

EQUIPMENT

ASSETS - NOTES - VIEW, ADD

There may be **notes** or **comments** that need to be recorded and linked to a particular asset. This process sets out how to view the current notes, if applicable, and how to link additional notes. Notes <u>cannot</u> be edited or deleted.

Ribbon Access: Equipment and Locations > Assets

	Ŧ				BP	O: Version 2.1.0.45 - Example	Company				-		×
	Equipment and	Locations	Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
Assets	>												
Assets	Depreciation	Functional Locations											
Equi	ipment 🦼	Locati ,											

• The *Machine List for []* screen will be displayed.

THE SITE AND TYPE FILTERS

- The screen will open with the default *Site* setting configured on the user.
 - In this image *Durban* is selected.

Note: Refer to Site Selection for more information about Site settings.



Home Equipment	and Loc	cations Contract Finance and HR Inventory	Maintenance a	and Projects Man	nufacturing	Procurement Sa	ales Service	e Repo	orting Utilities	- 6	P :
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Add Edit Delete	View	Save Layout Workspaces Save Filter 0	All Sites		Conver	rt Buy Back F	Print Expo	rt R	eports		
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nks	щ	Drag a column header here to group by that c	110000								
ter text to search	P	Description			delNo	CustomerName	DeptName	Status	CategoryDesc	Asset	I
Functions		•			A CENTO	Castomerrane	Deputance	Status	cutegorybese	Paser	-
Tunctions		SP2020 Sprint Colour Multi Functional Copier			2020	Hope Works	Technical	A	Hardware	No	N
WO History		SP2020 Sprint Colour Multi Functional Copier	SP2020 SP2020	2020-8081	SP2020	Hope Works	Technical	A	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-8082	SP2020	Hope Works	Technical	A	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier SP2020 Sprint Colour Multi Functional Copier	SP2020 SP2020	2020-8083	SP2020 SP2020	Derton Techn	recrimical	A	Hardware	No	N
Project History		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-8086	SP2020	Hope Works	Technical	A	Hardware	No	N
respectives of y		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-8087	SP2020	Derton Techn	rearried	A	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-8088	SP2020	Hope Works	Technical	A	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-8089	SP2020	Hope Works	Technical	A	Hardware	No	
Meters		SP 1919 Sprint Colour MFC	SP 19 19	1919-20202	1919	Hope Works	Technical	A	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-43256	SP2020	Hope Works	Technical	A	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-43257	SP2020	Hope Works	Technical	A	Hardware	No	N
History		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-43258	SP2020	Hope Works	Technical	A	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-43259	SP2020	Hope Works	Technical	A	Hardware	No	N
		Drum	2020-856	2020-4328		Cash Sales A	Sales De	A	Accessories	No	N
BOM		Sprint copier	SP 18 18	1818-0935		Cash Sales A	Sales De	A	Hardware	No	N
		Sprint copier	SP 18 18	1818-0957		Big Bargains		A	Hardware	No	N
		Sprint copier	SP 18 18	1818-7054		Bothas Netw		A	Hardware	No	N
Warranties 1		Sprint copier	SP1818	1818-9756		Bothas Netw		Α	Hardware	No	N
		Sprint copier	SP1818	1818-8691		Bothas Netw		A	Hardware	No	١
		Drum	2020-856	2020-2222		Derton Techn		A	Accessories	No	N
Notes		SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020	Hope Works	Technical	Α	Hardware	No	N
		SP2020 Sprint Colour Multi Functional Copier	SP2020	123	SP2020	Hope Works	Technical	Α	Hardware	No	١
		SP2020 Sprint Colour Multi Functional Copier	SP2020	99119911	SP2020	Fine Hair Salon		Α	Hardware	No	N
Documents		Drum	2020-856	10011		Hope Works	Technical	Α	Accessories	No	N
e occimento		Drum	2020-856	10022		Hope Works	Technical	Α	Accessories	No	N

 This screen will open by default in the *All* Type. You do <u>not</u> need to change this Type to view or add asset notes. If this screen is already open in another Type e.g. Internal Assets, then click on the *drop-down arrow* and select from the list, the right Type that contains the asset you wish to work with.

SELECT THE ASSET

- 2. Select the *row* of the *asset* where you wish to view the linked *notes*.
- 3. Click on the *Notes* tile.



