

EQUIPMENT

ASSETS - VIEW CLIENT MACHINE

The **View** button in the Asset Listing screen (**Machine List for** [] screen) allows you to view more details with regards to a selected asset.

This screen lists relevant asset information depending on whether the asset selected is:

- i. a <u>Client Machine</u> (Customer Asset)
- ii. an Internal Asset or
- iii. a Serialised Stock Item

In this process, we will examine the details for a **Client Machine** (Customer Asset).

Ribbon Access: Equipment and Locations > Assets

4													
÷ •						BPO: Version 2.4.	0.11 - Example C	ompany					
	Equipment	t / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
	3												
Assets	Depreciation	Functional Locations											
Eq	uipment	Locations											۵

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

SELECT THE SITE AND STATUS

- This screen will open by default with the *Site* filter set to *All Sites* and the *Status* filter set to *All* (machines).
 - The *Site* filter does <u>not</u> need to be changed in order to be able to view the details of a selected asset. However if you



wish to narrow your filter parameters you can click on the drop-down *arrows* and select a particular *Site* from the list.

3. To be certain that you will select the correct type of asset to view, ensure that the *Status* is set to *Client Machines*.

•	1		> Machin	e List for Du	rban - BPO: Version	2.4.0.11 - E	cample (ompany					×
Home Equipm	ent / Locations	Contract Fina	ince / HR In	ventory M	laintenance / Projects	Manufact	uring A	rocurement Sales	Service	Reporting	Utilities		8 x
Add Edit Delete V	fiew Save Layo	out Workspaces	Save Eiker	All Sites	7 •	Revalue C	onvert E	Iuy Back Print Ex		Reports			
Maintenance	4	Format 2	-	Туре	A Description	Pr	ocess -	Print	a F	teports 4			~
inks #					All Client Machines Internal Assets								
nter text to search P	AssetRegNo	PartCode	Description	S	Serialised Stock	ур	e Model	No SerialNo	Status	StartDate	Asset	IsFixedAsset	WOAt
Functions	P ROC	REC	REC				8 B C	A C	# 0 C	-	* 0 0	REC	REC 4
	AREG000006	SP 1020	Copier				SP 102	0 1020-10101	A	22/06/2015	No	No	No
WO History	▶ AREG000012	SP1020	Copier	x		11.	SP102	0 NEW1234	Α	20/10/2015	No	No	No
	AREG000027	2020-856	Drum		Accessories	SINV		856-14741	Α	10/11/2015	No	No	No
	AREG000028	2020-856	Drum		Accessories	SINV		856-25852	Α	10/11/2015	No	No	No
Project History	AREG000032	SP1020	Copier		Hardware	WHSE	SP 102	0 branch01	A	14/01/2016	No	No	Yes
	AREG000039	SP1020	Copier		Hardware	CTRT	SP 102	0 DAN-12345	A	06/04/2016	No	No	No
	AREG000052	SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	CTRT	SP202	0 2020-103057	A	05/07/2016	No	No	No
Meters		SP19-123456	SP19-12 Color	ur Copier	Hardware	SINV	SP 19-	12 1912-102035	A	02/07/2014	No	No	No
		SP19-123456	SP19-12 Color	ur Copier	Hardware	SINV	SP 19-	12 1912-102036	A	02/07/2014	No	No	No
		SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	CTRT	SP202	0 2020-10202	Α	02/07/2014	No	No	No
History		SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	SINV	SP202	0 2020-10203	A	02/07/2014	No	No	No
1 10 001 9		SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	CTRT	SP202	0 2020-10204	Α	02/07/2014	No	No	No
		SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	SINV	SP202	0 2020-10205	Α	02/07/2014	No	No	No
	AREG000059	2020-856	Drum		Accessories	WHSE		77458	Α	08/09/2016	No	No	No
BOM	AREG000060	KZN-122TFB	Kruger ZN Fax	x Machine	Hardware	WHSE	ZN 122	20-98765	A	13/02/2017	No	No	No
	AREG000062	SP1020	Copier		Hardware	CTRT	SP102	0 12-12345	A	14/02/2017	No	No	No
	AREG000063	SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	CTRT	SP202	0 2020-98765	A	22/02/2017	No	No	No
Warranties 1	AREG000064	SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	CTRT	SP202	0 2020-9875	A	22/02/2017	No	No	No
	AREG000065	SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	WHSE	SP202	0 2020-9874	Α	22/02/2017	No	No	No
	AREG000066	SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	CTRT	SP202	0 2020-9873	Α	22/02/2017	No	No	No
Notes	AREG000067	SP2020	SP2020 Sprint	t Colour MF Co	pier Hardware	WHSE	SP202	0 2020-9872	A	22/02/2017	No	No	No
	AREG000068	SP2020	SP2020 Sprint	t Colour MF Co	oier Hardware	WHSE	SP202	0 2020-98762	A	22/02/2017	No	No	No *

CLIENT MACHINE - PARENT TYPES

With the Status set to *Client Machines*, you will note that there are **3** potential *Parent Types*;

- i. **SINV** Sales Invoice,
- ii. **CTRT** Contract,
- iii. WHSE Warehouse.

