

EQUIPMENT

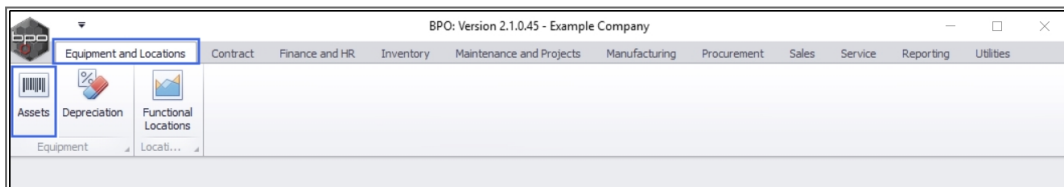
ASSETS - EDIT - ASSET DETAILS

After an asset is created, you may wish to edit certain attributes and details of the asset. Only certain asset details can be edited. You may have [user security rights](#) set in your [company configuration](#) whereby a control may be applied to these editing rights. For example, only a manager can edit certain details, for example, *incorrect serial number input* (which affects stock reports) but an administrator can edit other less impactful details.

It is important to note that if the serial number is edited for a company asset, all stock reports will be affected.

Explanations for all the **Details** and **Finance** fields can be found in [Introduction to Assets](#).

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



The ***Machine List for [Site]*** screen will open.

1. The screen will open with the default ***Site*** setting configured on the user.



Refer to [Site Selection](#) for more information about Site settings.

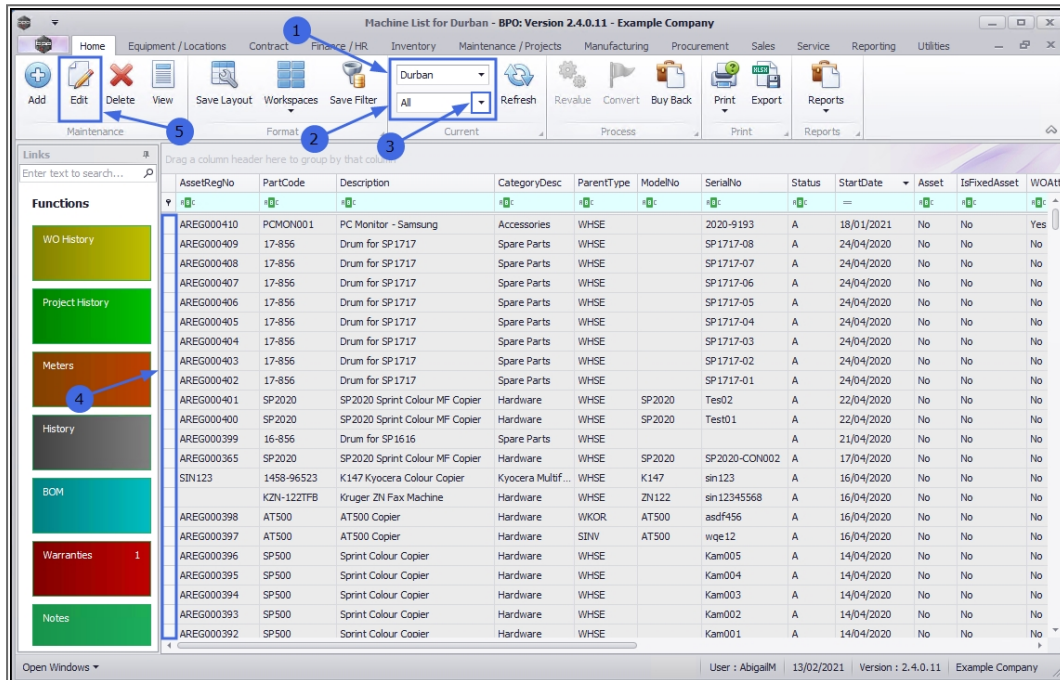
2. By default, this screen will open with the ***Type*** filter set to '***All***', listing all of the assets on the system (Customer Assets, Internal Assets and

Serialised Stock Items).

- You can click on the **drop-down arrow** in the **Type** field and select an alternative Type, (such as Client Machines), if required.

SELECT ASSET TO BE EDITED

- Select the **row** of the **asset** where you wish to **edit** the details.
- Click on **Edit**.

