

# EQUIPMENT

## ASSETS – VIEW INTERNAL ASSET

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

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

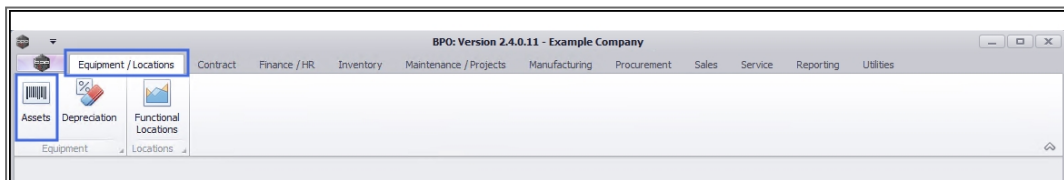
- i. a Client Machine (Customer Asset)
- ii. an Internal Asset or
- iii. a Serialised Stock Item

In this process, we will examine the details for an **internal asset**. This is an asset that is ***owned by the company***, that will be used for ***rental*** purposes, i.e. to generate a revenue.

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

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

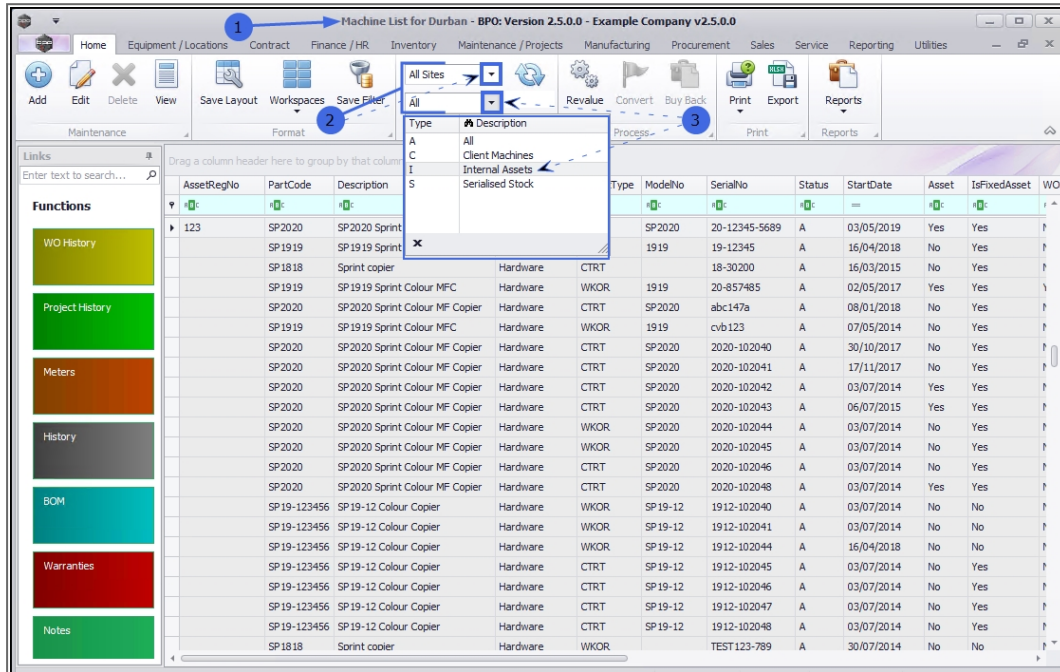
## SELECT THE SITE

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2. 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 not 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 **arrow** and select a particular Site from the list.

- To ensure that you will select the correct type of asset, ensure that the Status is set to **Internal Assets**.

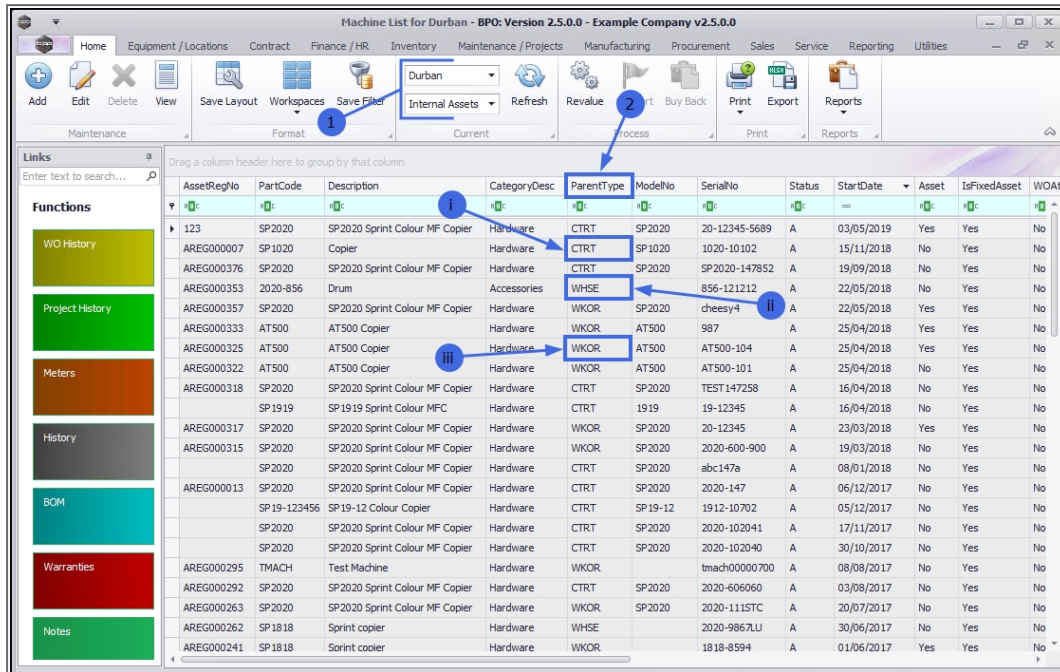


## INTERNAL ASSET – PARENT TYPES

- With the **Site** selected as required and the Status set to **Internal Assets**,
- you will note that there are **3** potential **Parent Types** for an internal asset;
  - CTRT** - Contract
  - WHSE** - Warehouse
  - WKOR** - Work Order

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 an internal asset linked to each Parent Type.