Each of these Parent Types will affect which *fields* and what *field content* can be viewed in the next screen.



In the following screen shots, we will look at an example of a Client Machine linked to <u>each</u> Parent Type.

-						Machine	List for Durban -	BPO: Version 2	.4.0.11 - Exar	nple Compar	ny				
	Home	Equipm	ent / L	ocations Cor	ntract Finar	nce / HR Inv	entory Mainten	ance / Projects	Manufacturin	g Procurer	ment Sales S	ervice	Reporting U	tilities	- 8
Add	Edit	X Delete	iew	Save Lavout	Workspaces	Save Filter	All Sites	Refresh	Revalue Com	ert Buy Bad	k Print Expor	t Re	Coorts		
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nter tex	ct to searc	ch P	A	ssetRegNo	PartCode	Description		CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset
Funct	tions		9 8	- -	* E ¢	100		* 0 ¢	R I C	R II C	n 🗖 c	8 0 0	-	8 0 0	R O C
			A	REG000307	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	CTRT	SP2020	447788552211	A	01/02/2018	No	No
WOH			A	REG000308	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	SINV	SP2020	M00019120000	A	13/02/2018	No	No
			A	REG000309	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	CTRT	SP2020	09501101530003	A	21/02/2018	No	No
			A	REG000310	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	CTRT	SP2020	010950110153	A	21/02/2018	No	No
Proje	ect Histor	y	A	REG000312	NMACH	New Machine		Hardware	WHSE		NMACH-2020-1	A	05/03/2018	No	No
			A	REG000313	NMACH	New Machine		Hardware	CTRT		NMACH-2020-5	A	05/03/2018	No	No
			A	REG000323	AT500	AT500 Copier	-	Hardware	SINV	AT500	AT500-102	A	25/04/2018	No	No
Mete	ers		A	REG000324	AT500	AT500 Copier	ii	Hardware	SINV	AT500	AT500-103	A	25/04/2018	No	No
- nete			A	REG000349	SP1818	Sprint copier		Hardware	CTRT		sp1818-1234a	A	10/05/2018	No	No
			A	REG000337	AT500	AT500 Copier		Hardware	SINV	AT500	258	A	25/04/2018	No	No
			A	REG000358	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	CTRT	SP2020	SP2020-1234	A	22/05/2018	No	No
HISTO	ory		A	REG000363	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	CTRT	SP2020	SP2020-CON001	A	18/06/2018	No	No
			A	REG000371	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	WHSE	SP2020	14785236985247	A	23/07/2018	No	No
			A	REG000373	SP 19 19	SP1919 Sprint	Colour MFC	Hardware	WHSE	1919	BrokenStock	A	07/09/2018	No	No
BOM			A	REG000374	SP 19 19	SP 1919 Sprint	Colour MFC	Hardware	CTRT	1919	1919-44778855	A	07/09/2018	No	No
			A	REG000378	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	SINV	SP2020	Test-swap	A	19/11/2018	No	No
			A	REG000389	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	CTRT	SP2020	HOP001	A	10/09/2019	No	No
Warr	ranties	1	A	REG000410	PCMON001	PC Monitor - S	amsung	Accessories	WHSE		2020-9193	A	18/01/2021	No	No
			A	REG000411	SP 500	Sprint Colour	Copier	Hardware	WHSE		AKM001002	Α	15/02/2021	No	No
			A	REG000412	SP2020	SP2020 Sprint	Colour MF Copier	Hardware	WHSE	SP2020	000001	A	11/02/2021	No	No
Note			A	REG000397	AT500	AT500 Copier		Hardware	SINV	AT500	wge12	A	16/04/2020	No	No

CLIENT MACHINE - WHSE

SELECT THE ASSET

- 1. In the *Machine List for []* screen,
- 2. Select the *row* of the client machine you wish to view.
- 3. Take note of the *Parent Type* of this asset. In this example it is: **WHSE** Warehouse.
- 4. Click on View.



