

# **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 <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 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.

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



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

### **SELECT THE SITE**

- 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.

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

Home Equipm	nent / Locations				n - BPO: Version 2. Maintenance / Project				2.5.0.0 rement Sales	Service	Reporting	Utilities	- 8	x
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inks #			by that column	A C I	All Client Machines Internal Assets									
iter text to search p	AssetRegNo	PartCode	Description	S	Serialised Stock	5	Type	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset	V
Functions	P =00	RIC	REC					R C	R E C	R E C	-	8 <b>0</b> C	REC	F
	123	SP2020	SP2020 Sprint					SP2020	20-12345-5689	A	03/05/2019	Yes	Yes	1
WO History		SP1919	SP 19 19 Sprint	x		10		1919	19-12345	A	16/04/2018	No	Yes	P
		SP1818	Sprint copier		Hardware	CTRT			18-30200	A	16/03/2015	No	Yes	P
		SP1919	SP 19 19 Sprint	Colour MFC	Hardware	WKOR		1919	20-857485	A	02/05/2017	Yes	Yes	1
Project History		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	CTRT		SP2020	abc147a	A	08/01/2018	No	Yes	1
		SP1919	SP 19 19 Sprint	Colour MFC	Hardware	WKOR.		1919	cvb123	Α	07/05/2014	No	Yes	1
		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	CTRT		SP2020	2020-102040	Α	30/10/2017	No	Yes	P
Meters		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	CTRT		SP2020	2020-102041	Α	17/11/2017	No	Yes	P
		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	CTRT		SP2020	2020-102042	Α	03/07/2014	Yes	Yes	P
		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	CTRT		SP2020	2020-102043	Α	06/07/2015	Yes	Yes	1
History		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	WKOR		SP2020	2020-102044	Α	03/07/2014	No	Yes	P
ristory		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	WKOR		SP2020	2020-102045	Α	03/07/2014	No	Yes	1
		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	CTRT		SP2020	2020-102046	Α	03/07/2014	No	Yes	1
		SP2020	SP2020 Sprint	Colour MF C	opier Hardware	CTRT		SP2020	2020-102048	Α	03/07/2014	Yes	Yes	P
BOM		SP19-123456	SP19-12 Colou	ır Copier	Hardware	WKOR		SP 19-12	1912-102040	Α	03/07/2014	No	No	P
		SP19-123456	SP19-12 Colou	ır Copier	Hardware	WKOR		SP 19-12	1912-102041	Α	03/07/2014	No	No	P
		SP19-123456	SP19-12 Colou	ır Copier	Hardware	WKOR		SP 19-12	1912-102044	Α	16/04/2018	No	No	P
Warranties		SP19-123456	SP19-12 Colou	Ir Copier	Hardware	CTRT		SP 19-12	1912-102045	Α	03/07/2014	No	Yes	P
		SP19-123456	SP19-12 Colou	ır Copier	Hardware	CTRT		SP19-12	1912-102046	A	03/07/2014	No	Yes	P
		SP19-123456	SP19-12 Colou	Ir Copier	Hardware	CTRT		SP19-12	1912-102047	A	03/07/2014	No	Yes	P
Notes		SP19-123456	SP 19-12 Colou	Ir Copier	Hardware	CTRT		SP19-12	1912-102048	A	03/07/2014	No	Yes	1
		SP1818	Sprint copier		Hardware	WKOR			TEST 123-789	A	30/07/2014	No	No	P

### **INTERNAL ASSET – PARENT TYPES**

1. 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;
- i. CTRT Contract
- ii. WHSE Warehouse
- iii. 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.