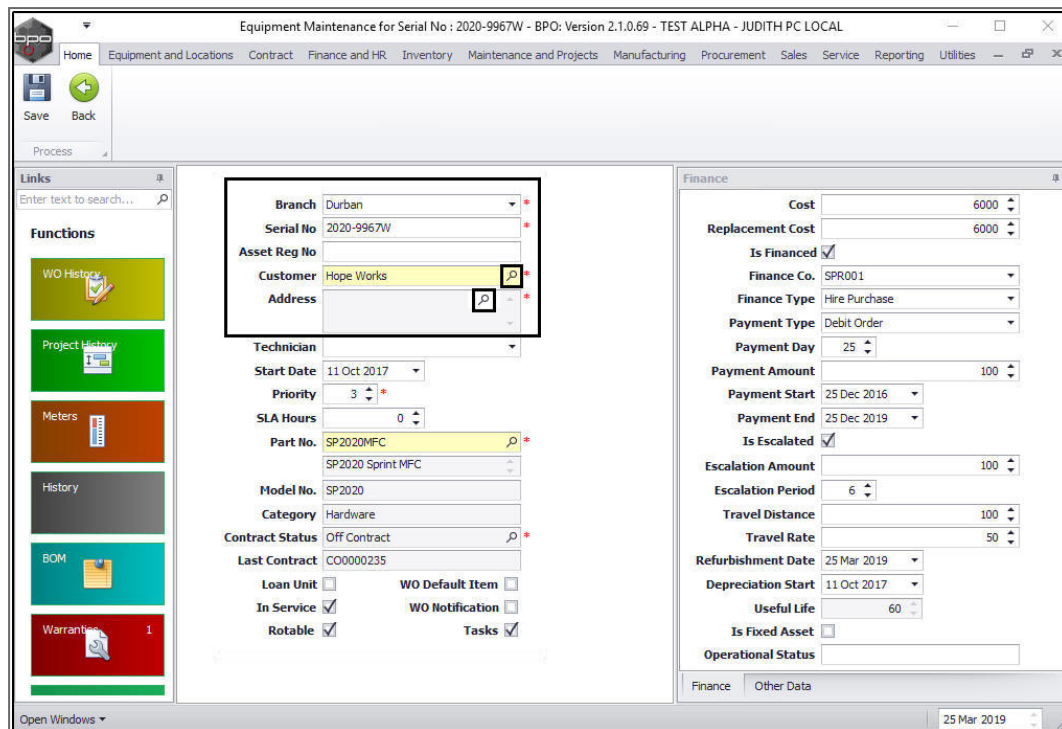


ASSET DETAILS

There should be no need to change these details if they were correctly entered when the asset was added to the system. However, if necessary, there are some details which can be edited depending on whether you are trying to edit a Customer Asset, an Internal Asset, or a Serialised Stock Item. Remember, if your company has **security rights** configured then you may not be able to edit some, or even all, of these details.

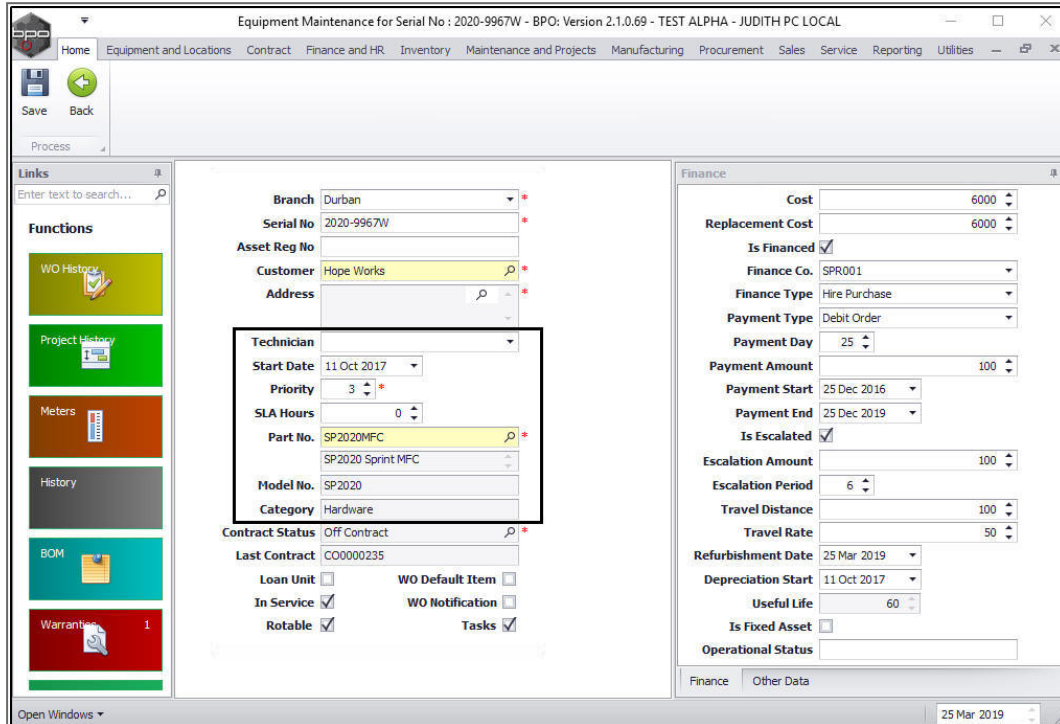
- **Branch:** Click on the *drop-down arrow* and select an alternative branch from the drop-down menu, if required.
- **Serial No:** Type in an *alternative* serial number, if required.
 - **Important Note:** If the serial number is edited for company assets, all stock reports will be affected.
- **Asset Register No:** Type in an *alternative* asset register number, if required.
- **Customer:**
 - i. If this is a Customer Machine you can click on the search icon and select an alternative customer from the '*Select a customer for this contract*' pop up screen, if required.
 - ii. If this is an Internal Asset, this field will be blank and cannot be edited, as this is a company owned asset.
 - iii. If this is a Serialised Stock item, this field will be blank and cannot be edited, as this is a company owned asset.
- **Address:**
 - i. If this is a Customer Machine you can click on the search icon and select an address from the '*Select an address for this machine*' pop up screen, if required.
 - ii. If this is an Internal Asset, this field cannot be edited.
 - iii. If this is a Serialised Stock item, this field cannot be edited.