View Client Machine

Home Equipm	ent / Locations C	ontract Final	nce / HR Inventory Mainten	ance / Projects	Manufacturin	g Procure	ment Sales S	ervice	Reporting U	tilities	- 8
dd Edit Delete	/iew Save Lavour	t Workspaces	All Sites	• Refresh	tevalue Conv	ert Buy Bad	k Print Expor	t Re	C		
		4	Ciencindennes				•		-		
Maintenance	4	rmat	⊿ Current	4	Proce	ISS	a Print	⊿ Rej	ports 🔺		
ıks II											
ter text to search 🔎	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsse
unctions	♀ #∎c	A D C	• 🖬 c	* 0 ¢	R O C	R B C	R B C	R D C	-	n 🖬 c	REC
	AREG000307	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	447788552211	A	01/02/2018	No	No
WO History	AREG000308	SP2020	SP2020 Sprint Colour MF Copier	Hardware	SINV	SP2020	M00019120000	A	13/02/2018	No	No
	AREG000309	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	92020	09501101530003	A	21/02/2018	No	No
	AREG000310	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	010950110153	A	21/02/2018	No	No
Project History	AREG000312	NMACH	New Machine	Hardware	WHSE		NMACH-2020-1	A	05/03/2018	No	No
oject history	AREG000313	NMACH	New Machine	Hardware	CTRT	3	NMACH-2020-5	A	05/03/2018	No	No
	AREG000323	AT500	AT500 Copier	Hardware	SINV	AT500	AT500-102	A	25/04/2018	No	No
Meters	AREG000324	AT500	AT500 Copier	Hardware	SINV	AT500	AT500-103	A	25/04/2018	No	No
	AREG000349	SP 18 18	Sprint copier	Hardware	CTRT		sp1818-1234a	A	10/05/2018	No	No
	AREG000337	AT500	AT500 Copier	Hardware	SINV	AT500	258	A	25/04/2018	No	No
. Kakaan	AREG000358	SP 20 20	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-1234	A	22/05/2018	No	No
history	AREG000363	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SR2020	SP2020-CON001	A	18/06/2018	No	No
	AREG000371	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	14785236985247	A	23/07/2018	No	No
	AREG000373	SP 19 19	SP1919 Sprint Colour MFC	Hardware	WHSE	,1919	BrokenStock	A	07/09/2018	No	No
BOM	AREG000374	SP 19 19	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	1919-44778855	A	07/09/2018	No	No
	AREG000378	SP2020	SP2020 Sprint Colour MF Copier	Hardware	SINV	SP2020	Test-swap	A	19/11/2018	No	No
	AREG000389	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT /	SP2020	HOP001	A	10/09/2019	No	No
Warranties 1	AREG000410	PCMON001	PC Monitor - Samsung	Accessories	WHSE		2020-9193	Α	18/01/2021	No	No
	AREG000411	SP 500	Sprint Colour Copier	Hardware	WHSE 🖌		AKM001002	Α	15/02/2021	No	No
	▶ AREG000412	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	000001	А	11/02/2021	No	No
Notes	AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wqe12	A	16/04/2020	No	No
2											

- 1. The *Equipment Maintenance for Serial No:* [] screen will open.
- 2. You will note that there is only a *Back* button. This is because this is a <u>view only</u> screen, no changes can be saved in this screen.

VIEW ASSET DETAILS

- 3. The left side of this screen lists the asset details.
- 4. The first **3** fields are used across <u>all</u> asset types:
 - **Branch**: This is the branch or Site the asset is linked to.
 - **Serial No.**: This is the unique identifier of the asset provided by the manufacturer of the item.
 - Asset Register No.: This is the number of the asset created by the user when adding this item to the system. (different from the serial no.)
- 5. As this is a <u>client machine</u> (customer asset), the following **2** fields will be populated:
 - **Customer**: This field will be populated with the *name* of the customer who owns this machine.



• Address: This field will be populated with the <u>address</u> linked to the customer above.

The second se	1>	Equipment Maintenance for	Serial No : 000001 - BP	0: Version 2.4.0.11	- Example Cor	mpany				_
Home Equipme	ent / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	_ & ×
Back Proc 2 Format	rkspace	3								\$
Links A				Finance						4
Enter text to search P	Branch	Durban	- *		Cost			5250	÷.	
Functions	Serial No	000001	* 4	Repla	cement Cost			6250	÷.	
	Asset Reg No	AREG000412			Is Financed	\checkmark				
WO History	Customer	Bits and Bytes	*		Finance Co.	YES001			-	
	5 Address	26 Dune Road	*		Finance Type	Hire Purch	nase		-	
		Forest Hills	-	Pa	ayment Type	Debit Ord	ler		~	
Project History	Technician	Belinda Sharman	*		Payment Day	25 🌐				
	Start Date	11/02/2021 -		Payn	ment Amount			520	D (‡	
	Priority	3 🗘 *		Pa	ayment Start	01/02/20	21 🔻			
Meters	SLA Hours	8 🐥			Payment End	31/01/20	22 🔻			
	Part No.	SP2020	*		Is Escalated	\checkmark				
		SP2020 Sprint Colour MF Copier	÷	Escala	ation Amount		_	10	D (‡	
History	Model No.	SP2020		Esca	alation Period	6 🌲				
	Category	Hardware		Tra	avel Distance			() (‡	
	Bin	Customer Assets	•		Travel Rate			(D (‡	
BOM	Warehouse	Customer Asset Warehouse		Refurbi	ishment Date	01/02/20	21 🔻			
	Loan Unit	WO Default Ite	m 🗌	Depre	eciation Start	31/01/20	25 🔻			
	In Service	WO Notificatio	on 🗌		Useful Life		0 0			
Warranties 1	Rotable	Tas	(5	I	s Fixed Asset					
				Opera	itional Status					
Makes										
Notes				Finance	Other Data	User De	efined			