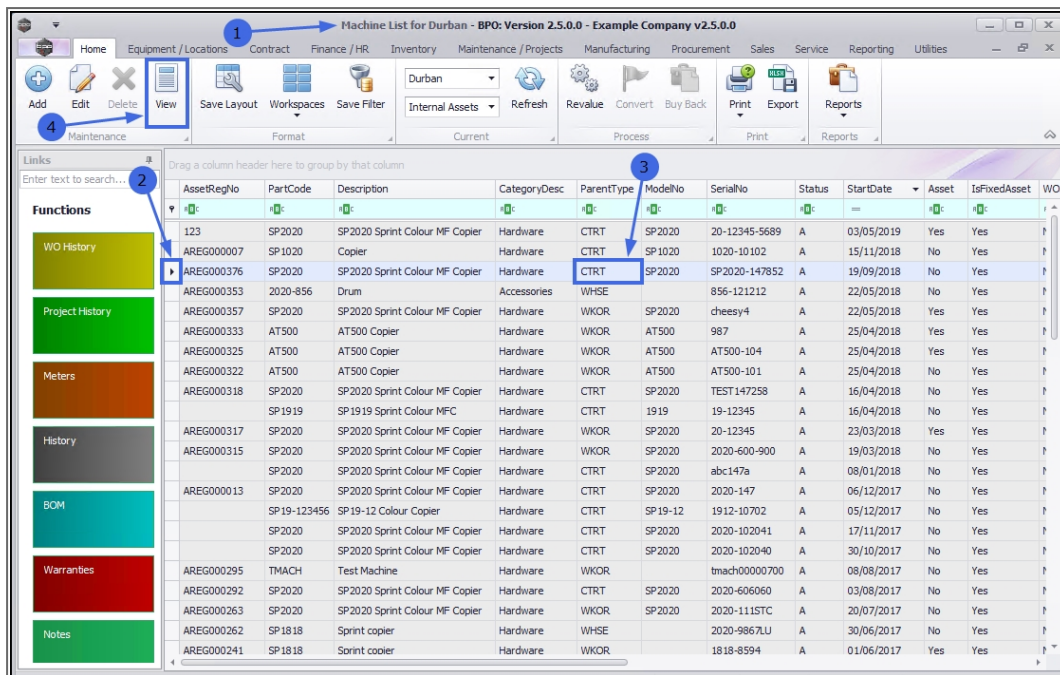


AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset	WOAt
123	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-12345-5689	A	03/05/2019	Yes	Yes	No
AREG000007	SP1020	Copier	Hardware	CTRT	SP1020	1020-10102	A	15/11/2018	No	Yes	No
AREG000376	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-147852	A	19/09/2018	No	Yes	No
AREG000353	2020-856	Drum	Accessories	WHSE	856-121212	856-121212	A	22/05/2018	No	Yes	No
AREG000357	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	cheesy4	A	22/05/2018	Yes	Yes	No
AREG000333	AT500	AT500 Copier	Hardware	WKOR	AT500	987	A	25/04/2018	Yes	Yes	No
AREG000325	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-104	A	25/04/2018	Yes	Yes	No
AREG000322	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-101	A	25/04/2018	No	Yes	No
AREG000318	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	TEST147258	A	16/04/2018	No	Yes	No
	SP1919	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	19-12345	A	16/04/2018	No	Yes	No
AREG000317	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	20-12345	A	23/03/2018	Yes	Yes	No
AREG000315	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-600-900	A	19/03/2018	No	Yes	No
	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	abc147a	A	08/01/2018	No	Yes	No
AREG000013	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-147	A	06/12/2017	No	Yes	No
	SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-10702	A	05/12/2017	No	Yes	No
	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102041	A	17/11/2017	No	Yes	No
	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102040	A	30/10/2017	No	Yes	No
AREG000295	TMACH	Test Machine	Hardware	WKOR		tmach00000700	A	08/08/2017	No	Yes	No
AREG000292	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-606060	A	03/08/2017	No	Yes	No
AREG000263	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-1115TC	A	20/07/2017	No	Yes	No
AREG000262	SP1818	Sprint copier	Hardware	WHSE		2020-9867LU	A	30/06/2017	No	Yes	No
AREG000241	SP1818	Sprint copier	Hardware	WKOR		1818-8594	A	01/06/2017	Yes	Yes	No

## INTERNAL ASSET - CTRT

### SELECT THE ASSET

1. In the **Machine List for [ ]** screen,
2. Select the **row** of the internal asset 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**.