A new company config flag ([AutoUpdateShippingAddress](#)) is available in BPO2 v2.5.0.8 (or higher) to control automated shipping address updates in BPO2 between contract items and equipment shipping addresses/ functional location shipping address and ensures the shipping address correlates to contract items shipping address. When you update the shipping address on a contract the shipping address will reflect on the asset or functional location. If the user updates the asset or functional location's shipping address, the shipping address will reflect on the contract item.



- **Technician:** Click on the drop-down arrow and select an alternative technician from the '*Technician Name*' drop-down menu, if required.
- **Start Date:** Either type in or click on the drop-down arrow and use the calendar function to select an alternative date, if required.
- **Priority:** Either type in or click on the arrow indicators and select an alternative priority number, if required. This is the work order priority of the customer machine service / repair. 1-5 (1 = most important, 5 = least important)
- **SLA Hours:** Either type in or click on the arrow indicators and select an alternative **SLA Hours** amount, if required.
- **Part No:** Click on the search icon and select from the '*Select a part to configure the supply info*' screen, an alternative part number, if required.

- **Model:** This will auto populate according to the Part No. selected above.
- **Category:** This will auto populate according to the Part No. selected above.



ASSET LOCATIONS

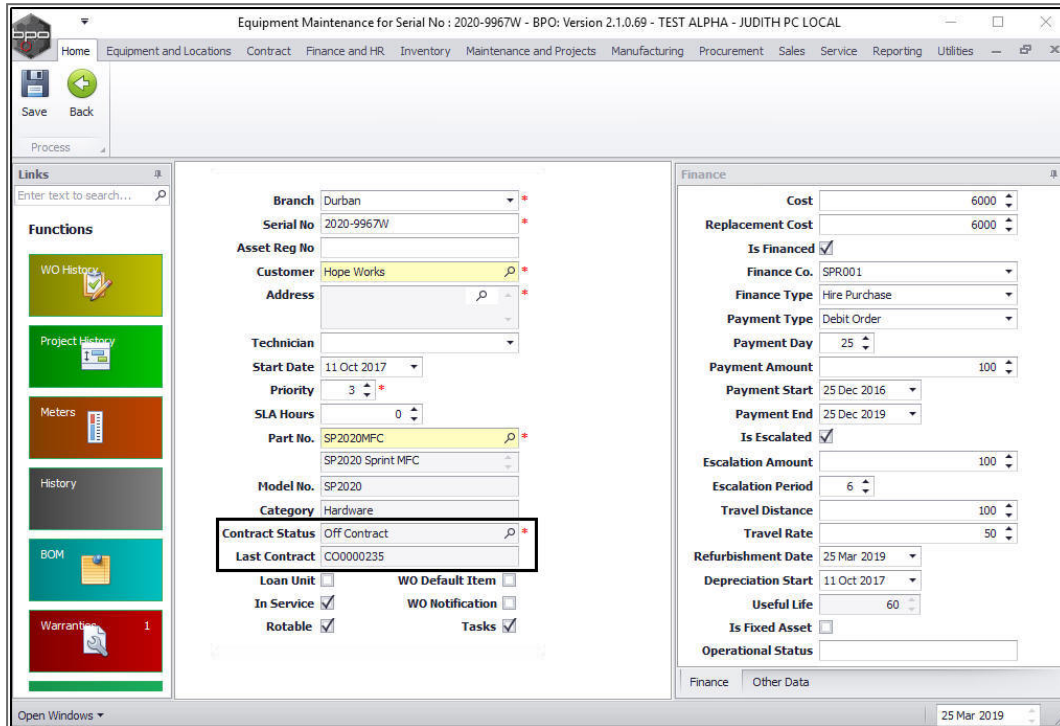
ASSET RECENTLY LINKED TO A CONTRACT

(This is an asset which was linked to a contract but is now removed.)

- **Contract Status** and **Last Contract:** These fields will only be displayed if the item has recently been attached to a Contract but is currently removed from that contract. The **Parent Type** of the item is CTRT.
 - **Contract Status:** This will populate with 'Off Contract'

- **Last Contract:** This will populate with the last contract number that this item was linked to.