- 1. The following fields are used across <u>all</u> asset types:
 - **Technician**: Click on the drop-down arrow and select a technician to link to this Client Machine.
 - **Start Date**: This will auto populate with the <u>current</u> date. You can either type in or click on the drop-down arrow and use the calendar function to select an <u>alternative</u> date if required.
 - Priority: Here you can select the priority (1 = Most Important, 5 = Least Important).
 - **SLA Hours**: Here you can select the Service Level Agreement Monitor (in hours).
 - **Part No. and Description**: This will display the part number and description of this Client Machine.
 - Model No.: This will display the model no. of this Client Machine, if applicable



• **Category**: This will display the category of this Client Machine e.g. Hardware, Accessories.

WHSE-SPECIFIC FIELDS

- The next 2 field names will differ depending on the Client Machine Parent Type. In this example, an asset with the Parent Type: WHSE - Warehouse was selected.
 - **Bin**: This will be the specific Client Machine <u>bin</u> linked to the <u>Customer Asset Warehouse</u> set up in the system.
 - Warehouse: This will be the specific <u>Customer Asset Ware-house</u> set up in the system to house Client Machines.

In this example, the item is in the *Customer Assets* bin within the *Customer*

Asset Warehouse.



If the asset selected had the *Parent Type* = **CTRT** - Contract, these fields would be different:



CLIENT MACHINE - CTRT

SELECT THE ASSET

- 1. In the *Machine List for []* screen,
- 2. Select the *row* of the client machine you wish to view.
- 3. Take note of the *Parent Type* of this asset. In this example, it is: **CTRT** Contract.
- 4. Click on View.

V Home Environ	1	Contract Eins	Machine List for Durban -	BPO: Version 2.	4.0.11 - Exam	ple Compan	y ant Salas Sa	un des	Departing 11th	lition	
Add Edit Delete V	iew Save Layo	ut Workspaces	Save Filter Client Machines	Refresh	Revalue Conv	rert Buy Bad	Print Expor	rt Re	eports	ittes	
Maintenance		4 mat	4 Current		Proce	SS	Print	Rep	ports 🖌		
nks 4											
nter text to search P	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset
Functions	9 REC	RBC	4 0 0	REC	REC	REC	ABC	RBC	=	RBC	RBC
	AREG000307	SP2020	SP2020 Sprint Colour ME Copier	Hardware	CTRT	SP2020	447788552211	A	01/02/2018	No	No
WO History	AREG000308	SP2020	SP2020 Sprint Colour MF Copier	Hardware	SINV	SP2020	M00019120000	A	13/02/2018	No	No
	AREG000309	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	09501101530003	A	21/02/2018	No	No
	AREG000310	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	010950110153	A	21/02/2018	No	No
Project History	AREG000312	NMACH	New Machine	Hardware	WHSE		NMACH-2020-1	A	05/03/2018	No	No
	AREG000313	NMACH	New Machine	Hardware	CTRT	3	NMACH-2020-5	A	05/03/2018	No	No
	AREG000323	AT500	AT500 Copier	Hardware	SINV	AT500	AT500-102	A	25/04/2018	No	No
Meters	AREG000324	AT500	AT500 Copier	Hardware	SINV (AT500	AT500-103	A	25/04/2018	No	No
- Action	AREG000349	SP1818	Sprint copier	Hardware	CTRT /		sp1818-1234a	A	10/05/2018	No	No
	AREG000337	AT500	AT500 Copier	Hardware	SINV /	AT500	258	A	25/04/2018	No	No
	AREG000358	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-1234	A	22/05/2018	No	No
History	AREG000363	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-CON001	A	18/06/2018	No	No
	AREG000371	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	14785236985247	A	23/07/2018	No	No
	AREG000373	SP 19 19	SP1919 Sprint Colour MFC	Hardware	WHSE	1919	BrokenStock	A	07/09/2018	No	No
BOM	AREG000374	SP1919	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	1919-44778855	A	07/09/2018	No	No
	AREG000378	SP2020	SP2020 Sprint Colour MF Copier	Hardware	SINV	SP2020	Test-swap	Α	19/11/2018	No	No
	AREG000389	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	HOP001	A	10/09/2019	No	No
Warranties 1	AREG000410	PCMON001	PC Monitor - Samsung	Accessories	WHSE		2020-9193	A	18/01/2021	No	No
	AREG000411	SP500	Sprint Colour Copier	Hardware	WHSE		AKM001002	А	15/02/2021	No	No
	AREG000412	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	000001	А	11/02/2021	No	No
Notos	AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wge12	A	16/04/2020	No	No

1. The *Equipment Maintenance for Serial No:* [] screen will open.

VIEW ASSET DETAILS

 All of the fields are the same as described above for Client Machine -WHSE, except for the *Bin* and *Warehouse* fields.



