / Model: Loaner City Bike
Serial: LN-0001
Status: Available
Out On: —
Expected Back: —

Grid Information Displayed

- Asset Tag
- Make / Model
- Serial Number
- Current Status
- Date Checked Out
- Expected Return Date

3. Loaner Check-Out Process

- 1 Select an available loaner from the Loaner Pool.

- 2 Set the expected return date.
- 3 Record a security deposit if required.
- 4 Add condition notes documenting the loaner's state.
- 5 Capture and store check-out photos.
- 6 Add internal notes or customer acknowledgements.

Result: The loaner becomes linked to the customer and work order, and its status is updated automatically.

4. Loaner Check-In Process

- 1 Record the returned condition.
- 2 Add updated condition notes.
- 3 Capture return photos.
- 4 Release any customer deposit.
- 5 Apply charges for damage or missing items when necessary.

Note: Loaners can be checked in regardless of the repair status of the original work order.

5. Overdue Loaner Tracking

- Loaners exceeding the expected return date are flagged as overdue.
- Staff can quickly identify overdue units within the Loaner Pool.
- Overdue notifications can be sent automatically or manually.
- Use **Run Overdue Notifications Now** to immediately notify customers.
- Review overdue customers, loaners, and return dates from a central location.

Key Benefits

- Improved customer service during repairs.
- Complete visibility into loaner inventory.
- Better accountability through condition tracking and photos.
- Reduced loss through overdue monitoring and notifications.