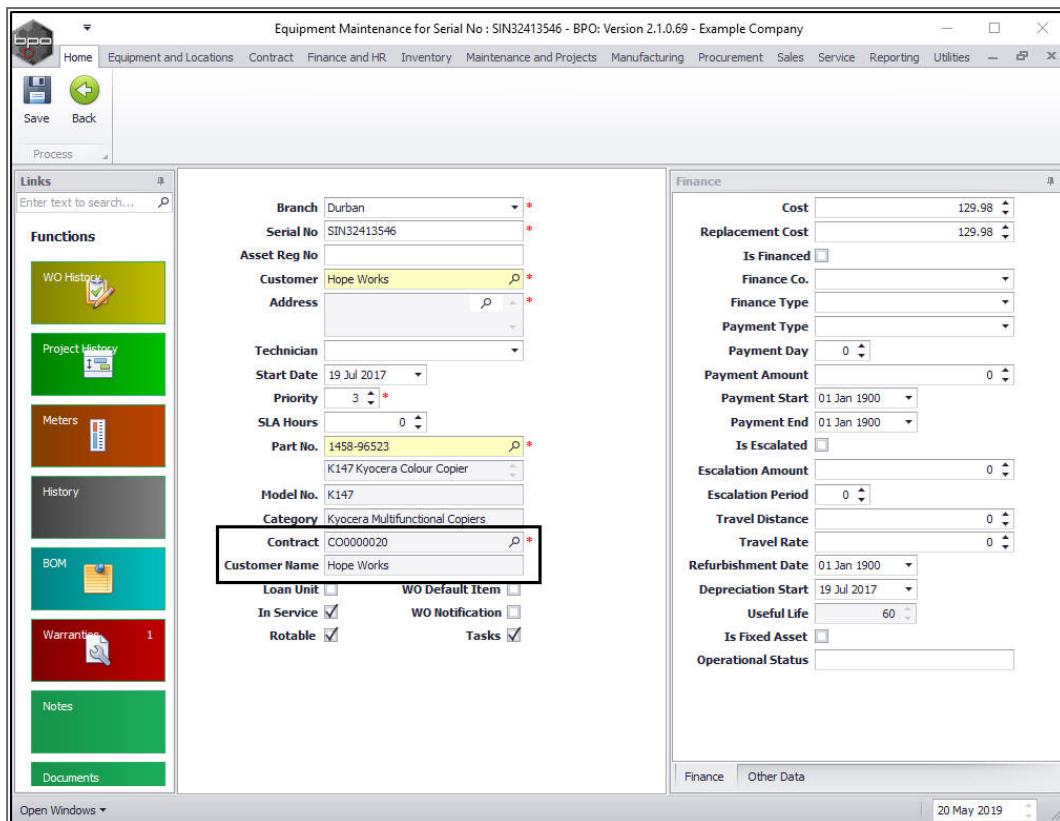
These fields cannot be edited.



ASSET CURRENTLY LINKED TO A CONTRACT

- **Contract** and **Customer Name:** These fields will only be displayed if the item is currently attached to a **Contract**. The **Parent Type** of the item is CTRT.
 - **Contract:** This will auto populate with the contract number that the item is linked to.
 - **Customer Name:** This will auto populate with the name of the customer linked to the contract no. above.

These fields cannot be edited.



ASSET LINKED TO A SALES INVOICE

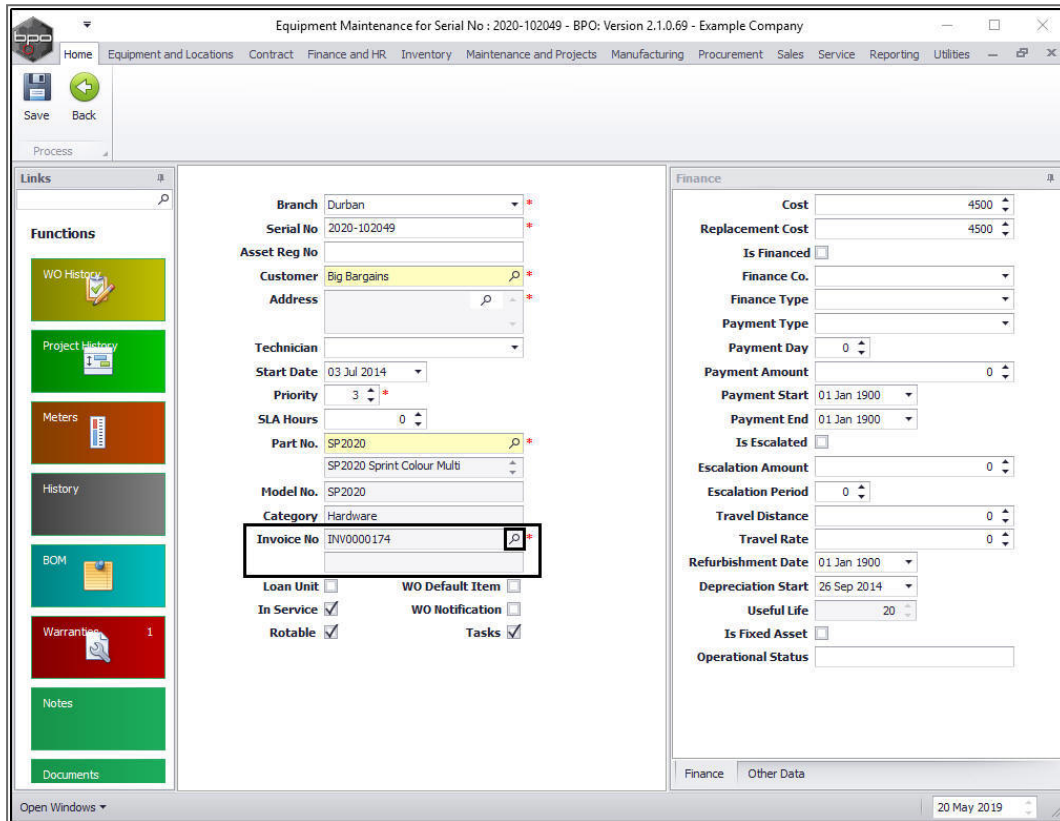
- **Invoice No:** This field will only be displayed if the item is currently linked to a **Sales Invoice**, the **Parent Type** of the item is SINV.
 - **Invoice No:** This will auto populate with the invoice no that this item is linked to.
 - The field below Invoice No will be blank.