₹					Machine List for Durban	- BPO: Version 2	2.4.0.11 - Exa	imple Compa	any					
	Home E	quipment	/Locations C	ontract Fina	nce / HR Inventory Mainte	nance / Projects	Manufactu	ring Procu	rement Sales	Service	Reporting	Utilities	— d	5)
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inter tex	t to search	<u>م</u>	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsEixedAsset	wo
=		Ŷ	R E C	R C	8 0 0	R C	R C	8 0 0	REC	e B C	=	8 B C	8 B C	880
Histo	ory		AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wge12	A	16/04/2020	No	No	No
			AREG000396	SP 500	Sprint Colour Copier	Hardware	WHSE		Kam005	A	14/04/2020	No	No	No
			AREG000395	SP500	Sprint Colour Copier	Hardware	WHSE		Kam004	A	14/04/2020	No	No	No
BOM			AREG000394	SP500	Sprint Colour Copier	Hardware	WHSE		Kam003	A	14/04/2020	No	No	No
			AREG000393	SP 500	Sprint Colour Copier	Hardware	WHSE		Kam002	A	14/04/2020	No	No	No
			AREG000392	SP 500	Sprint Colour Copier	Hardware	WHSE		Kam001	A	14/04/2020	No	No	No
Warr	ranties	1	AREG000391	15-856	Drum for SP1515	Spare Parts	WKOR		15-856-005	A	19/02/2020	No	No	No
			AREG000390	ACR11111	Acer Copier	Hardware	WHSE		test	A	22/09/2019	No	No	No
			AREG000389	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	HOP001	A	10/09/2019	No	No	No
Note	s		AREG000388	DM100200	Colour Copier	Hardware	WHSE	DM100200	DM100200-154	A	22/07/2019	No	No	No
			123	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-12345-5689	Α	03/05/2019	Yes	Yes	No
			AREG000003	SP 1020	Copier	Hardware	WHSE	SP 10 20	1020-1478	Α	08/01/2019	No	No	No
Dec	iments		AREG000378	SR2020	SP2020 Sprint Colour MF Copier	Hardware	SINV	SP2020	Test-swap	A	19/11/2018	No	No	No
Doct	ments		AREG000011	SP 1020 2	Copier	Hardware	WHSE	SP1020	TIER 123	Α	15/11/2018	No	No	No
			AREG000007	SP 1020	Copier	Hardware	CTRT	SP1020	1020-10102	A	15/11/2018	No	Yes	No
	3	<u> </u>	AREG000376	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-147852	A	19/09/2018	No	Yes	No
Main	tenance		AREG000374	SP 19 19	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	1919-44778855	Α	07/09/2018	No	No	No
			AREG000373	SP1919	SP1919 Sprint Colour MFC	Hardware	WHSE	1919	BrokenStock	A	07/09/2018	No	No	No
			AREG000371	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	14785236985247	A	23/07/2018	No	No	No
Depr	reciation		AREG000370	2020-856	Drum	Accessories	WHSE		2020-856-7878	A	03/07/2018	No	No	No
			AREG000369	SP1919	SP1919 Sprint Colour MFC	Hardware	WHSE	1919	1919-98986565		03/07/2018	No	No	No
			AREG000368	204-147K	SP204 Black Toner	Toners	WHSE		204-11442255	A	03/07/2018	No	No	No

VIEW NOTE(S)

- 1. The *Note Listing for Serial No. : []* screen will open.
- 2. Here you can view a list of all the notes linked to the selected asset.
 - Note: You <u>cannot</u> edit or delete any information in the *Comments* data grid.
- 3. Click on the *Back* button to return to the Machine Listing screen.



Add Back S	Save Layout						
Processing ,	Format a						
ig a column heade	r here to group by that co	lumn					
Comment		Date	FullName				
REC		-	10c				
Purchase Order re	ef: PO0000503	03/05/2019	Bianca Du Toit				
Operational		02/05/2017	Judith Mudzengi				
		02/05/2017	Judith Mudzengi				
Test new note for	r asset	20/03/2017	Bianca Du Toit				
Second hand mac	hine - in service	19/01/2017	Bianca Du Toit				
Second Hand Unit	t in Service	19/01/2017	Bianca Du Toit				
test		12/02/2015	Bianca Du Toit				
test adjustment re	eports	12/02/2015	Bianca Du Toit				
test adjustment re	eports	12/02/2015	Bianca Du Toit				
Purchase Order re	ef: PO0000170	27/01/2015	Bianca Du Toit				
Purchase Order re	ef: PO0000053	14/05/2014	Belinda Sharman				
		08/04/2014	Belinda Sharman				
		03/04/2014	Belinda Sharman				
		03/04/2014	Belinda Sharman				
		03/04/2014	Belinda Sharman				

ADD A NOTE TO AN ASSET

Navigate to the *Note Listing for Serial No.:* [] screen as explained above.