<b>₩</b>			Machine List for Durban -	BPO: Version 2.	5.0.0 - Examp	le Company	v2.5.0.0					
Home Equipm	ent / Locations	Contract Fir	nance / HR Inventory Main	tenance / Project	s Manufact	turing Prod	urement Sales	Service	Reporting	Utilities		2
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nter text to search P	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	<ul> <li>Asset</li> </ul>	IsFixedAsset	W
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	123	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-12345-5689	A	03/05/2019	Yes	Yes	No
WO History	AREG000007	SP 1020	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	N
	AREG000353	2020-856	Drum	Accessories	WHSE		856-121212	A	22/05/2018	No	Yes	N
Project History	AREG000357	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	cheesy4 ii	A	22/05/2018	Yes	Yes	N
	AREG000333	AT500	AT500 Copier	Hardware	WKOR	AT500	987	A	25/04/2018	Yes	Yes	N
	AREG000325	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-104	A	25/04/2018	Yes	Yes	N
Meters	AREG000322	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-101	Α	25/04/2018	No	Yes	No
	AREG000318	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	TEST147258	Α	16/04/2018	No	Yes	N
		SP 19 19	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	19-12345	Α	16/04/2018	No	Yes	N
History	AREG000317	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	20-12345	Α	23/03/2018	Yes	Yes	N
r iiscory.	AREG000315	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-600-900	Α	19/03/2018	No	Yes	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	abc147a	Α	08/01/2018	No	Yes	N
	AREG000013	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-147	Α	06/12/2017	No	Yes	No
вом		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-10702	Α	05/12/2017	No	Yes	N
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102041	Α	17/11/2017	No	Yes	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102040	Α	30/10/2017	No	Yes	N
Warranties	AREG000295	TMACH	Test Machine	Hardware	WKOR		tmach00000700	Α	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	2020-111STC	Α	20/07/2017	No	Yes	No
Notes	AREG000262	SP 18 18	Sprint copier	Hardware	WHSE		2020-9867LU	Α	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 <u>Parent Type</u> of this asset. In this example it is: **CTRT** Contract.
- 4. Click on *View*.



Home Equi	pment / Locations		<ul> <li>Machine List for Durban - BF</li> </ul>	vo: version 2.5.	Manufactu			Camilan	Reporting	Utilities	2	
		Contract Finar	nce / HR Inventory Mainte	nance / Projects	~	ring Procu		Service	Reporting	Duilues		
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iter text to search 2	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate •	Asset	IsFixedAsset	
Functions	P = 0:	a <b>n</b> c	R <mark>I</mark> C	* <b>0</b> ¢	REC	-0:	R D C	8 <b>0</b> 0	-	a 🛛 c	REC	
	123	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-12345-5689	A	03/05/2019	Yes	Yes	
	AREG000007	SP 1020	Copier	Hardware	CTRT	SP 1020	1020-10102	A	15/11/2018	No	Yes	
	AREG000376	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	SP2020-147852	A	19/09/2018	No	Yes	
	AREG000353	2020-856	Drum	Accessories	WHSE		856-121212	A	22/05/2018	No	Yes	
Project History	AREG000357	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	cheesy4	A	22/05/2018	Yes	Yes	
	AREG000333	AT500	AT500 Copier	Hardware	WKOR	AT500	987	Α	25/04/2018	Yes	Yes	
	AREG000325	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-104	Α	25/04/2018	Yes	Yes	
Meters	AREG000322	AT500	AT500 Copier	Hardware	WKOR	AT500	AT500-101	Α	25/04/2018	No	Yes	
	AREG000318	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	TEST 147258	Α	16/04/2018	No	Yes	
		SP1919	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	19-12345	Α	16/04/2018	No	Yes	
History	AREG000317	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	20-12345	Α	23/03/2018	Yes	Yes	
r listor y	AREG000315	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-600-900	Α	19/03/2018	No	Yes	
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	abc147a	Α	08/01/2018	No	Yes	
0001	AREG000013	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-147	Α	06/12/2017	No	Yes	
BOM		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP 19-12	1912-10702	Α	05/12/2017	No	Yes	
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102041	A	17/11/2017	No	Yes	
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102040	A	30/10/2017	No	Yes	
Warranties	AREG000295	TMACH	Test Machine	Hardware	WKOR		tmach00000700	A	08/08/2017	No	Yes	
	AREG000292	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-606060	A	03/08/2017	No	Yes	
	AREG000263	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-111STC	A	20/07/2017	No	Yes	
Notes	AREG000262	SP1818	Sprint copier	Hardware	WHSE		2020-9867LU	A	30/06/2017	No	Yes	
	AREG000241	SP1818	Sprint copier	Hardware	WKOR		1818-8594	A	01/06/2017	Yes	Yes	