These fields are editable. A scenario for editing this may be that the customer who bought the item may wish your company to now service the machine. These fields can then be edited to place the item into the Customer Warehouse.

Edit the Location of the Asset Linked to a Sales Invoice

You can change the location of the item if it is currently linked to a Sales Invoice.

- Click on the **search** button in the **Invoice No** field.



1. The **Select the location of this machine** pop up screen will appear. This screen will only list the Customer Asset warehouses as this is a customer owned machine and cannot be placed in a company warehouse.
2. Click on the **row selector** in front of the alternate location **description** that you wish to link to this item.
3. Click on **OK**.

Equipment Maintenance for Serial No : 2020-102049 - BPO: Version 2.1.0.69 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back

Process

Links
Enter text to search...

Functions

- WO History
- Project History
- Meters
- History
- BOM
- Warranties 1
- Notes

Select the location of this machine

Home

Ok | Back | Save Layout

Process | Format

Drag a column header here to group by that column

Description	IsBinLocation	PCName	StoremanName	IsDefault	IsStock	IsAsset	AutoIssue	Ac
CPT Customer Equipment Warehouse	No	Cape Town Purchasing Centre	Belinda Sharman	No	No	No	No	
Customer Asset Warehouse	Yes	Purchasing Centre	Bianca Du Toit	No	No	No	No	77
In Transit CPT	Yes	Cape Town Purchasing Centre	Belinda Sharman	No	No	No	No	66

