

# EQUIPMENT

## INTRODUCTION TO ASSETS

In BPO an asset can be:

1. An **Internal Asset**: This is an item that would be owned by a company and can be used as a device to generate revenue through rental. This will have been a serialised stock item that has been **converted into an asset** prior to rental.
2. A **Customer (Client) Asset**: This is where a customer has purchased a serialised stock item and is currently the owner of said item.

Note:

- A **serialised stock item** is not an asset, it is an item in store, ready to be sold, without a rental or service agreement. It only becomes an asset when **converted from a stock item**. Once an item is sold (and invoiced), BPO will 'move' it into the Customer Asset Warehouse, ready to attach a contract to it, if necessary, for servicing.
- The BPO **Asset Listing** screen contains a data grid of all type of items; Client Machines, Internal Assets and Serialised Stock but the latter are not actually 'assets' until the above-mentioned conversion.

Criteria for an asset would be:

- i. A **unique** serial number
- ii. Scheduled **task planning**
- iii. Traceability (**movement history**, etc.)
- iv. **Contract Items**

---

**Ribbon Access:** *Equipment and Locations > Assets*

---



1. The Asset listing or ***Machine List for [Site]*** screen will be displayed.
2. The data grid will list all the serialised items currently on the system.
3. This screen will open with the ***Site*** filter set to your default site as configured on your User setup.



For a detailed handling of this topic refer to Site Selection.

The ***Status*** filter will be set to ***All***.



For a detailed handling of this topic refer to State/Type Selection.



1. Click on the ***drop-down arrow*** to view the Site filter menu.



Selecting a specific Site will filter the data grid to display only the items linked to that Site.

2. In this image ***Durban*** has been selected.



## THE ASSET TYPE FILTER

By default, the ***Asset Type*** or ***Status*** filter in this screen is set to view ***All*** serialised items.

1. Click on the ***drop-down arrow*** to view the Status filter menu:
  - **Client Machines:** View serialised items that ***belong to customers***.
  - **Internal Assets:** View serialised items that ***belong to the company***, e.g. internal rental machines

- **Serialised Stock:** View serialised items *in stock ready for sale*.



Selecting a specific Status will filter the data grid to display only the items with that particular Status description.

2. In this image the status has been kept as **All**.



## ASSETS ACTION BUTTONS

---

### MAINTENANCE

---

From this screen, you can:

- [Add](#) an Asset
- [Edit](#) an Asset
- [Delete](#) an Asset
- [View](#) an Asset:
  - [View Client Machine](#)
  - [View Internal Asset](#)
  - [View Serialised Stock Item](#)



### PROCESS

---

- [Revalue](#) an Asset
- [Convert](#) an Asset
- [Buy Back](#) an Asset



## PRINT

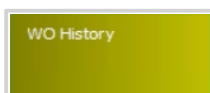
- The following **Asset Reports** can be printed from this screen:
  - [Depreciation Report](#)
  - [Depreciation Summary](#)
  - [Period Depreciation](#)
  - [Equipment Listing](#)
  - [Asset Register](#)
  - [Move History](#)
  - [Scan History](#)
  - [Equipment Detail](#)
  - [Service History](#)



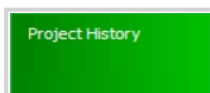
## ASSET FUNCTIONS TILES

On the left side of the **Machine List for []** screen is the **Links** panel which contains the Asset **Functions** and **Processing** tiles. Each tile, when clicked on, will take you to further information concerning the selected asset.

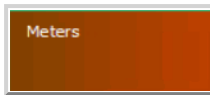
**Important Note:** When working from the **Asset Listing** (Machine List for Site) screen, ensure that you have selected the correct asset before you click on any tile.



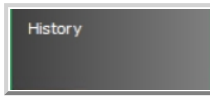
The **WO History** tile will direct you to the [Work Orders for machine](#) screen, where you can *Add, Edit, Delete, View, Close, and Complete* a work order linked to the asset.



The **Project History** tile will direct you to the [Project Listing for equipment](#) screen, where you can *Add, Edit, Apply a Project Methodology or Adjust Project Baseline*, as well as maintain *Employee and Project Time*.



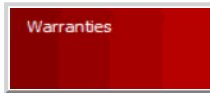
The **Meters** tile will direct you to the [Meter Listing for Serial No.](#) screen, where you can *Add*, *Delete* or *Reset* a meter reading linked to the asset.



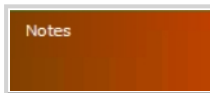
The **History** tile will direct you to the [Transaction History for Equipment](#) screen, where you can view a history trail of the *Valuation*, *Transactions* and *Movement* of an asset.



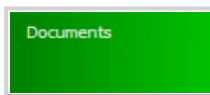
The **BOM** tile will direct you to the [BOM Listing for equipment](#) screen, where you can *Add*, *Delete* and *View* BOMs linked to the asset.



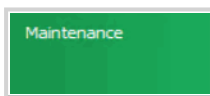
The **Warranties** tile will direct you to the [Warranties for Equipment](#) screen, where you can *Add*, *Edit* and *View* warranties, and *Warranty Claims* linked to the asset.



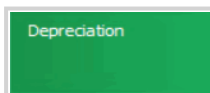
The **Notes** tile will direct you to the [Note Listing for Serial No.](#) screen, where you can *Add* a note linked to the asset.



The **Documents** tile will direct you to the [Documents for Equipment](#) screen, where you can *Add*, *Edit* and *Delete* digital documents linked to the asset.



The **Maintenance** tile will direct you to the [Maintenance Methodology for Asset](#) screen., where you can *Add*, *Edit* and *Delete* maintenance methodologies linked to the asset.



The **Depreciation** tile will direct you to the [Asset Depreciation](#) screen, where you can *View* the current period and depreciation date.

BPO.MNU.007