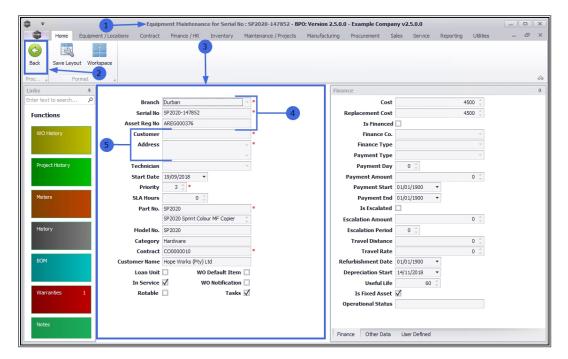
- 1. The *Equipment Maintenance for Serial No: []* screen will open.
- 2. You will note that there is only a *Back* button. This is because this is a <u>view only</u> screen, no changes can be made in this screen.

#### **VIEW ASSET DETAILS**

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



- **Customer**: This field will be <u>blank</u> for an Internal Asset.
  - (This field will <u>only</u> 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 <u>blank</u> for an Internal Asset.
  - (This field will <u>only</u> be populated with the address of the client - as above - if this is a Client Machine.)



- 1. The following fields are used across <u>all</u> 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**

- 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.

<b>⊕ =</b>	Equipment Mainter	ance for Serial No : SP2020-147852 - B	PO: Version 2.5.0.0 - Example Compa	ny v2.5.0.0	_ <b>– ×</b>
Home Equipment / Location	ns Contract Finance / H	R Inventory Maintenance / Projects	Manufacturing Procurement S	ales Service Reporting Utilities	_ & ×
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	Address	*	Finance Type	Ψ.	
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	Start Date 19/09/2018	-	Payment Amount	0 🗘	
	Priority 3 🌲 *		Payment Start	01/01/1900 -	
Meters			Payment End		
	Part No. SP2020	•	Is Escalated		
	SP2020 Sprint	Colour MF Copier 👙	Escalation Amount	0 ‡	
History	Model No. SP2020		Escalation Period	0 🗘	
	Category Hardware		Travel Distance	0 ‡	
	Contract CO0000010	*	Travel Rate	0 ‡	
BOM Cu	stomer Name Hope Works (P		Refurbishment Date	01/01/1900 -	
		WO Default Item 🔲	Depreciation Start		
	In Service 🗸	WO Notification	Useful Life	60 🌲	
Warranties 1	Rotable	Tasks 🖌	Is Fixed Asset	$\checkmark$	
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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 <u>Parent Type</u> of this asset. In this example, it is: **WHSE** Warehouse.
- 4. Click on View.