Invoice No INV0000174

Loan Unit ☐ WO Default Item ☐

In Service ☒ WO Notification ☐

Rotable ☒ Tasks ☒

Travel Rate 0

Refurbishment Date 01 Jan 1900

Depreciation Start 26 Sep 2014

Useful Life 20

Is Fixed Asset ☐

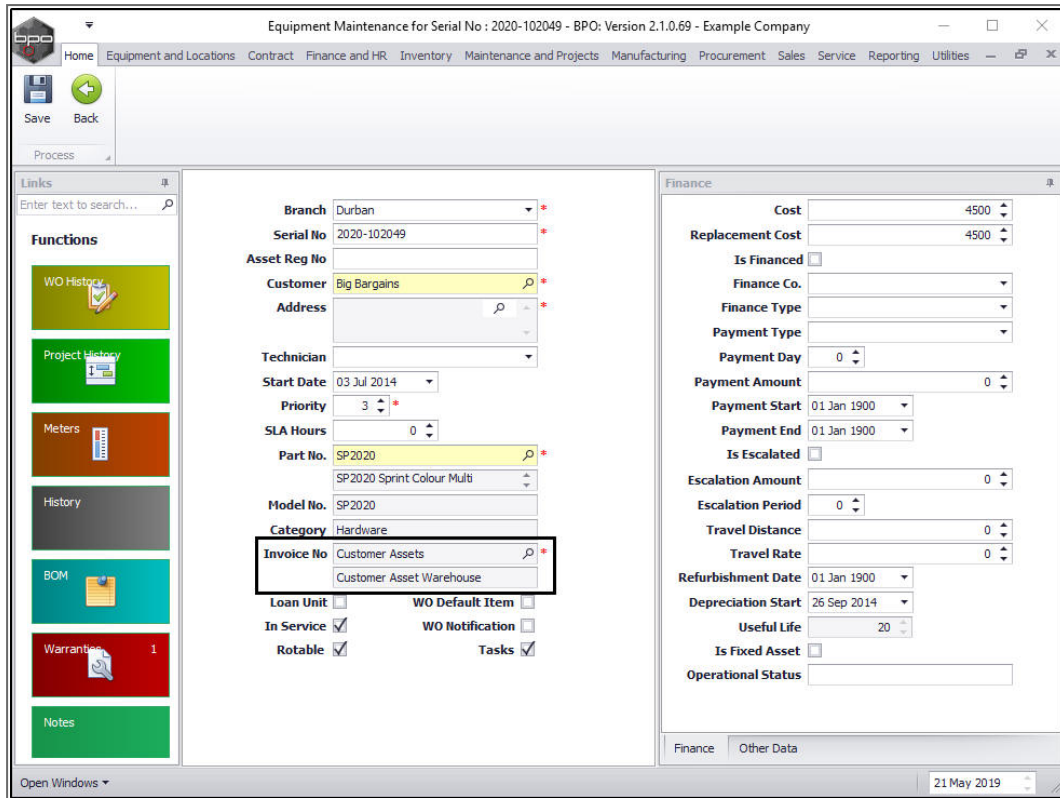
Operational Status

Finance | Other Data

Open Windows

21 May 2019

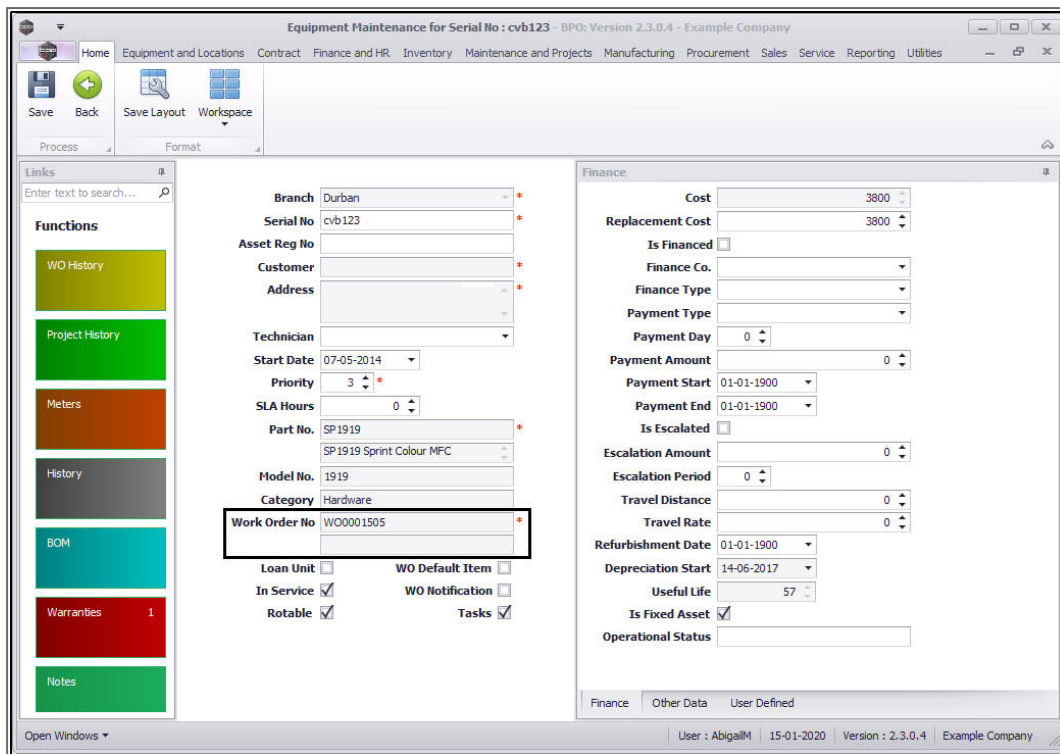
- The **Invoice No** fields will now populate with the selected location details.



ASSET LINKED TO A WORK ORDER

- **Work Order No:** This field will only be displayed if the item is currently linked to a **Work Order**, the **Parent Type** of the item is WKOR.
 - **Work Order No:** This field will contain the number of the Work Order to which this item is linked.
 - The field below Work Order No will be blank.

These fields cannot be edited.



ASSET LINKED TO A WAREHOUSE AND BIN

This is a **serialised stock**¹ item linked to a Warehouse and Bin.

- **Bin** and **Warehouse**: This field will only be displayed if the item is currently a serialised stock item linked to a **Warehouse**, the **Parent Type** of the item is WHSE.
 - **Bin**: This will auto populate with the name of the bin that the item is placed in.
 - **Warehouse**: This will auto populate with the name of the warehouse the item is placed in.

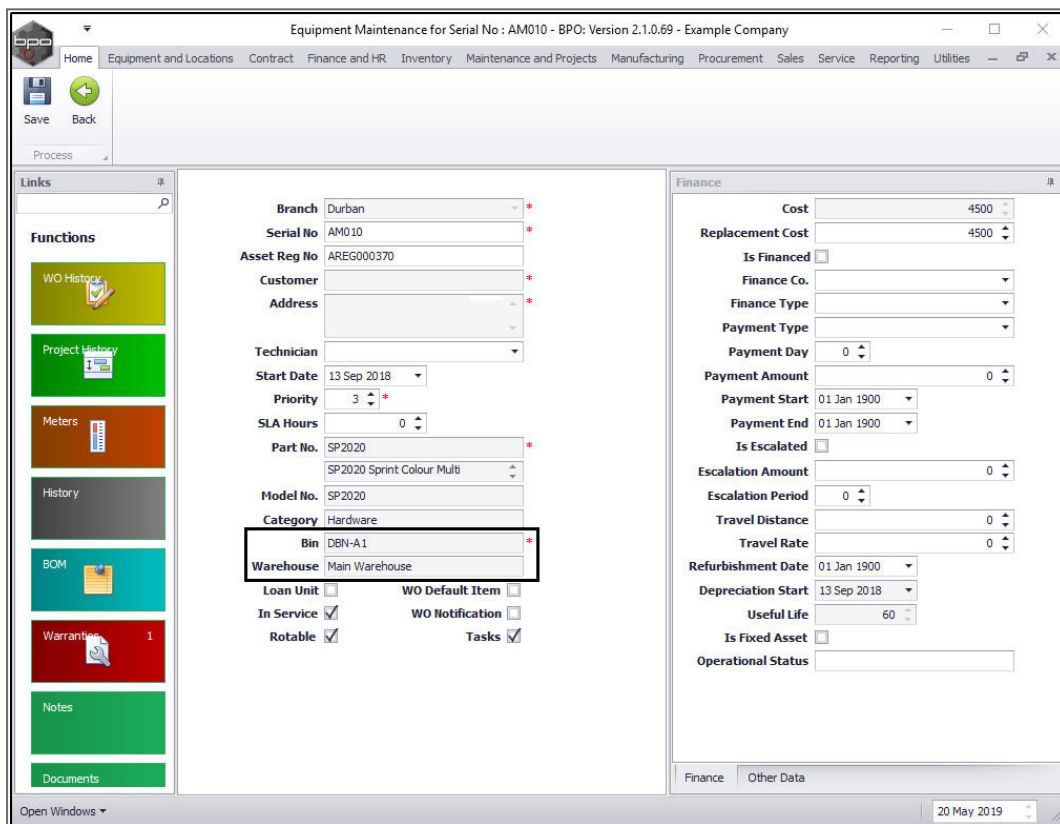
These fields cannot be edited.

