

EQUIPMENT

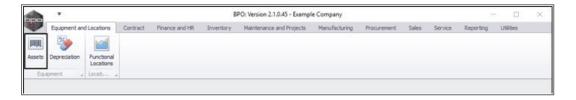
ASSETS - CONVERT ASSET TO STOCK

Stock v **Asset**: A stock item is a serialised item in store ready to be sold. It can be <u>converted into an Asset</u>.

<u>Convert Stock to Asset</u> will set the stock item to an asset. This means that the item will be creating a revenue, for example, a machine for rental purposes.

Convert Asset to Stock will set the serialised item to a stock item. This means that the item will be sold without a rental or service agreement, for example, a machine for sales purposes.

Ribbon Access: Equipment and Locations > Assets

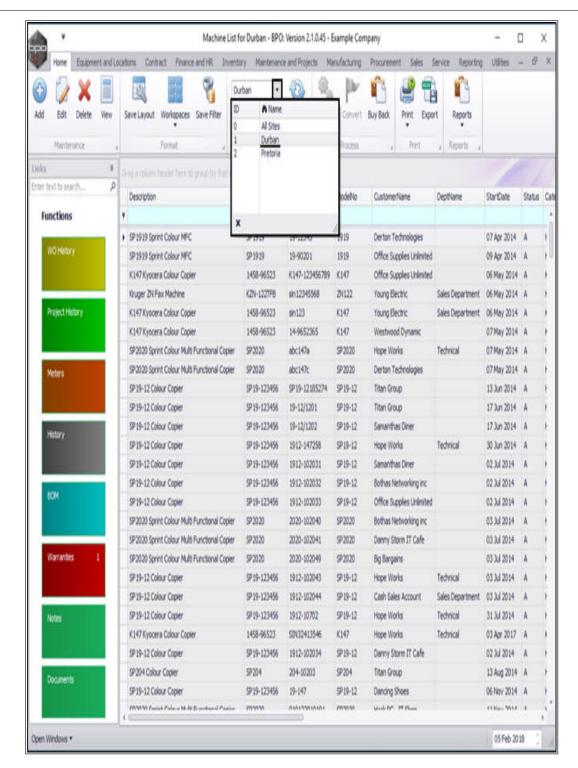


The *Machine Listing for* [] screen will be displayed.

SELECT THE SITE AND STATUS

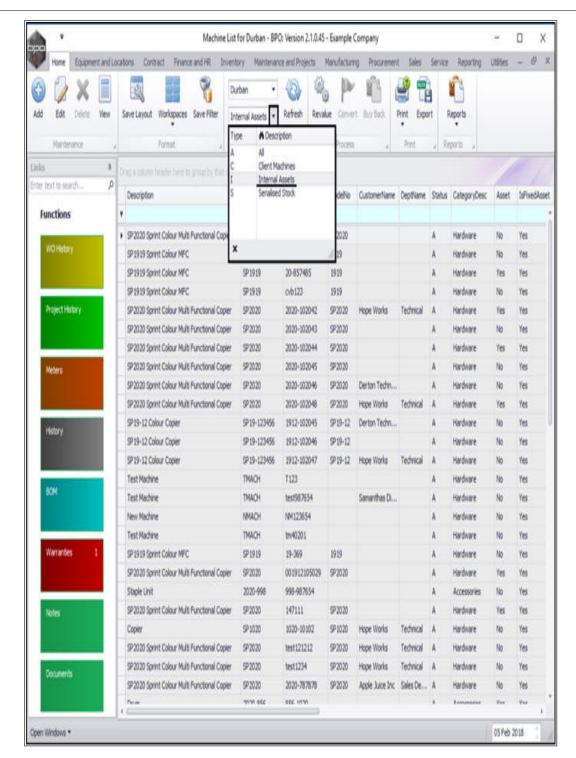
- Select the site.
 - In this image *Durban* has been selected.





- Select the status.
 - This must be set to *Internal Assets*.



