

EQUIPMENT

ASSETS - EDIT - FINANCE DETAILS

The *finance details* relating to a selected asset may need to be updated during the lifespan of the asset. If your company has security rights configured then you may not be able to edit some, or even all, of these finance details.

Follow the process below to *edit* the **Finance** panel information.

Ribbon Access: Equipment and Locations > Assets



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

THE SITE AND TYPE FILTERS

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

Note: Refer to Site Selection for more information.

3. This screen will open by default in the *All* Type. You do <u>not</u> need to change this *Type* in order to add asset *other data*. 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 *Type* that contains the asset you wish to work with.



SELECT ASSET TO EDIT

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

• •	Home Equipr	ment	/ Locations Co	ntract Finar	Machine List for Durban - BPO ice / HR Inventory Maintena	: Version 2.5.0.4 nce / Projects	- Example C Manufacturing	ompany v2. Procurem	5.0.0 ent Sales	Service i	Reporting Util	ities	
dd Ed	dit Delete	View	Save Layout	Workspaces	Save Filter	R	2 P evalue Conv	ert Buy Bad	Print Exp	ort Re	ports		
nks	arrierance a			Format	Current	4	Froce	55	4 PHIL	Ke;		/	
iter text to	search	5	rag a column head	er here to group	by that column				a . i hi				
			AssetRegNo A	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsse
unction	15	٩	RBC	R	ROC	R C	a 🖬 C	R C	R C	REC	-	REC	R C
			AREG000439	SP2020	SP2020 Sprint Colour MF Copier	Sprint Copiers	WHSE	SP2020	GEO201	A	23/10/2021	No	No
			AREG000440	SP2020	SP2020 Sprint Colour MF Copier	Sprint Copiers	WHSE	SP2020	GEO202	A	23/10/2021	No	No
			AREG000441	SP2020	SP2020 Sprint Colour MF Copier	Sprint Copiers	WHSE	SP2020	GEO203	A	23/10/2021	No	No
			AREG000442	SP2020	SP2020 Sprint Colour MF Copier	Sprint Copiers	WHSE	SP2020	GEO204	A	23/10/2021	No	No
Project History			AREG000443	SP-ABI-CO	Sprint Copier ABI 100 Series	Sprint Copiers	WHSE	ABI 100-1	AB501	Α	25/10/2021	No	No
			AREG000444	SP-ABI-CO	Sprint Copier ABI 100 Series	Sprint Copiers	WHSE	ABI 100-1	AB502	A	25/10/2021	No	No
		•	AREG000445	SP-ABI-CO	Sprint Copier ABI 100 Series	Sprint Copiers	WHSE	ABI 100-1	AB503	A	25/10/2021	No	No
Meters			AREG000446	SP-ABI-CO	Sprint Copier ABI 100 Series	Sprint Copiers	WHSE	ABI 100-1	AB504	A	25/10/2021	No	No
			AREG000447	SP-ABI-CO	Sprint Copier ABI 100 Series	Sprint Copiers	WHSE	ABI 100-1	AB505	Α	25/10/2021	No	No
			AREG000448	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WKOR	1001-A1	AM2000	A	28/10/2021	No	No
History		Ш	AREG000449	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WHSE	1001-A1	AM2001	Α	28/10/2021	No	No
Thistory		4	AREG000450	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WHSE	1001-A1	AM2002	Α	28/10/2021	No	No
			AREG000451	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WHSE	1001-A1	AM2003	Α	28/10/2021	No	No
			AREG000452	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WHSE	1001-A1	AM2004	A	28/10/2021	No	No
BOM			AREG000453	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WHSE	1001-A1	AM2005	A	28/10/2021	No	No
			AREG000454	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WHSE	1001-A1	AM2006	Α	28/10/2021	No	No
			AREG000455	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WHSE	1001-A1	AM2007	Α	28/10/2021	No	No
Warranti	ties		AREG000456	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WKOR	1001-A1	AM2008	A	28/10/2021	No	No
			AREG000457	AM-Copier	AB Marv Multi Copier 1001 Series	Sprint Copiers	WKOR	1001-A1	AM2009	A	28/10/2021	No	No
			AREG000458	SP2020	SP2020 Sprint Colour MF Copier	Sprint Copiers	WHSE	SP2020	000002	Α	03/12/2021	No	No
Notes			SIN123	1458-96523	K147 Kyocera Colour Copier	Kyocera Multif	WHSE	K147	sin 123	А	16/04/2020	No	No
		4											

- 1. The *Equipment Maintenance for Serial no: []* screen will open.
- 2. If the *Finance* frame is not already open, click on the *Finance* tab.
- 3. Edit the required fields:
 - **Cost**: Either type in or use the directional arrows to update the purchase price of the item if applicable.
 - **Replacement cost**: Either type in or use the directional arrows to update the replacement cost of the item if applicable.
 - Is Financed: Tick this check box if the item is financed.
 - **Finance Type**: Click on the drop-down arrow and select the finance type, if applicable.