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ter text to search	~	A	ssetRegNo 🔺	PartCode	Description		CategoryDesc	ParentT	ype	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset	WO
Functions		9 8	8 C	8 C	8 <b>8</b> 0		8 C	* <b>0</b> 0		8 B C	8 <b>8</b> 0	880	-	REC	8 C	880
		A	REG000205	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	CTRT	``	SP2020	320AREG000205	A	19/05/2017	No	Yes	No
		A	REG000213	SP2121	SP2121 Copi	er	Hardware	WKOR	`	、 、	328AREG000213	A	22/05/2017	No	Yes	No
		A	REG000214	SP1818	Sprint copier		Hardware	WKOR		N	1818-9999	Α	23/05/2017	Yes	Yes	No
		A	REG000218	SP1818	Sprint copier		Hardware	WKOR		3	1818-5555	A	23/05/2017	No	Yes	No
Project History		A	REG000219	SP1818	Sprint copier		Hardware	CTRT		<b>Y</b>	1818-4444	A	23/05/2017	No	Yes	No
		A	REG000220	2020-856	Drum		Accessories	CTRT		1	2020-4327	A	23/05/2017	No	Yes	No
		A	REG000222	2020-856	Drum		Accessories	CTRT			2020-4329	A	23/05/2017	No	Yes	No
Meters		A	REG000241	SP1818	Sprint copier		Hardware	WKOR	¥		1818-8594	A	01/06/2017	Yes	Yes	No
		► A	REG000262	SP1818	Sprint copier		Hardware	WHSE			2020-9867LU	А	30/06/2017	No	Yes	No
		A	REG000263	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	WKOR		SP2020	2020-111STC	A	20/07/2017	No	Yes	No
1 Pakana		TA	REG000292	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	CTRT		SP2020	2020-606060	A	03/08/2017	No	Yes	No
History		A	REG000295	TMACH	Test Machine	2	Hardware	WKOR			tmach00000700	Α	08/08/2017	No	Yes	No
		A	REG000315	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	WKOR		SP2020	2020-600-900	A	19/03/2018	No	Yes	No
	_	2 A	REG000317	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	WKOR		SP2020	20-12345	A	23/03/2018	Yes	Yes	No
BOM		2 A	REG000318	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	CTRT		SP2020	TEST147258	A	16/04/2018	No	Yes	No
		A	REG000322	AT500	AT500 Copie	r	Hardware	WKOR		AT500	AT500-101	Α	25/04/2018	No	Yes	No
		A	REG000325	AT500	AT500 Copie	r	Hardware	WKOR		AT500	AT500-104	A	25/04/2018	Yes	Yes	No
Warranties		A	REG000333	AT500	AT500 Copie	r	Hardware	WKOR		AT500	987	Α	25/04/2018	Yes	Yes	No
		A	REG000353	2020-856	Drum		Accessories	WHSE			856-121212	Α	22/05/2018	No	Yes	No
		A	REG000357	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	WKOR		SP2020	cheesy4	A	22/05/2018	Yes	Yes	No
Notes		A	REG000376	SP2020	SP2020 Sprin	nt Colour MF Copier	Hardware	CTRT		SP2020	SP2020-147852	A	19/09/2018	No	Yes	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 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 Ware-house*.

4							
		oment Maintenance for Serial No					
Home Equipm	ent / Locations Contract	Finance / HR Inventory I	Maintenance / Projects	Manufacturing Procurement	Sales Service	Reporting Utilities	- & ×
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Enter text to search P	Branch		* *		Cost	5000 🤤	
Functions		2020-9867LU	*	Replacement (		5000 🌻	
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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.
- Take note of the <u>Parent Type</u> of this asset. In this example, it is: **WKOR** Work Order.
- 4. Click on View.