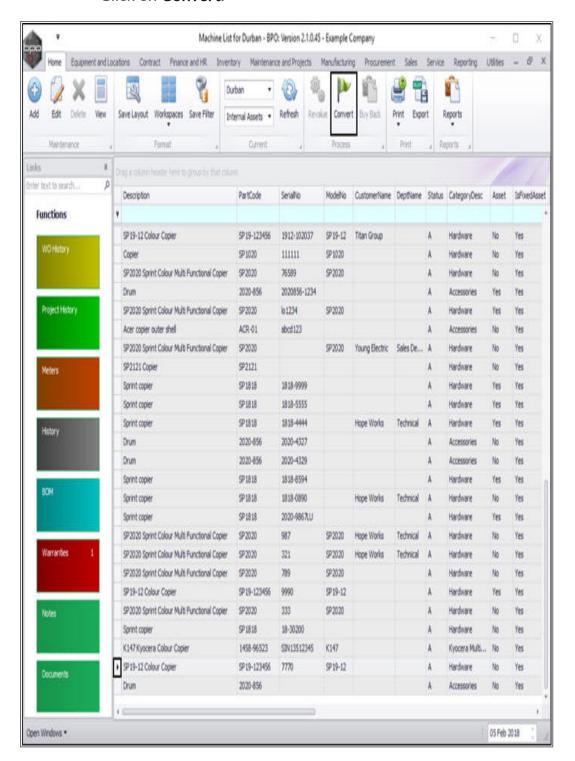


SELECT ASSET TO BE CONVERTED

Either



- Select the **row** of the **serialised item** that you wish to convert from an **internal asset** to **stock**.
- Click on Convert.

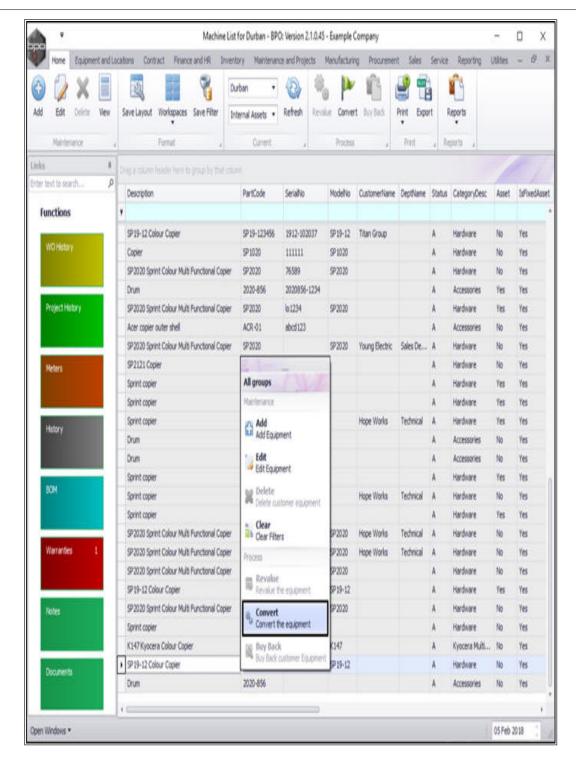




Or

- *Right click* in the *row* of the item that you wish to *convert* from an internal asset to stock.
- A *Maintenance* menu will pop up.
- Click on the *Convert Convert the equipment* option.

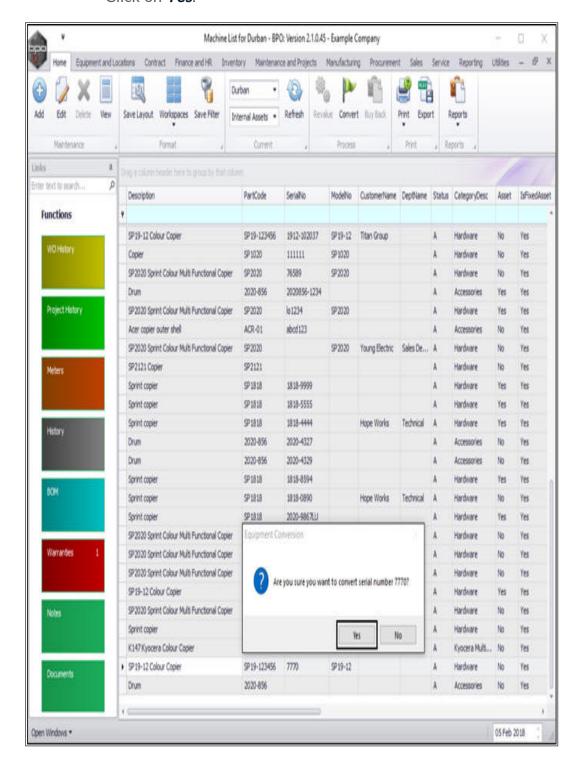




An *Equipment Conversion* message box will appear with the following prompt:



- ° Are you sure you want to convert serial number []?
- · Click on Yes.