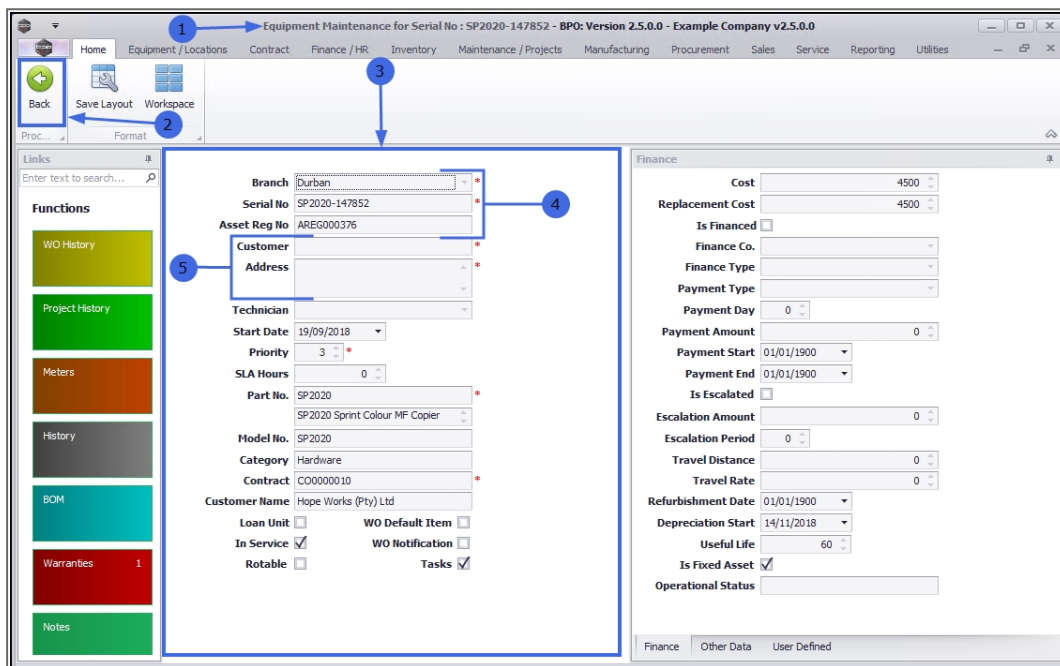


1. The **Equipment Maintenance for Serial No: [ ]** screen will open.
2. You will note that there is only a **Back** button. This is because this is a view only screen, no changes can be made in this screen.

## VIEW ASSET DETAILS

3. The **left** side of this screen lists the asset details.
4. The first **3** fields are used across all 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. The next **2** fields: **Customer** and **Address**, are used only when dealing with a Customer Asset. In this topic we are looking at an **internal asset** so these fields will remain blank.

- **Customer:** This field will be blank for an Internal Asset.
  - (This field will only be populated if this is a Client Machine and will then contain the name of the client that owns the asset.)
- **Address:** This field will be blank for an Internal Asset.
  - (This field will only be populated with the address of the client - as above - if this is a Client Machine.)



1. The following fields are used across all asset types:

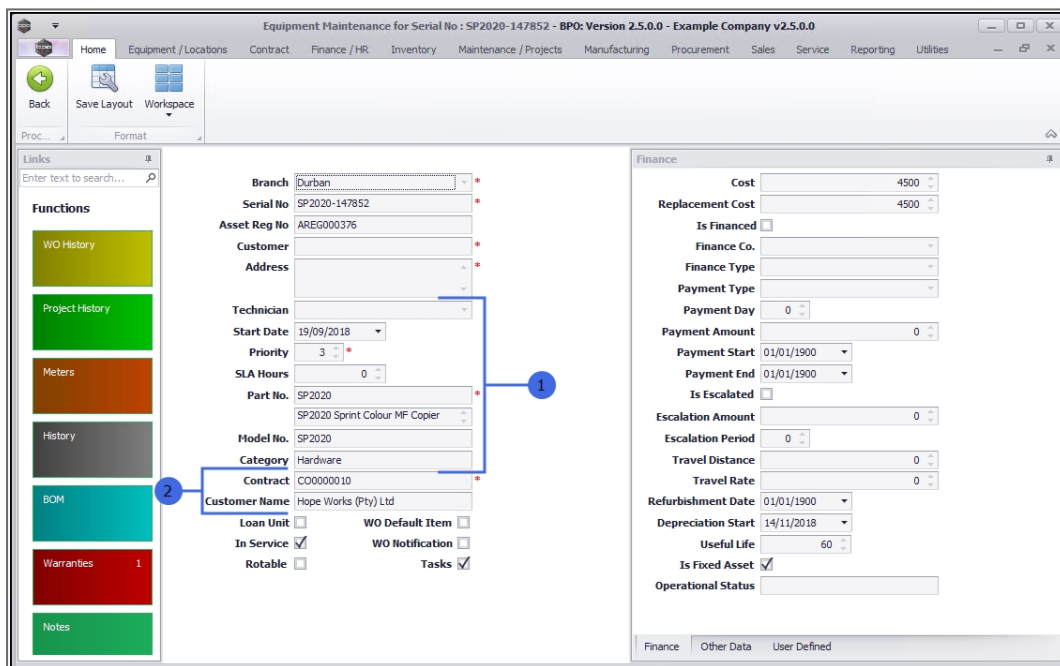
- **Technician:** View the technician currently linked to this item.
- **Start Date:** View the date that this internal asset was acquired.
- **Priority:** View the priority of this internal asset. (1 = Most Important, 5 = Least Important).
- **SLA Hours:** View the Service Level Agreement Monitor (in hours).