CTRT-SPECIFIC FIELDS

- 3. These have been replaced with *Contract* and *Customer Name*.
 - **Contract**: This field will be populated with the Contract No. linked to this client machine.
 - **Customer Name**: This field will be populated with the name of the customer linked to the Contract No. in the field above.

*	1 Equip	oment Maintenance for Serial	No:SP20	20-CON001 -	BPO: Version 2.4	4.0.11 - Examp	ple Comp	any				x
Home Equipme	nt / Locations Contract	Finance / HR Inventory	Maintenand	ce / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8	х
Back Proc Format	kspace											\$
Links #					Finance							4
Enter text to search P	Branch	Durban	- *			Cost			٥	*		
Functions	Serial No	SP2020-CON001			Repla	cement Cost			0			
Tunctions	Asset Reg No	AREG000363				Is Financed						
WO History	Customer	Pink Shoes	•			Finance Co.				~		
	Address	House	* *		F	Finance Type				-		
		Town	-		Pa	ayment Type				-		
Project History	Technician		-		P	ayment Day	1 🗘]				
	Start Date	18/06/2018 🔻		2	Payn	nent Amount			0	*		
	Priority	1 🗘 *			Pa	yment Start	01/01/19	• 00				
Meters	SLA Hours	0 🐥			- F	Payment End	01/01/19	• 00				
	Part No.	SP2020	•			Is Escalated						
		SP2020 Sprint Colour MF Copier	÷		Escala	tion Amount			0	*		
History	Model No.	SP2020			Esca	lation Period	0 🗘					
	Category	Hardware			Tra	vel Distance			0	*		
3	Contract	CO0000077	*			Travel Rate			0	*		
BOM	Customer Name	Pink Shoes			Refurbis	shment Date	18/06/20	18 🔻				
	Loan Unit	W0 Default Iter	n 🗌		Depre	ciation Start	18/06/20	18 🔻				
	In Service	WO Notificatio	n			Useful Life		0 📮				
Warranties 1	Rotable	Task	s		Is	Fixed Asset				_		
					Opera	tional Status						
Notes												
					Finance	Other Data	User De	fined				

If the asset selected had the *Parent Type* = SINV - Sales Invoice, these fields would be different again:

CLIENT MACHINE - SINV

SELECT THE ASSET

- 1. In the *Machine List for []* screen,
- 2. Select the *row* of the client machine you wish to view.



- 3. Take note of the *Parent Type* of this asset. In this example, it is: **SINV** Sales Invoice.
- 4. Click on *View*.

*				1		Machine List for Durban -	BPO: Version 2.	.4.0.11 - Exar	nple Compar	ıy				
	Home	Equip	ment	/Locations C	ontract Fina	nce / HR Inventory Mainten	ance / Projects	Manufacturin	ig Procuren	ient Sales Se	rvice I	Reporting Uti	ities	- 8
Ð		×				All Sites	•	***** P	- 6	e e		Ē		
dd	Edit	Delete	View	Save Layou	t Workspaces	Save Filter Client Machines	- Refresh	Revalue Con	vert Buy Bac	k Print Expor	t Re	ports •		
	Mainten	ance	_		4 rmat	Current		Proc	ess	Print	Rep	orts ,		
ks														
er text	t to sear		5					_					//	/
				AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsse
uncti	ions		٩	8 🗖 C	RBC	8 8 C	R C	* 0 ¢	REC	R B C	8 8 C	-	8 B C	8 8 C
				AREG000307	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	447788552211	A	01/02/2018	No	No
				AREG000308	SP2020	SP2020 Sprint Colour MF Copier	Hardware	SINV	SP2020	M00019120000	A	13/02/2018	No	No
				AREG000309	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	09501101530003	A	21/02/2018	No	No
				AREG000310	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	010950110153	Α	21/02/2018	No	No
Proje	ct Histor			AREG000312	NMACH	New Machine	Hardware	WHSE	2	NMACH-2020-1	Α	05/03/2018	No	No
				AREG000313	NMACH	New Machine	Hardware	CTRT	ų,	NMACH-2020-5	Α	05/03/2018	No	No
				AREG000323	AT500	AT500 Copier	Hardware	SINV	AT500	AT500-102	A	25/04/2018	No	No
Mete	rs			AREG000324	AT500	AT500 Copier	Hardware	SINV	AT500	AT500-103	A	25/04/2018	No	No
				AREG000349	SP 18 18	Sprint copier	Hardware	CTRT	1	sp1818-1234a	A	10/05/2018	No	No
				AREG000337	AT500	AT500 Copier	Hardware	SINV	AT500	258	Α	25/04/2018	No	No
Links	-			AREG000358	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-1234	Α	22/05/2018	No	No
HISTO	¢γ			AREG000363	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-CON001	Α	18/06/2018	No	No
				AREG000371	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	14785236985247	A	23/07/2018	No	No
				AREG000373	SP 19 19	SP1919 Sprint Colour MFC	Hardware	WHSE	1919	BrokenStock	A	07/09/2018	No	No
BOM				AREG000374	SP 19 19	SP 1919 Sprint Colour MFC	Hardware	CTRT I	1919	1919-44778855	A	07/09/2018	No	No
			2	AREG000378	SP2020	SP2020 Sprint Colour MF Copier	Hardware	SINV	SP2020	Test-swap	Α	19/11/2018	No	No
			Ŷ	AREG000389	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	HOP001	A	10/09/2019	No	No
Warr	anties			AREG000410	PCMON001	PC Monitor - Samsung	Accessories	WHSE !		2020-9193	A	18/01/2021	No	No
				AREG000411	SP500	Sprint Colour Copier	Hardware	WHSE		AKM001002	A	15/02/2021	No	No
			N	AREG000412	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE ¥	SP2020	000001	A	11/02/2021	No	No
	-		,	AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wge12	A	16/04/2020	No	No