Home Eq	uipmen	t / Locations	Contract Fina	ance / HR. Inventory Main	tenance / Projects	Manufact	uring Proc	urement Sales	Servio	e Reporting	Utilities		8
dd Edit Delete	Viev	Save Layour	t Workspaces	U	Refresh	Revalue Conv	vert Buy Bad	k Print Expo		eports			
Maintenance			4 ormat	Current	t 4	Proce	ess	, Print	, Re	ports ⊿			
ks													
ter text to search	2	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	<ul> <li>Asset</li> </ul>	IsFixedAsset	W
unctions	9	* #BC	REC	8 <b>8</b> 0	REC	*Bc 下	RBC	REC	RBC	-	REC	RBC	88
		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	SP 1020	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	3	856-121212	A	22/05/2018	No	Yes	No
Project History		AREG000357	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	cheesy4	A	22/05/2018	Yes	Yes	No
	2	AREG000333	AT500	AT500 Copier	Hardware	WKOR	AT500	987	A	25/04/2018	Yes	Yes	No
		AREG000325	AT500	AT500 Copier	Hardware	WKOR	AT 500	AT500-104	A	25/04/2018	Yes	Yes	No
Meters		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	Α	16/04/2018	No	Yes	No
			SP1919	SP1919 Sprint Colour MFC	Hardware	CTRT 🕨	1919	19-12345	A	16/04/2018	No	Yes	No
1 Palance	•	AREG000317	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	20-12345A	A	23/03/2018	Yes	Yes	No
History		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
BOM			SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-10702	Α	05/12/2017	No	Yes	No
			SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102041	Α	17/11/2017	No	Yes	No
			SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102040	Α	30/10/2017	No	Yes	No
Warranties		AREG000295	TMACH	Test Machine	Hardware	WKOR		tmach00000700	Α	08/08/2017	No	Yes	No
		AREG000292	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-606060	Α	03/08/2017	No	Yes	No
		AREG000263	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-111STC	Α	20/07/2017	No	Yes	No
Notes		AREG000262	SP1818	Sprint copier	Hardware	WHSE		2020-9867LU	Α	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.

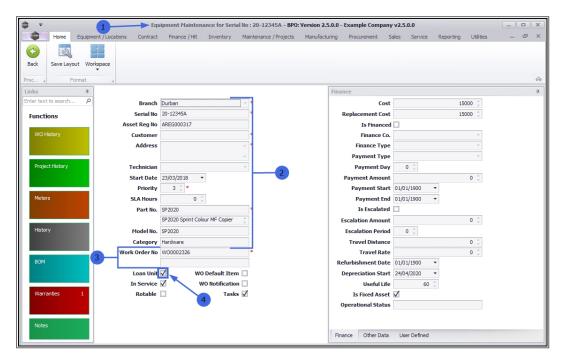
#### **VIEW ASSET DETAILS**

 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.



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 <u>Introduction to Tasks</u> for more information.



<b>• •</b>		Eq	uipment Maintenance for Serial No	o : 20-12345A - BPO: Version 2	5.0.0 - Example Company	v2.5.0.0	_ <b> </b>
	Home Equipm	ent / Locations Contract	Finance / HR Inventory Ma	aintenance / Projects Manufact	turing Procurement S	ales Service Reporting Utilitie	в _ в ×
Back Sa	ave Layout Wo	rkspace					
Proc a	Format	4					
Links	<b>д</b>				Finance		4
Enter text to :	search P	Branch	3	*	Cost	15000 🌲	
Function	15	Serial No	20-12345A	•	Replacement Cost	15000 🌲	
		Asset Reg No	AREG000317		Is Financed		
WO Histo	ory	Customer		•	Finance Co.	Υ	
		Address	A	*	Finance Type	Ψ	
			Ÿ		Payment Type	· · · · · · · · · · · · · · · · · · ·	
Project H	History	Technician	~		Payment Day	0 ≑	
		Start Date			Payment Amount	0 🗘	
		Priority	3 🗘 *		Payment Start		
Meters		SLA Hours	0 👙		Payment End		
		Part No.		•	Is Escalated		
History			SP2020 Sprint Colour MF Copier	-	Escalation Amount	0 +	
HISLOTY		Model No.			Escalation Period	0 🗘	
		Category Work Order No			Travel Distance Travel Rate	0 0	
BOM		work Order No	W00002326		Refurbishment Date		
20011		Loan Unit	W0 Default Item		Depreciation Start		
		In Service		· · · · · · · · · · · · · · · · · · ·	Useful Life	60 <sup>^</sup>	
Warrantie	ies 1	Rotable			Is 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 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.