- **Part No. and Description:** View the part no. and description of the asset.
- **Model No.:** View the model no. of the asset, if applicable.
- **Category:** View the category of the asset e.g. Hardware, Accessories.

## CTRT-specific Fields

2. The next **2** field names will differ depending on the Internal Asset **Parent Type**. In this example, an asset with the Parent Type: **CTRT** - Contract was selected.

- **Contract:** This will be populated with the contract no. linked to the selected internal asset.
- **Customer Name:** This will be populated with the customer linked to the above mentioned contract.



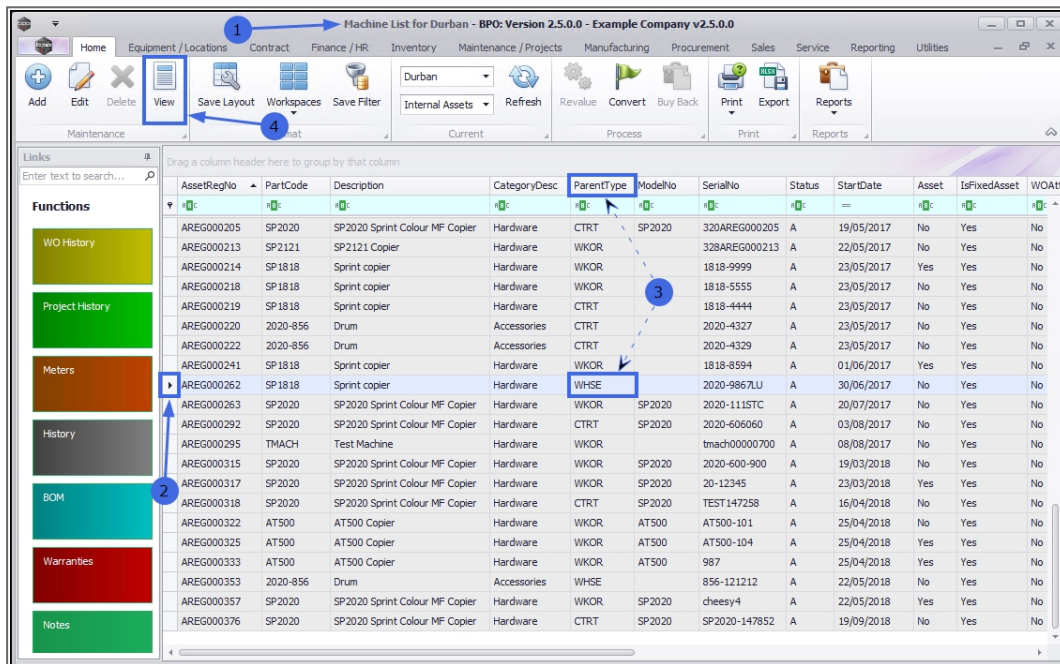
If the asset selected had the **Parent Type** = **WHSE** - Warehouse, these fields would be different:



## INTERNAL ASSET - WHSE

### SELECT THE ASSET

1. In the *Machine List for [ ]* screen,
2. Select the **row** of the internal asset 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**.



AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset	WOAtt
AREG000205	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	320AREG000205	A	19/05/2017	No	Yes	No
AREG000213	SP2121	SP2121 Copier	Hardware	WKOR		328AREG000213	A	22/05/2017	No	Yes	No
AREG000214	SP1818	Sprint copier	Hardware	WKOR		1818-9999	A	23/05/2017	Yes	Yes	No
AREG000218	SP1818	Sprint copier	Hardware	WKOR		1818-5555	A	23/05/2017	No	Yes	No
AREG000219	SP1818	Sprint copier	Hardware	CTRT		1818-4444	A	23/05/2017	No	Yes	No
AREG000220	2020-856	Drum	Accessories	CTRT		2020-4327	A	23/05/2017	No	Yes	No
AREG000222	2020-856	Drum	Accessories	CTRT		2020-4329	A	23/05/2017	No	Yes	No
AREG000241	SP1818	Sprint copier	Hardware	WKOR		1818-8594	A	01/06/2017	Yes	Yes	No
AREG000262	SP1818	Sprint copier	Hardware	WHSE		2020-9867LU	A	30/06/2017	No	Yes	No
AREG000263	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR		2020-1115TC	A	20/07/2017	No	Yes	No
AREG000292	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT		2020-606060	A	03/08/2017	No	Yes	No
AREG000295	TMAOH	Test Machine	Hardware	WKOR		tmach00000700	A	08/08/2017	No	Yes	No
AREG000315	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR		2020-600-900	A	19/03/2018	No	Yes	No
AREG000317	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR		20-12345	A	23/03/2018	Yes	Yes	No
AREG000318	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT		TEST147258	A	16/04/2018	No	Yes	No
AREG000322	AT500	AT500 Copier	Hardware	WKOR		AT500-101	A	25/04/2018	No	Yes	No
AREG000325	AT500	AT500 Copier	Hardware	WKOR		AT500-104	A	25/04/2018	Yes	Yes	No
AREG000333	AT500	AT500 Copier	Hardware	WKOR		987	A	25/04/2018	Yes	Yes	No
AREG000353	2020-856	Drum	Accessories	WHSE		856-121212	A	22/05/2018	No	Yes	No
AREG000357	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR		cheesy4	A	22/05/2018	Yes	Yes	No
AREG000376	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT		SP2020-147852	A	19/09/2018	No	Yes	No