1. The *Equipment Maintenance for Serial No:* [] screen will open.

VIEW ASSET DETAILS

- 2. All of the fields are the same as described above for the Client Machine
 - CTRT, except for the *Contract* and *Customer Name* fields.

SINV-SPECIFIC FIELDS

- 3. These have been replaced with *Category* and *Invoice No*.
 - **Category**: This field will be populated with the Category type linked to this client machine e.g. Hardware, Accessories.



• Invoice No: This field will be populated with the number of the Sales Invoice linked to the selected asset that has been sold to the customer, named in the Customer field.

• •	1>	Equipment Maintenance for S	erial No : wqe12 - BPO	: Version 2.4.0.11 - Example C	ompany		- • x
Home Equipme	ent / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing Procurement	Sales Service	Reporting Utilities	_ & ×
Back Save Layout Wo	rkspace						
Figure a	1			Gamma			
Enter text to search				rinance			+
	Branch	Durban	· ·	Cost		1500 -	
Functions	Serial No	wqe12		Replacement Cost		1500 -	
WO History	Asset Reg No	AREG000397		Is Financed			
WO HISTORY	Customer	Young Electric <		Finance Co.		Ψ	
	Address		- T	Finance Type		· · · · · · · · · · · · · · · · · · ·	
Project History	Tashaisian			Payment Type	0 ^		
Project history	Technician Charle Data	16/04/2020 -		Payment Day	U	0 *	
	Stdrt Date	16/04/2020 *		Payment Amount	01/01/1000 -	0 -	
Meters	FIGUE	0 ^		Payment Start	01/01/1900 -		
THE CELO	Bart No	AT500		Ts Escalated	01/01/1900 •		
	Farcho.	AT500 Copier		Escalation Amount		0 ^	
History	Model No	AT500	T	Escalation Period	0 ^	0 +	
	Category	Hardware		Travel Distance		0 ^	
	3 Invoice No	INV0000536 <		Travel Rate		0 0	
BOM				Refurbishment Date	01/01/1900 -		
	Loan Unit	W0 Default Iten	n 🗖	Depreciation Start	16/04/2020 -		
	In Service	W0 Notificatio	n 🗆	Useful Life	60 🗍		
Warranties 1	Rotable	Task	s 🗸	Is Fixed Asset			
				Operational Status			
Notes				Finance Other Data	User Defined		

All Client Machines no matter which Parent Type they are linked to, display the following:

ASSET DETAILS CHECK BOXES

- Loan Unit: This check box is to be ticked if this is a loan machine to be issued and sent out to a client whilst their machine is being repaired - that would apply to an internal asset therefore the check box would be unchecked for a serialised stock item.
- In Service: This check box is to be ticked if the item falls within a service plan and needs to be periodically serviced. A serialised stock item can be under a service plan, this check box can be <u>ticked</u>.