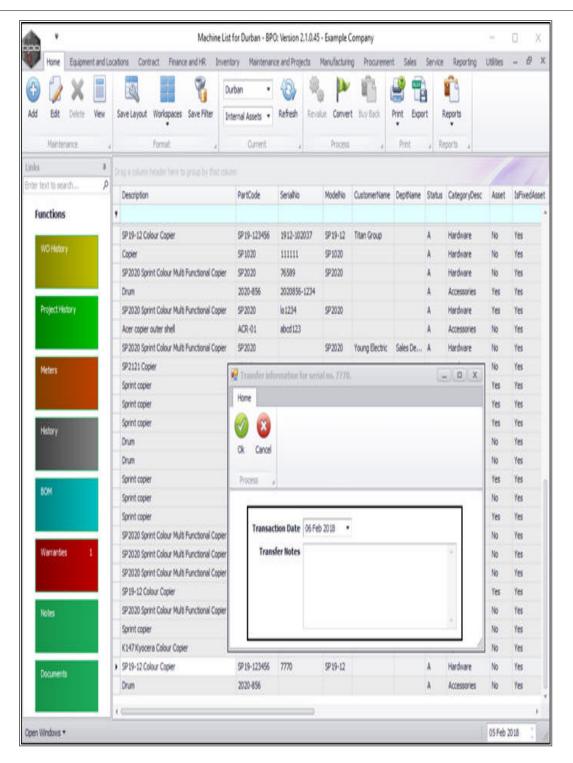




ASSET TRANSACTION DETAILS

- A *Transfer Information for serial no.* [] screen will pop up.
 - Transaction Date: This will populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
 - Transfer Notes: Type in a reason for this item transfer.



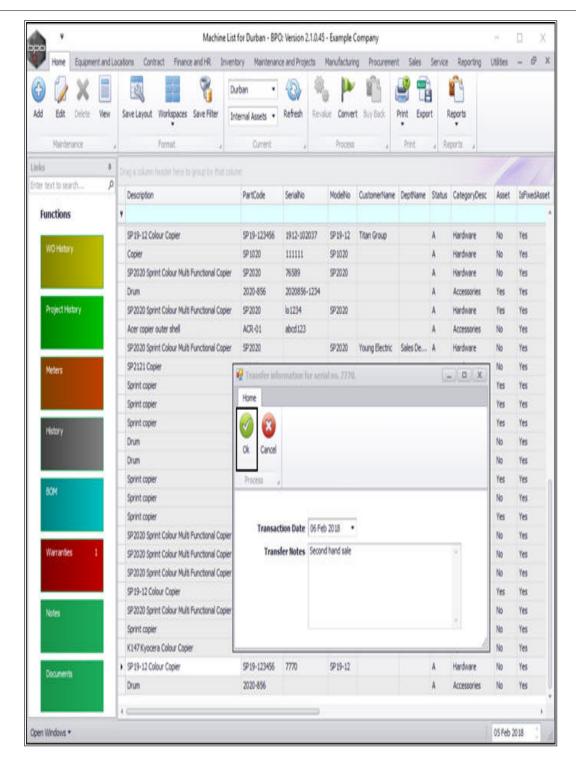




SAVE ASSET CONVERSION

• When you have finished adding the transfer date and note information, click on *Save*.







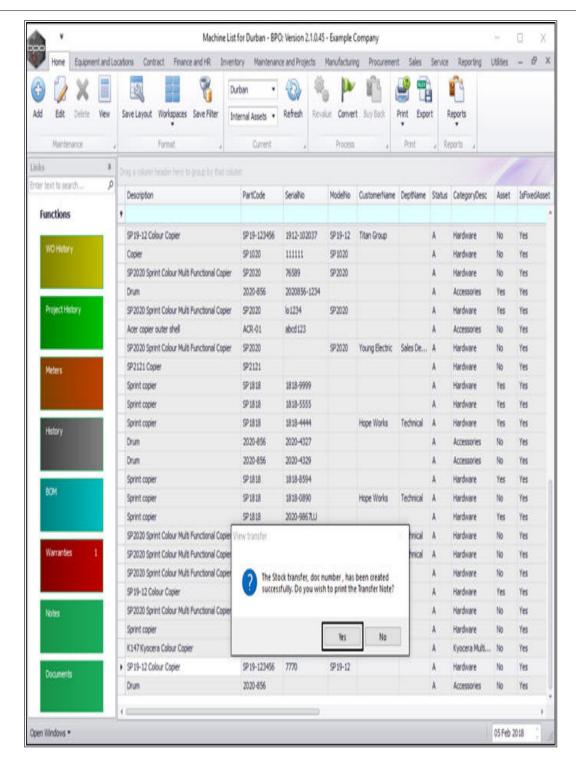
PRINT CONVERSION TRANSFER NOTE

- A *View Transfer* message box will appear with the following prompt:
 - The Stock transfer, doc number, has been created successfully. Do you wish to print the Transfer Note?
 - Click on **Yes** to view the report.

Or.

- Click on No to miss out the next step n this manual.
- In this example, Yes has been selected.





- The Part Transfer Note Report Preview screen will be displayed.
- From here you can *Edit*, *Print*, *Email* or *Export* the document.