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

### VIEW ASSET DETAILS

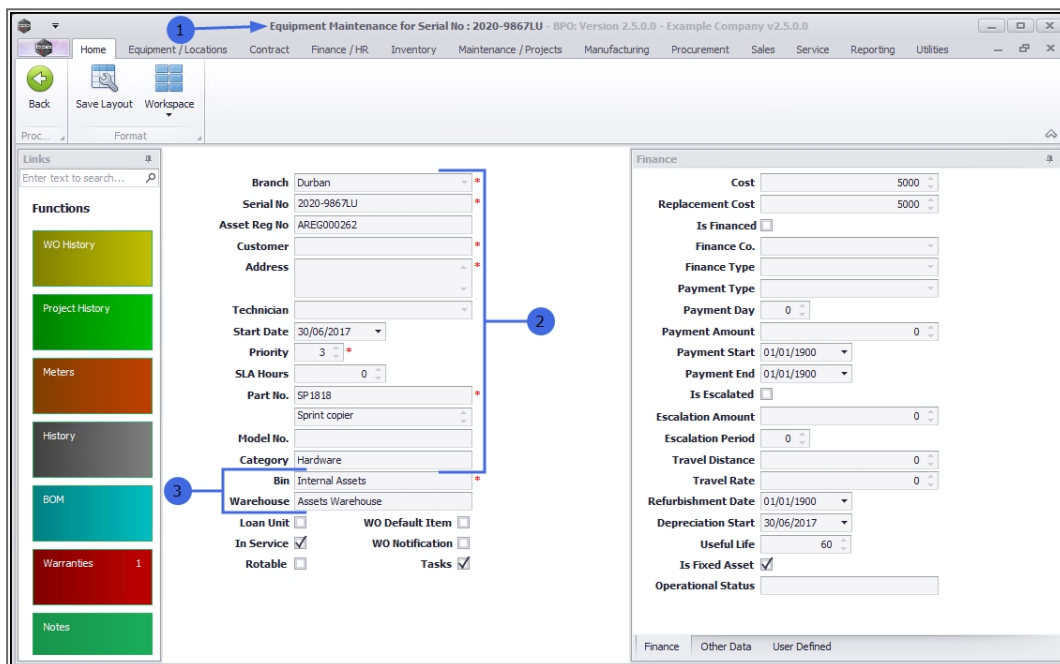
2. All of the fields are the same as described above for Internal Asset - CTRT, except for the **Contract** and **Customer Name** fields.

## WHSE-specific Fields

3. These have been replaced with **Bin** and **Warehouse**.

- **Bin:** This field will be populated with the bin name linked to the internal asset warehouse (below) set up in the system.
- **Warehouse:** This field will be populated with the name of the specific internal asset warehouse set up in the system.

In this example, the item is in the **Internal Assets** bin within the **Assets Warehouse**.



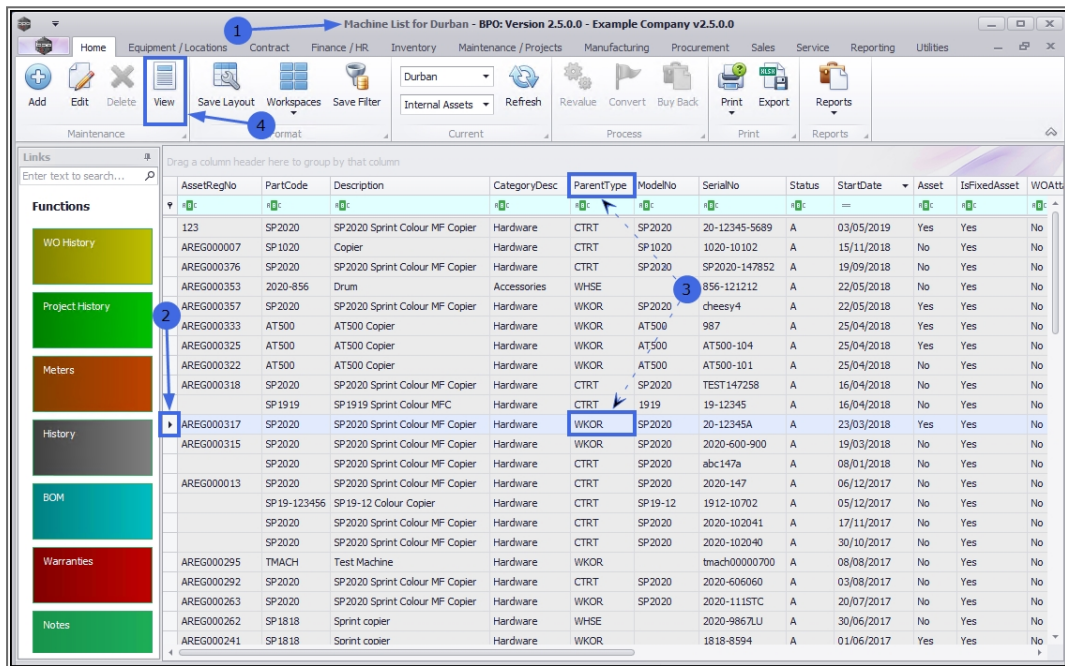
If the asset selected had the Parent Type = **WKOR** - Work Order, these fields would be different again:



## INTERNAL ASSET - WKOR

### SELECT THE ASSET

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



AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset	WOAtt
123	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-12345-5689	A	03/05/2019	Yes	Yes	No
AREG000007	SP1020	Copier	Hardware	CTRT	SP1020	1020-10102	A	15/11/2018	No	Yes	No
AREG000376	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-147852	A	19/09/2018	No	Yes	No
AREG000353	2020-856	Drum	Accessories	WHSE	856-121212	A	22/05/2018	No	Yes	No	No
AREG000357	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	cheesy4	A	22/05/2018	Yes	Yes	No
AREG000333	AT500	AT500 Copier	Hardware	WKOR	AT500	987	A	25/04/2018	Yes	Yes	No
AREG000325	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-104	A	25/04/2018	Yes	Yes	No
AREG000322	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-101	A	25/04/2018	No	Yes	No
AREG000318	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	TEST147258	A	16/04/2018	No	Yes	No
SP1919	SP1919	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	19-12345	A	16/04/2018	No	Yes	No
AREG000317	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	20-12345A	A	23/03/2018	Yes	Yes	No
AREG000315	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-600-900	A	19/03/2018	No	Yes	No
SP2020	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	abc147a	A	08/01/2018	No	Yes	No
AREG000013	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-147	A	06/12/2017	No	Yes	No
SP19-123456	SP19-12	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-10702	A	05/12/2017	No	Yes	No
SP2020	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102041	A	17/11/2017	No	Yes	No
SP2020	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102040	A	30/10/2017	No	Yes	No
AREG000295	TMACH	Test Machine	Hardware	WKOR		tmach00000700	A	08/08/2017	No	Yes	No
AREG000292	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-606060	A	03/08/2017	No	Yes	No
AREG000263	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-1115TC	A	20/07/2017	No	Yes	No
AREG000262	SP1818	Sprint copier	Hardware	WHSE		2020-9867LU	A	30/06/2017	No	Yes	No
AREG000241	SP1818	Sprint copier	Hardware	WKOR		1818-8594	A	01/06/2017	Yes	Yes	No

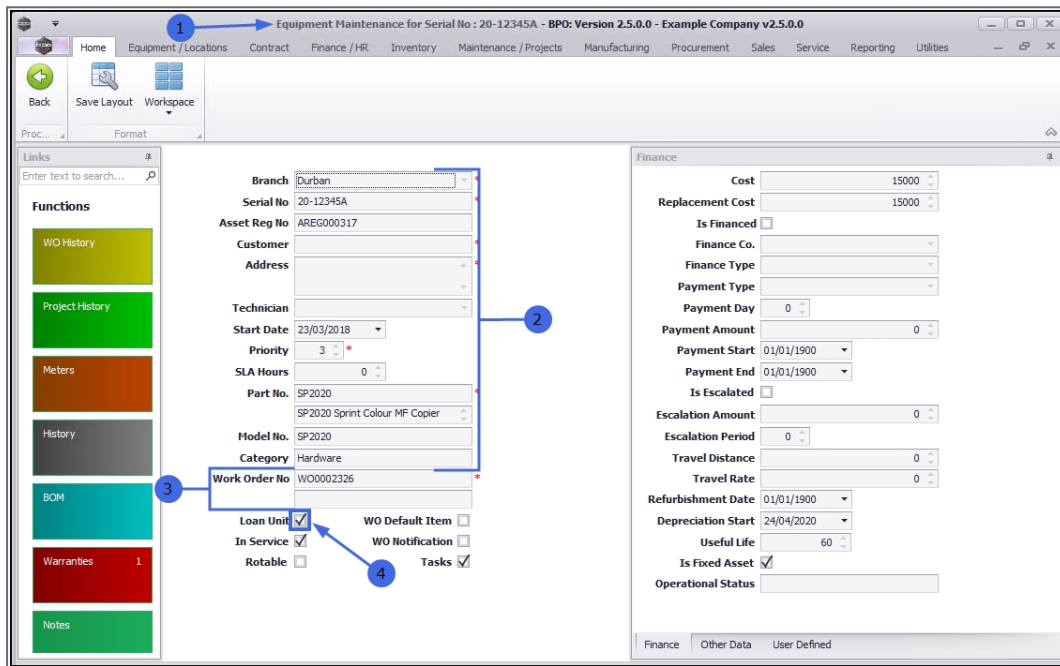
1. The *Equipment Maintenance for Serial No: [ ]* screen will open.

### VIEW ASSET DETAILS

2. All of the fields are the same as described above for Internal Asset - **WHSE**, except for the **Bin** and **Warehouse** fields.

## WHSE-specific Fields

3. These have been replaced with **Work Order No.**
  - **Work Order No:** This field will be populated with the work order number currently linked to the internal asset.
4. For example, this internal asset might be out on **loan** to a customer whilst the customer machine is being repaired - the asset cannot be linked to the internal asset **bin** and **warehouse** fields or the **contract no** and **customer name** fields as this is a temporary loan machine.