- Rotable: This is a servicing method in which an already-repaired equipment item is exchanged for a failed equipment item, which in turn is repaired and kept for another exchange. A serialised stock item can be repaired and waiting to be sent out as an internal asset. (*This functionality is not currently in use in BPO2.*)
- WO Default Item: If this option is set in the company configuration, one machine per customer needs to be marked as the default (this machine will pull through automatically when a customer is selected on a new call).
- WO Notification: Select this check box to indicate whether this machine is linked to an automated / scheduled task set up. A work order notification will be sent out when the machine is due to be serviced.
- Tasks: This check box is related to the above, and is linked to the Maintenance / Project screen. Refer to <u>Introduction to Tasks</u> for more information.

*	I	quipment Maintenance for Se	rial No : 000001 - BPC): Version 2.4.0.11 - Example Co	mpany	_ – ×
Home Equipment	t / Locations Contract	Finance / HR Inventory M	laintenance / Projects	Manufacturing Procurement	Sales Service Reporting	Utilities — 🗗 🗙
Back Proc Format	space					\$
Links #				Finance		Ф.
Enter text to search 🔎	Branch	Durban	-	Cost	6250	* *
Functions	Serial No	000001	*	Replacement Cost	6250	÷
	Asset Reg No	AREG000412		Is Financed	V	
WO History	Customer	Bits and Bytes	*	Finance Co.	YES001	-
	Address	26 Dune Road	*	Finance Type	Hire Purchase	-
		Forest Hills	-	Payment Type	Debit Order	-
Project History	Technician	Belinda Sharman	-	Payment Day	25 🌲	
	Start Date	11/02/2021 -		Payment Amount	520	*
	Priority	3 ≑ *		Payment Start	01/02/2021 -	
Meters	SLA Hours	8 🌲		Payment End	31/01/2022 -	
	Part No.	SP2020	*	Is Escalated	V	
		SP2020 Sprint Colour MF Copier	÷	Escalation Amount	10	÷
History	Model No.	SP2020		Escalation Period	6	
	Category	Hardware	_	Travel Distance	0	÷
ROM	Bin	Customer Assets	-	Travel Rate	01/02/2021	v
DOM	warenouse	WO Default Item	-	Returbishment Date	21/01/2025	
	In Service	WO Notification		Depreciation Start	31/01/2023 +	
Warranties 1	Rotable	Tasks		Ts Fixed Asset		
				Operational Status		
Notes						
				Finance Other Data	User Defined	



FINANCE FRAME

If the **Finance** frame is not already displayed, click on the *tab* to bring it to the fore.

The **Financial details** frame will be expanded. The population of these fields will depend on several factors:

- i. Whether the equipment item is **financed**.
- ii. Whether a **depreciation method** has been applied to this equipment item.
- iii. Whether an **escalation amount** and **period** have been applied to this equipment item.
 - **Cost**: This is the purchase price of the item. Either type in or use the arrow indicators to enter the cost of the item.
 - **Replacement Cost**: This is the cost of replacing the machine. Either type in or use the arrow indicators to enter the replacement cost of the item.
 - Is Financed: This field shows whether a third party has provided funds for this item e.g. the item has been financed by a bank. Click on this check box if this item is financed by a third party (this would also apply to a <u>client owned asset</u>).
 - **Finance Co.**: Click on the drop-down arrow and select the finance company supplying finance / funds for this item, if applicable.
 - Finance Type: This field shows what finance type has been provided for this item. Click on the drop-down arrow and select the finance type e.g. Hire Purchase, Lease Agreement, Rental Agreement.
 - **Payment Type**: Click on the drop-down arrow and select the payment type e.g. Debit Order, Cheque, Bank Transfer.



- **Payment Day**: Either type in or use the arrow indicators to enter the day of the month (e.g. 25th) that this payment will be made.
- **Payment Amount**: Either type in or use the arrow indicators to enter the payment amount that is to be paid monthly.
- **Payment Start**: Either type in or click on the drop-down arrow and use the *calendar* function to select the payment start date.
- **Payment End**: Either type in or click on the drop-down arrow and use the *calendar* function to select the payment end date.
- **Is Escalated**: Click on this check box if this payment amount is to be escalated after a period of time. (e.g. a 10% increment yearly.)
- **Escalation Amount**: Either type in or use the arrow indicators to enter by how much the repayment amount will increase.
- Escalation Period: Either type in or use the arrow indicators to enter the time period (e.g. the month) after which this payment amount will be escalated.
- **Travel Distance**: Type in the total travel distance in kilometres, if you want the system to include travel on all Call invoices raised.
- **Travel Rate**: Type in the travel rate if using Travel Distance.
- **Refurbishment Date**: Either type in or click on the drop-down arrow and use the calendar function to select the date when the item is to receive an overhaul and/or repair.
- **Depreciation Start**: Depreciation is a measure of how much an item drops in value each year. Either type in or click on the drop-down arrow and use the calendar function to select the date when the depreciation of the item will start.
- Useful Life: This is the estimated lifespan of a depreciable item how many years it is likely to remain in service. This is important from an accounting perspective, where the usefulness of a machine is calculated before it gets written off, e.g. 5 years. Type in the number of months that the item will be in condition before



it is considered a write off. This field is affected by <u>depreciation</u>, if it is enabled.