<b>\$</b> =	Equ	ipment Maintenance for Serial N	o : 20-12345A - BPO: Version 2.5.	0.0 - Example Company	v2.5.0.0	_ <b>– ×</b>
Home Equipment	nt / Locations Contract	Finance / HR Inventory M	laintenance / Projects Manufactur	ring Procurement Sa	ales Service Reporting Utilities	@ ×
Back Save Layout Work	space					
Proc Format	4					\$
Links 4				Finance		4
Enter text to search P	Branch	Durban		Cost	15000 🌲	
Functions	Serial No	20-12345A	•	Replacement Cost	15000 🌲	
	Asset Reg No	AREG000317		Is Financed		
WO History	Customer		•	Finance Co.	×	
	Address	A	. •	Finance Type		
		~		Payment Type	Ψ	
Project History	Technician		r	Payment Day	0 ‡	
	Start Date	23/03/2018 -		Payment Amount	0 🖕	
	Priority	3 🗘 *		Payment Start	01/01/1900 -	
Meters	SLA Hours	0 🌐		Payment End	01/01/1900 -	
	Part No.	SP2020	•	Is Escalated		
		SP2020 Sprint Colour MF Copier 🔶		Escalation Amount	0 📮	
History	Model No.	SP2020		Escalation Period	0 🌐	
	Category	Hardware		Travel Distance	0 👙	
	Work Order No	WO0002326	•	Travel Rate	0 🌲	
BOM				Refurbishment Date	01/01/1900 -	
	Loan Unit	W0 Default Item	1 <b>II</b>	Depreciation Start	24/04/2020 -	
	In Service	WO Notification	1	Useful Life	<b>60</b> 🌲	
Warranties 1	Rotable	Tasks 🗸	1	Is Fixed Asset	$\checkmark$	
				Operational 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 an internal asset.
  - 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 in the *Machine List for []* screen.

For more information refer to Other Data.



🗘 🔻 Equ	ipment Maintenance for Serial No : 20-12345A - BPO: V	ersion 2.5.0.0 - Example Company v2.5.0.0	_ <b>—</b> ×
Home Equipment / Locations Contract	Finance / HR Inventory Maintenance / Projects	Manufacturing Procurement Sales Service	e Reporting Utilities — 🗗 🛪
Back Save Layout Workspace			
Proc a Format a			~
Links 4		Other Data	4
Enter text to search P Branch	Durban 👻 🕈	Custom 1	
Functions Serial No	20-12345A *	Custom 2	
Asset Reg No	AREG000317	Custom 3	
WO History Customer	•	Custom 4	
Address	*	Custom 5	
		Custom 6	
Project History Technician	·	Custom 7	
Start Date		Custom 8	
Priority	3 🗘 *	Custom 9	
Meters SLA Hours	0 🌲	Custom 10	
Part No.			
	SP2020 Sprint Colour MF Copier		
History Model No.	SP2020		
Category	Hardware		
Work Order No	WO0002326 *		
BOM			
Loan Unit			
In Service			
Warranties 1 Rotable	Tasks 🗸		
Notes		Finance Other Data User Define	
		Finance Other Data User Define	a

#### **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.

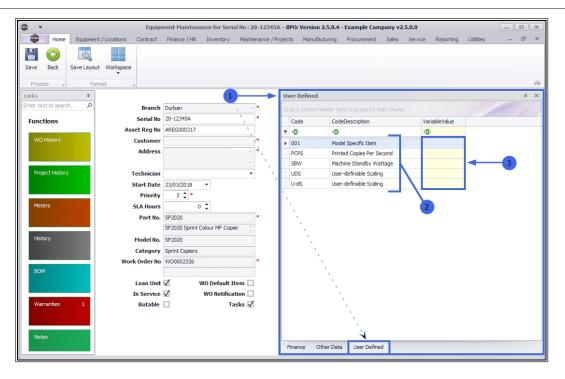
- 2. The added custom fields will reflect in the User Defined panel in the Asset Maintain screen across *all* assets on the system.
- However, the Variable Values selected for each User Defined field will be <u>unique</u> to the selected asset.

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.



#### View Internal Assets



MNU.007.038

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