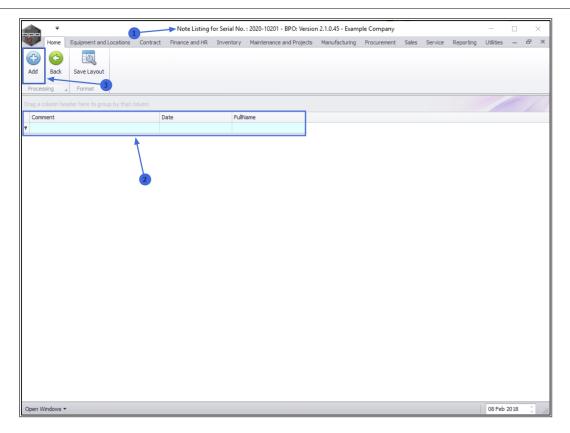
- 1. Select the *row* of the asset.
- 2. Click on the *Notes* tile.



	Home	Equipmen	nt and Lo	cations (Contract F	inance a	and HR	Inventory	Maintenance	and Projects	Manuf	facturing	Procurement Si	ales Servio	e Repo	orting Utilities	- 6	5	
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dd	Edit	Delete	View	Save La	yout Work	spaces	Save Fi	ter All	•	Refresh	Revalu	ue Conver	rt Buy Back	Print Expe	ort R	leports			
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nks			4																
ter te	xt to sear	ch	م ر	Descri	iption				PartCode	SerialNo		ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	Is	
Fur	nctions			9															
_			_	Drum					2020-856	856-14741			Danny Storm		A	Accessories	No	N	
WO History			Copie	, 1				SP 1020	branch01		SP1020	North West B		A	Hardware	No	N		
				Copie	·/				SP 1020	DAN-123	45	SP1020	Dancing Shoes		A	Hardware	No	N	
				SP 202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-103	3056	SP2020	Hope Works	Technical	A	Hardware	No	N	
Project History				SP 19-	12 Colour Co	pier			SP19-123456	1912-102	2035	SP19-12	Office Suppli		A	Hardware	No	N	
				SP 19-	12 Colour Co	pier			SP19-123456	1912-102	2036	SP19-12	Westwood D		A	Hardware	No	N	
				▶ SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-103	201	SP2020	Titan Group		A	Hardware	No	N	
Meters			SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-102	202	SP2020	Office Suppli		A	Hardware	No	N		
			SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-102	203	SP2020	Westwood D		A	Hardware	No	N		
			SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-102	204	SP2020	Office Suppli		Α	Hardware	No	N		
н	istory			SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-102	205	SP2020	Bothas Netw		Α	Hardware	No	N	
	13 COI Y			Drum					2020-856	77458			Hope Works	Technical	Α	Accessories	No	N	
				Kruge	r ZN Fax Ma	chine			KZN-122TFB	20-9876	5	ZN122	Hope Works	Technical	Α	Hardware	No	N	
				Kruge	r ZN Fax Ma	chine			KZN-122TFB	12-9876	5	ZN122	Hope Works	Technical	Α	Hardware	No	N	
В	OM			Copie	r				SP 1020	12-1234	5	SP1020	Hope Works	Technical	Α	Hardware	No	N	
				SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	765	SP2020	Hope Works	Technical	A	Hardware	No	N	
				SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	75	SP2020	Hope Works	Technical	Α	Hardware	No	N	
W	/arranties		1	SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	74	SP2020	Hope Works	Technical	Α	Hardware	No	Ν	
				SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	73	SP2020	Hope Works	Technical	Α	Hardware	No	N	
				SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	72	SP2020	Hope Works	Technical	Α	Hardware	No	N	
N	lotes			SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	762	SP2020	Hope Works	Technical	A	Hardware	No	١	
				SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	20202-98	871	SP2020	Hope Works	Technical	Α	Hardware	No	N	
L				SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	70	SP2020	Hope Works	Technical	Α	Hardware	No	N	
D	ocuments	ients		SP202	20 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	77	SP2020	Hope Works	Technical	Α	Hardware	No	Ν	
				SP202	8 Sprint Cold	our Multi	Function	al Copier	SP2020	2020-983	78	SP2020	Hope Works	Technical	A	Hardware	No	N	

- 1. The *Note Listing for Serial No.:* [] screen will open.
- 2. In this example there are no notes currently linked to the selected asset.
- 3. Click on *Add*.