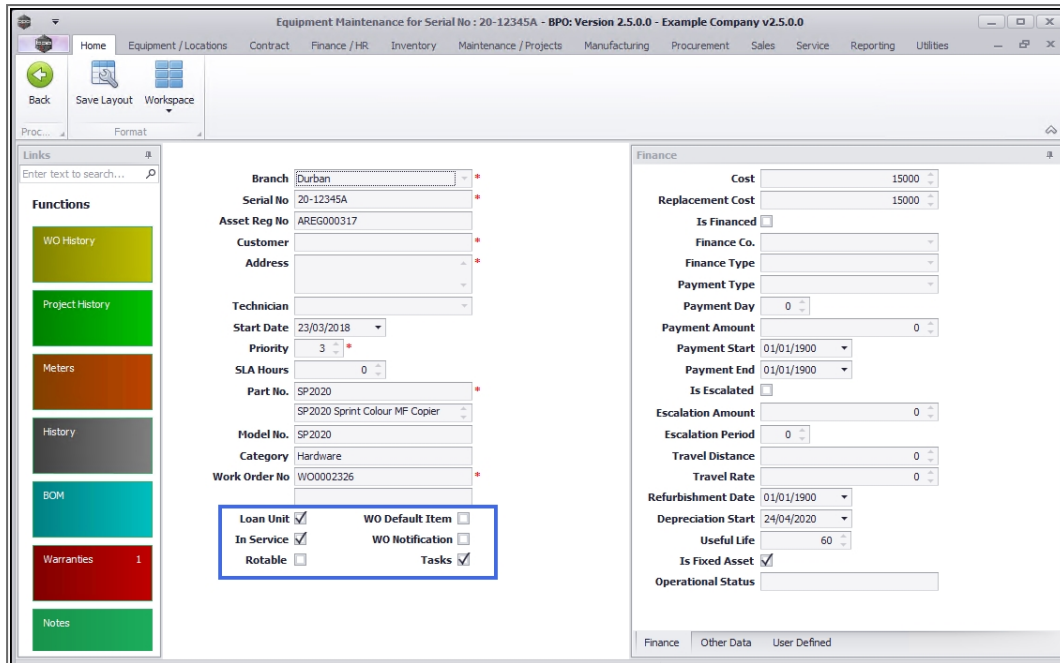
The screenshot shows the 'Equipment Maintenance' form for Serial No: 20-12345A. The form is divided into several sections. On the left, there's a 'Functions' sidebar with options like WO History, Project History, Meters, History, BOM, Warranties, and Notes. The main form area contains fields for Branch (Durban), Serial No (20-12345A), Asset Reg No (AREG000317), Customer, Address, Technician, Start Date (23/03/2018), Priority (3), SLA Hours (0), Part No (SP2020 Sprint Colour MF Copier), Model No (SP2020), Category (Hardware), and Work Order No (WO0002326). Below these are checkboxes for Loan Unit (checked), In Service (checked), Rotable (unchecked), WO Default Item (unchecked), WO Notification (unchecked), and Tasks (checked). On the right, the 'Finance' section includes fields for Cost (15000), Replacement Cost (15000), Is Financed (unchecked), Finance Co., Finance Type, Payment Type, Payment Day (0), Payment Amount (0), Payment Start (01/01/1900), Payment End (01/01/1900), Is Escalated (unchecked), Escalation Amount (0), Escalation Period (0), Travel Distance (0), Travel Rate (0), Refurbishment Date (01/01/1900), Depreciation Start (24/04/2020), Useful Life (60), Is Fixed Asset (checked), and Operational Status.

All Internal Assets no matter which Parent Type they are linked to, display the following:

## ASSET DETAILS CHECK BOXES

- **Loan Unit:** Select this check box if this is a loan machine to be issued and sent out to a client whilst their machine is being repaired

- **In Service:** Select this check box to indicate whether this machine falls within a Service plan and needs to be periodically serviced. (Similar to a vehicle having a service plan.) *This functionality is not currently in use in BPO2.*
- **Rotable:** Select this check box to indicate whether this machine is included in a rotable service plan. Rotable 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. *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 [Introduction to Tasks](#) for more information.



The screenshot shows the 'Equipment Maintenance for Serial No : 20-12345A - BPO: Version 2.5.0.0 - Example Company v2.5.0.0' window. The 'Finance' frame is active, displaying various financial details for the asset. The 'Loan Unit' checkbox is checked, and the 'WO Default Item' checkbox is unchecked. The 'In Service' checkbox is checked, and the 'WO Notification' checkbox is unchecked. The 'Rotable' checkbox is unchecked, and the 'Tasks' checkbox is checked. The 'Finance' frame also displays fields for Cost, Replacement Cost, Is Financed, Finance Co., Finance Type, Payment Type, Payment Day, Payment Amount, Payment Start, Payment End, Is Escalated, Escalation Amount, Escalation Period, Travel Distance, Travel Rate, Refurbishment Date, Depreciation Start, Useful Life, Is Fixed Asset, and Operational Status.