- **Payment Type**: Click on the drop-down arrow and update the payment type if applicable.
- **Payment Day**: Either type in or use the directional arrows to update the payment day, if applicable.
- **Payment Amount**: Either type in or use the directional arrows to update the payment amount if applicable.
- **Payment Start**: Click on the drop-down arrow and update the payment start date if applicable.
- **Payment End**: Update payment end date if applicable.
- Is Escalated: Update this check box if applicable.
- **Escalation Amount**: Update the escalation amount, if applicable.
- **Escalation Period**: Update the escalation period, if applicable.
- **Travel Distance**: Update the travel distance, if applicable. If a km value is input here, each time a call is logged against the serial number, the system will want to invoice within the closest <u>travel radii</u> (travel zone).
- **Travel Rate**: Update the travel rate, if applicable.
- **Refurbishment Date**: Update the refurbishment date, if applicable.
- **Depreciation Start**: Update depreciation start date, if applicable.
- **Useful Life**: This field cannot be edited from here.
- Is Fixed Asset: This field cannot be edited from here.
- **Operational Status**: Update the operational status, if applicable.
- 4. Place your *cursor* in the finance field where you wish to make changes.
 - In this example, the *Replacement Cost* is to be updated.



(a) =	- BPO: Version 2.5.0.4 - Example Company v2.5.0.0	x		
Home Equipme	nt / Locations Contract	Finance / HR Inventory Maintenance /	Projects Manufacturing Procurement Sales Service Reporting Utilities - d	7 X
Save Back Save Layou	ut Workspace		4	\$
Links 1			Finance	
Enter text to search P	Buanch	Durkan -	Finance Foot	-
	Garial Na	ARE02 *		
Functions	Asset Peg No	AD505	To Financed	
WO History	Customer	*	Finance Co.	
	Address	*	Finance Type	
			Payment Type	
Project History	Technician		Payment Day 0 🗘	
	Start Date	25/10/2021 -	Payment Amount 0 🗘	
	Priority	3 ‡ * 2 →	Payment Start 01/01/1900 -	
Meters	SLA Hours	0 \$	Payment End 01/01/1900 -	
	Part No.	SP-ABI-COP-100-1	Is Escalated	
		Sprint Copier ABI 100 Series 🔨 🌲	Escalation Amount 0 🗘	
History	Model No.	ABI 100-1	Escalation Period 0 🗘	
	Category	Sprint Copiers	Travel Distance 0 🗘	
	Bin	DBN-A1 *	Travel Rate 0 🗘	
BOM	Warehouse	Main Warehouse	Refurbishment Date 01/01/1900 -	
	Loan Unit	WO Default Item	Depreciation Start 25/10/2021 -	
	In Service	WO Notification	Useful Life 60 🌲	
Warranties 1	Rotable	V Tasks V	Is Fixed Asset	
			Operational Status	
Notes				
notes			Finance Other Data User Defined	

You can edit the fields in the following ways:

- *highlight* and *type over* the original text with new information
- *backspace over* and *type in* the new information
- ° **add** new information to the text currently in the field.
- 1. The *Replacement Cost* has been updated to **9250**.
- 2. Note that the following fields are '*greyed out*' and *cannot* be edited:
 - Cost
 - Depreciation Start
 - Useful Life

SAVE EDITED FINANCE DETAILS

 When you finished editing the Finance details, as required, click on Save.



Equipment Maintenance for Serial № : AB503 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0								
Home Equipment / Location	ns Contract Finance / HR	Inventory Maintenance / Pr	ojects Manufacturing	Procurement Sales Service Rep	orting Utilities — 🗗 🔿	×		
Save Back Save Layout Worksp	bace							
Process J Format	4				6	\approx		
Links a			Finance		д	ц.		
Enter text to search P	Branch Durban		Cost	10000 🗘 <				
Functions	Serial No AB503	*	Replacement Cost	9250 🗘 🗧	← 1			
	Asset Reg No AREG000445		Is Financed					
WO History	Customer	*	Finance Co.	•	1			
	Address	÷ *	Finance Type	•				
		Ψ.	Payment Type					
Project History	Technician	•	Payment Day	0 🗘				
	Start Date 25/10/2021	-	Payment Amount	0 ‡				
	Priority 3 🛊 *		Payment Start	01/01/1900 -	2			
Meters	SLA Hours	○ ‡	Payment End	01/01/1900 -				
	Part No. SP-ABI-COP-1	•	Is Escalated					
	Sprint Copier A	BI 100 Series	Escalation Amount	0 ‡				
History	Model No. ABI 100-1		Escalation Period	0 🗘	1			
	Category Sprint Copiers		Travel Distance	0 ‡				
2011	Bin DBN-A1	*	Travel Rate	0 🗘	1			
BOM	Warehouse Main Warehou	se	Refurbishment Date	01/01/1900 -				
	Loan Unit	WO Default Item	Depreciation Start	25/10/2021				
Warranties 1	In Service V		Useful Life	60 🗸				
Waltanues 1	Rotable M	Idsks V	Is Fixed Asset					
			operational Status					
Notes								
			Finance Other Data	User Defined				

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

Related Topics

- Assets Edit Finance Details
- Assets Add Finance Details
- Assets Add Other Data
- Assets Add User Defined

MNU.007.045