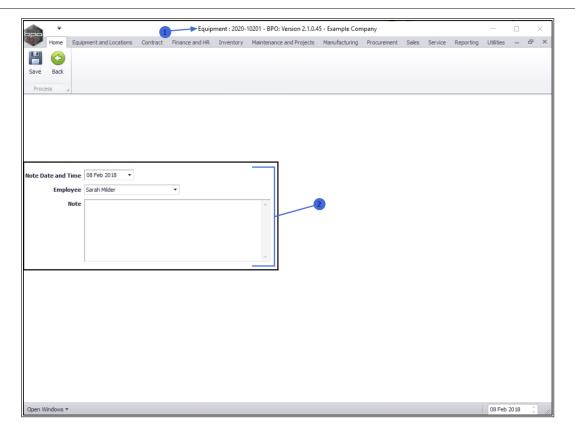


1. The *Equipment: []* screen will be displayed.

ADD NOTE DETAILS

- 2. Add the Note *details*, as required:
 - Note Date and Time: This will auto populate with the current date and time. You can click on the drop-down arrow and use the calendar function to select an alternative date, if required.
 - **Employee:** This will auto populate with the person currently logged on to the system. You can click on the drop-down arrow and select an alternative employee, if required.
 - **Note:** Click in the text box and type in the relevant note information, as required.

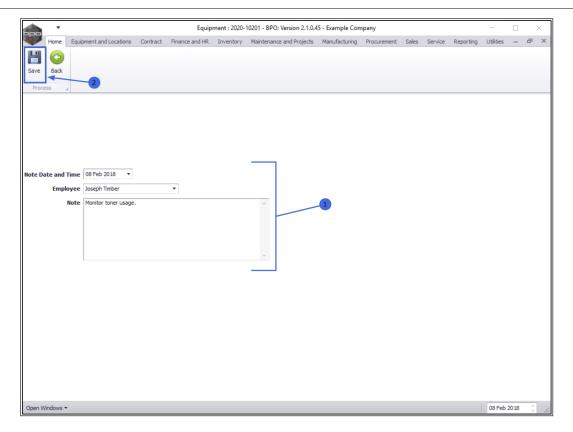




SAVE NOTE DETAILS

- When you have finished adding the note details,
- Click on *Save*.





- You will return to the *Note Listing for Serial No.: []* screen.
- An *Asset Processing* message box will appear, advising the following:
 - Note has been added to Asset No: [].
- Click on OK.

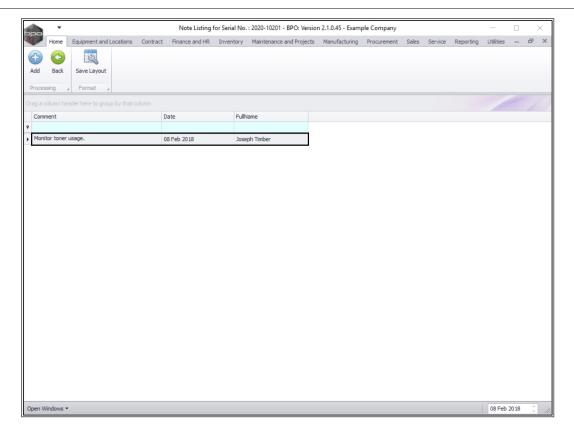


	Note Listing for Seria	I No. : 2020-10201 - BPO: Versio	on 2.1.0.45 - Examp	ole Company				_		\times	
Home Equipment and Locations Contra	ct Finance and HR Inven	tory Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	₽ X	
🕀 😋 🔣											
Add Back Save Layout											
Processing _ Format _											
Comment	Date	FullName									
9 Mariles have a											
 Monitor toner usage. 	08 Feb 2018	8 Joseph Timber									
	Asset Pr	ocessing		×							
		Note has been added to Ass	et No : 2020-10201								
				_							
			OK								
Open Windows 👻								08 Feb	2018	÷ //	

VIEW ADDED NOTE

• You can now view the logged note in the *Comment* section of this screen.





• Click on *Back* to return to the *Machine List for []* screen.

MNU.007.013