## 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:

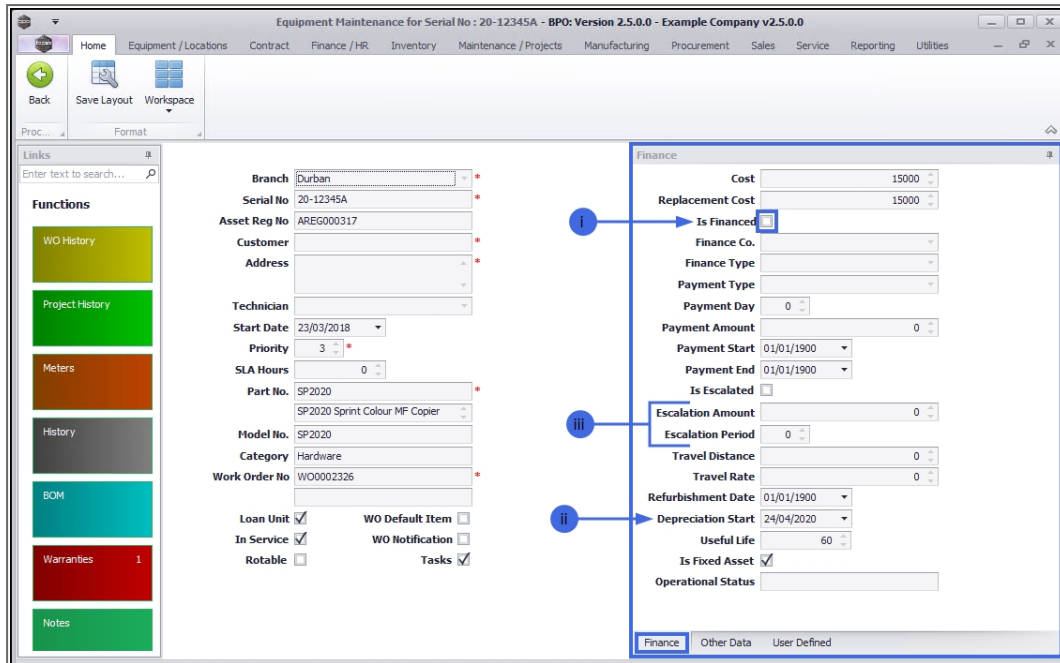
- Whether the equipment item is **financed**.
- Whether a **depreciation method** has been applied to this equipment item.
- Whether an **escalation amount** and **period** have been applied to this equipment item.

- **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 [client owned asset](#)).
- **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 [depreciation](#), if it is enabled.
- **Is Fixed Asset:** This check box will be auto-ticked as this is 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.

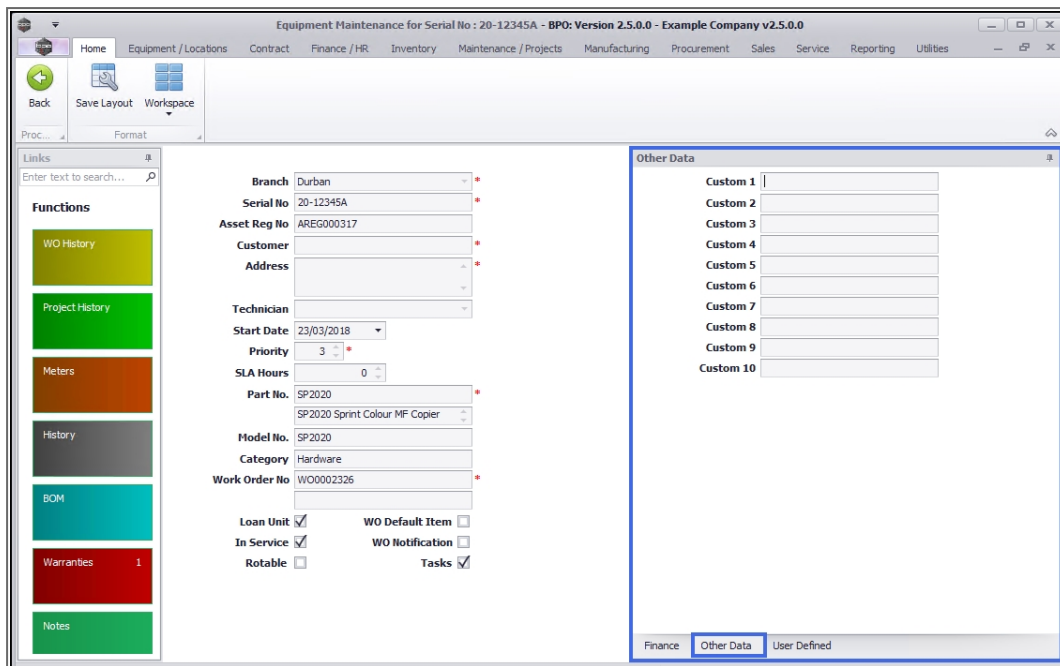




## OTHER DATA FRAME

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 an internal asset.
  - **Note 1:** These field labels can be *re-named* to suit your company requirements).
  - **Note 2:** As this is the view only screen you cannot add or edit the fields from here. Information can be added via the [Add](#) or [Edit](#) buttons in the *Machine List for []* screen.

For more information refer to [Other Data](#).



## 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.
3. However, the **Variable Values** selected for each User Defined field will be unique 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 [Add](#) or [Edit](#) User Defined.

Equipment Maintenance for Serial No : 20-12345A - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save Back Save Layout Workspace

Process Format

Links  
Enter text to search...

**Functions**

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

**Branch** Durban

**Serial No** 20-12345A

**Asset Reg No** AREG000317

**Customer**

**Address**

**Technician**

**Start Date** 23/03/2018

**Priority** 3

**SLA Hours** 0

**Part No.** SP2020  
SP2020 Sprint Colour MF Copier

**Model No.** SP2020

**Category** Sprint Copiers

**Work Order No** WO0002326

**Loan Unit** ☒ **WO Default Item** ☐

**In Service** ☒ **WO Notification** ☐

**Rotable** ☐ **Tasks** ☒

**User Defined**

Drag a column header here to group by that column

Code	CodeDescription	VariableValue
001	Model Specific Item	
PCPS	Printed Copies Per Second	
SBW	Machine Standby Wattage	
UDS	User-definable Scaling	
U-dS	User-definable Scaling	

Finance Other Data User Defined

MNU.007.038