¹A serialised stock item is an item in store, ready to be sold, without a rental or service agreement. It is not an asset, it only becomes an asset when converted from a stock item.

Note on Asset Transfer Processes

If you wish to transfer assets to an alternative state, you can use the following processes:

- You can move a serialised stock item to the Assets warehouse using the **Convert Stock to Asset** process.
- You can move an internal asset to the Stock warehouse using the **Convert Asset to Stock** process.
- You can move a serialised stock item to another warehouse (and/or bin) using the **Stock Transfer** process.



The screenshot displays the 'Equipment Maintenance for Serial No : AM010 - BPO: Version 2.1.0.69 - Example Company' window. The interface includes a top navigation bar with tabs like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A left sidebar contains 'Links' and 'Functions' sections. The main area is divided into three panels: 'General', 'Finance', and 'Other Data'.

General Information:

- Branch: Durban
- Serial No: AM010
- Asset Reg No: AREG000370
- Customer: [Empty]
- Address: [Empty]
- Technician: [Empty]
- Start Date: 13 Sep 2018
- Priority: 3
- SLA Hours: 0
- Part No: SP2020
- Model No: SP2020
- Category: Hardware
- Bin: DBN-A1
- Warehouse: Main Warehouse
- Loan Unit: ☐
- WO Default Item: ☐
- In Service: ☒
- WO Notification: ☐
- Rotable: ☒
- Tasks: ☒

Finance Information:

- Cost: 4500
- Replacement Cost: 4500
- Is Financed: ☐
- Finance Co.: [Empty]
- Finance Type: [Empty]
- Payment Type: [Empty]
- Payment Day: 0
- Payment Amount: 0
- Payment Start: 01 Jan 1900
- Payment End: 01 Jan 1900
- Is Escalated: ☐
- Escalation Amount: 0
- Escalation Period: 0
- Travel Distance: 0
- Travel Rate: 0
- Refurbishment Date: 01 Jan 1900
- Depreciation Start: 13 Sep 2018
- Useful Life: 60
- Is Fixed Asset: ☐
- Operational Status: [Empty]

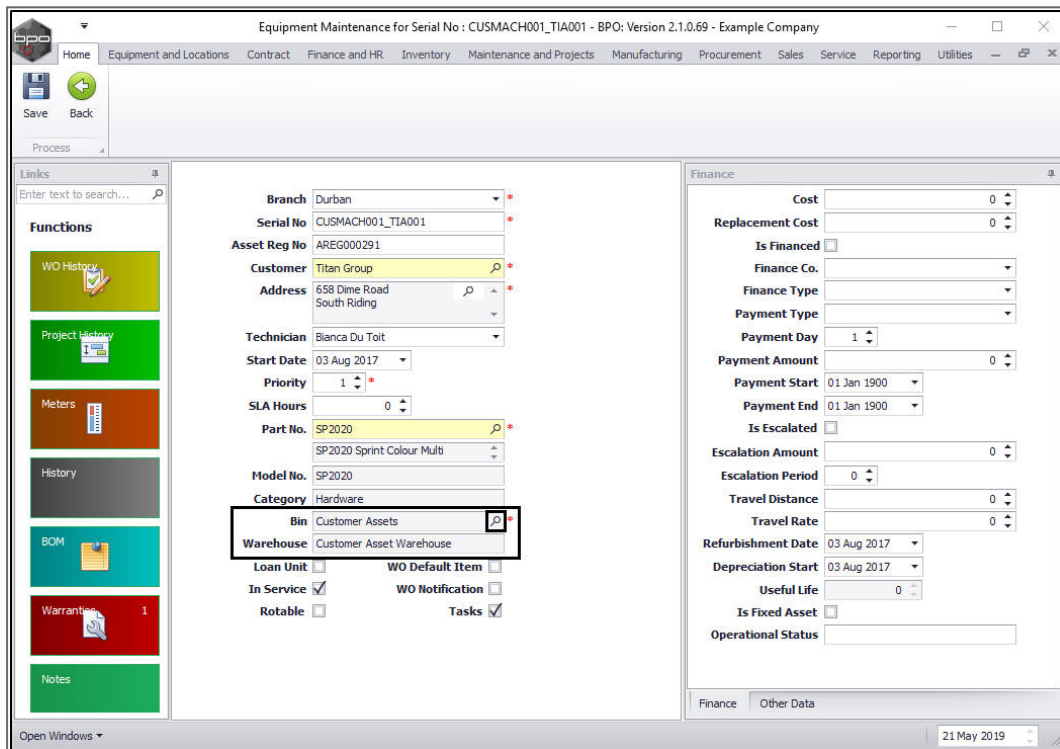
The bottom of the window shows 'Open Windows' and a date/time stamp of '20 May 2019'.