- Is Fixed Asset: This check box will be <u>unchecked</u> as it only applies to an *internal* asset.
- Operational Status: Here you have the ability to add information or comments about anything related to the machine e.g. 'machine passed Useful Life', or 'may be stripped for parts' or 'may still be useful for short term loan out'. This function provides information about the suitability of the item for operation. Type in whether the item is operational or not, and why, if required.

\$ *	1	Equipment Maintenance for Seria	No:000001 - BPO: Version 2.4.0.11	l - Example Cor	mpany		_	
Home Equipme	ent / Locations Contract	Finance / HR Inventory Mair	tenance / Projects Manufacturing	Procurement	Sales Service	Reporting	Utilities —	8 ×
Back Save Layout Wor	kspace							\$
Links #			Finance					ц.
Enter text to search P	Branch	Durban	•	Cost		6250	÷	
Functions	Serial No	000001	* Repl	acement Cost		6250	÷	
	Asset Reg No	AREG000412		Is Financed	\checkmark			
WO History	Customer	Bits and Bytes	•	Finance Co.	YES001		-	
	Address	26 Dune Road	•	Finance Type	Hire Purchase		*	
		Forest Hills T	р	ayment Type	Debit Order		-	
Project History	Technician	Belinda Sharman		Payment Day	25 🌲			
	Start Date	11/02/2021 -	Pay	ment Amount		520	*	
	Priority	3 👶 *	Р	ayment Start	01/02/2021 -			
Meters	SLA Hours	8 🌲		Payment End	31/01/2022 🔹			
	Part No.	SP2020	•	Is Escalated	\checkmark			
		SP2020 Sprint Colour MF Copier	Escal	ation Amount		10	*	
History	Model No.	SP2020	Esc	alation Period	6 🐥			
	Category	Hardware	Tr	avel Distance		0	*	
	Bin	Customer Assets	•	Travel Rate		0	*	
BOM	Warehouse	Customer Asset Warehouse	Refurb	ishment Date	01/02/2021 -			
	Loan Unit	W0 Default Item	Depr	eciation Start	31/01/2025 -			
	In Service	WO Notification		Useful Life	0 🗘			
Warranties 1	Rotable	Tasks	1	s Fixed Asset				
			Opera	ational Status				
Notes			Finance	Other Data	User Defined			

OTHER DATA FRAME

- 1. Click on the **Other Data** tab to bring this frame to the fore.
- 2. There are **10** fields in this screen that can be utilised for additional information that you would like to log against a serialised stock item.



- Note 1: These field labels can be *re-named* to suit your company requirements).
- Note 2: As this is the <u>view only</u> screen you <u>cannot</u> add or edit the fields from here. Information can be added via the <u>Add</u> or <u>Edit</u> buttons.

For more information refer to Other Data.

•	Equipment Maintenance for S	erial No:000001 - BPC	: Version 2.4.0.1	1 - Example Co	mpany					
Home Equipment / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8 ×
Back Save Layout Workspace										Â
Fromat a			Othor Da							
Enter text to search	Durban		Other Da	Custom 1				_		
	000001	*		Custom 2	1					
Functions Asset Ren M	AREG000412			Custom 2						
WO History Custome	Bits and Bytes			Custom 4						
Address	26 Dune Road	*		Custom 5						
	New Town Forest Hills	-		Custom 6						
Project History Technician	Belinda Sharman	*		Custom 7						
Start Date	± 11/02/2021 ▼			Custom 8						
Priority	3 🗘 *			Custom 9						
Meters SLA Hours	8 🐥			Custom 10						
Part No	SP2020	*								
	SP2020 Sprint Colour MF Copier	÷								
History Model No	SP2020									
Category	Hardware									
Bi	Customer Assets	*								
Warehoust Varehoust	Customer Asset Warehouse									
Loan on	WO Notificatio	n 🗌								
Warranties 1 Rotable	Task	• • •								
Notes			Finance	Other Data	User D	efined				

USER DEFINED FRAME

1. Click on the **User Defined** tab to bring this frame to the fore.

At present, these fields in the **Equipment - Assets** module can be used to add *extra* information relevant to the selected asset.

- 2. The added custom fields will reflect in the User Defined panel in the Asset Maintain screen across *all* assets on the system.
- However, the Variable Values selected for each User Defined field will be <u>unique</u> to the selected asset.



This information will also reflect in the *Call Maintain* screen where the asset is linked. Although the fields can be *viewed* from the Call Maintain screen, the actual information can only be *edited* in the Asset Maintain screen.

For more information refer to <u>Add</u> or <u>Edit</u> User Defined.



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