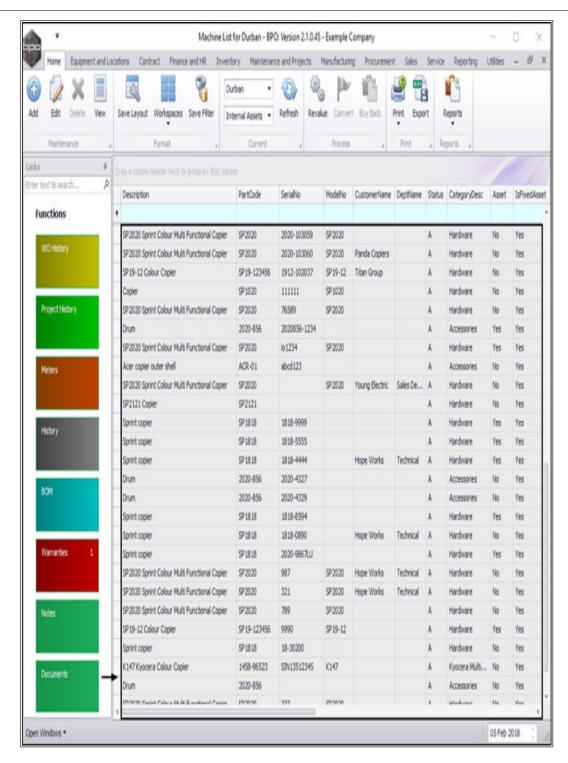


• Close the preview screen when you are finished.



• You will return to the *Machine List for* [] screen where the selected internal asset has now been *removed* from this screen.

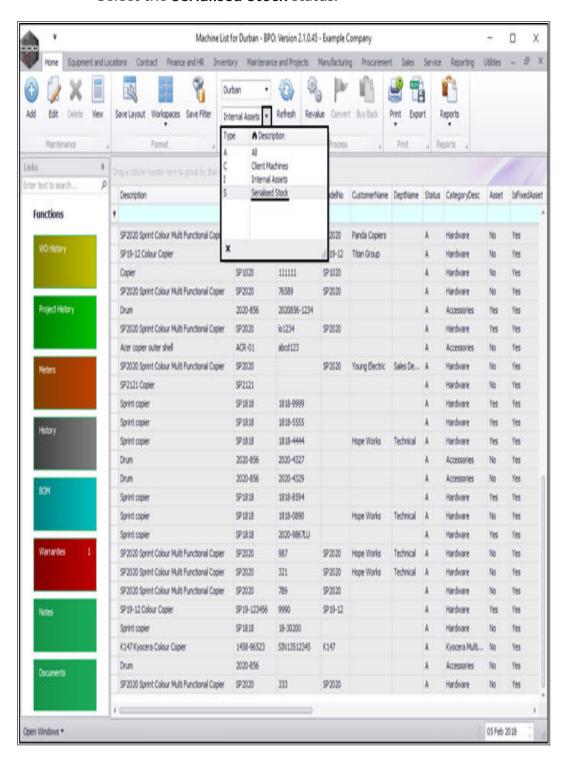






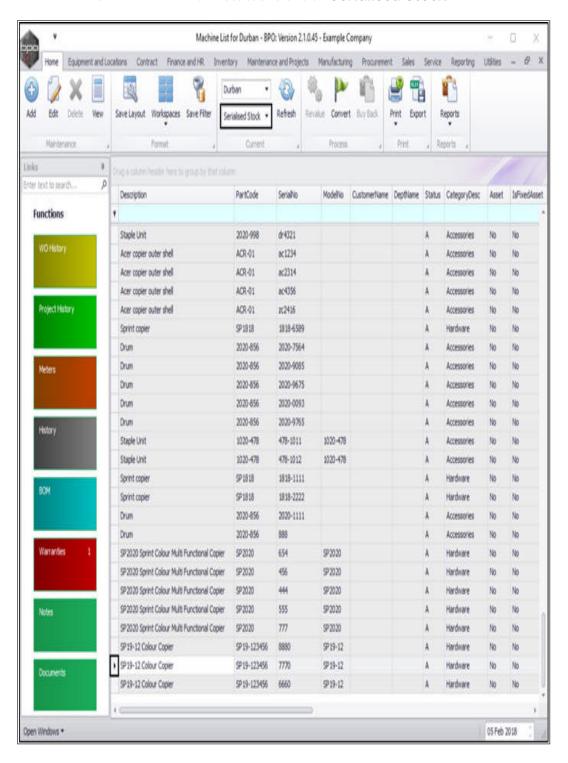
VIEW THE CONVERTED ASSET STATUS

Select the Serialised Stock status.





 You can now view the transferred item in the Machine list for [] screen where the status is set to Serialised Stock.



MNU.011.005