ASSET LINKED TO CUSTOMER ASSET WAREHOUSE AND BIN

You can edit the location of the item if it is currently sitting in a **Customer Asset Warehouse** and **Bin**, the **Parent Type** of the item is WHSE. The item can only be moved to another Customer Asset Warehouse as it remains a Customer Asset.

Edit the Location of an Asset currently in the Customer Assets Warehouse

- Click on the **search** button in the **Bin** field.



- The **Select the location of this machine** pop up screen will appear.
- click on the row selector in front of the alternate **location** that you wish to link to this item.
- Click on **OK**.

Equipment Maintenance for Serial No : CUSMACH001_TIA001 - BPO: Version 2.1.0.69 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

1

Select the location of this machine

Home

Ok Back Save Layout

Process Format

3

Drag a column header here to group by that column

Description	IsBinLocation	PCName	StoremanName	IsDefault	IsStock	IsAsset	AutoIssue	AccountCod
CPT Customer Equipment Warehouse	No	Cape Town Purchasing Centre	Belinda Sharman	No	No	No	No	
Customer Asset Warehouse	Yes	Purchasing Centre	Bianca Du Toit	No	No	No	No	7700
In Transit CPT	Yes	Cape Town Purchasing Centre	Belinda Sharman	No	No	No	No	6600

2

Model No. SP2020

Category Hardware

Bin Customer Assets

Warehouse Customer Asset Warehouse

Loan Unit ☐ WO Default Item ☐

In Service ☒ WO Notification ☐

Rotable ☐ Tasks ☒

Escalation Period 0

Travel Distance 0

Travel Rate 0

Refurbishment Date 03 Aug 2017

Depreciation Start 03 Aug 2017

Useful Life 0

Is Fixed Asset ☐

Operational Status

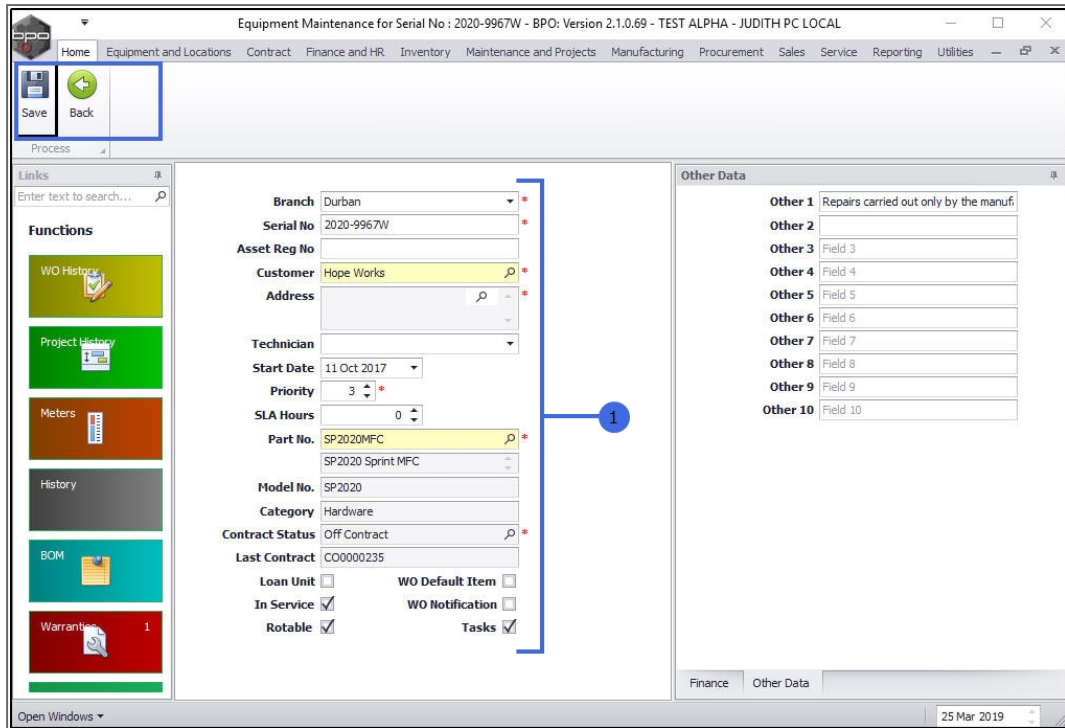
Finance Other Data

Open Windows

21 May 2019

SAVE ASSET CHANGES

- Once all the required asset details are updated, click on **Save**.



The edited details will be **saved** and you will return to the **Machine List for []** screen.

Related Topics

- [Assets - Edit - Asset Details](#)
- [Assets - Edit - Finance Details](#)
- [Assets - Edit - Asset Details](#)
- [Assets - Add - User Defined](#)

MNU.007.006

