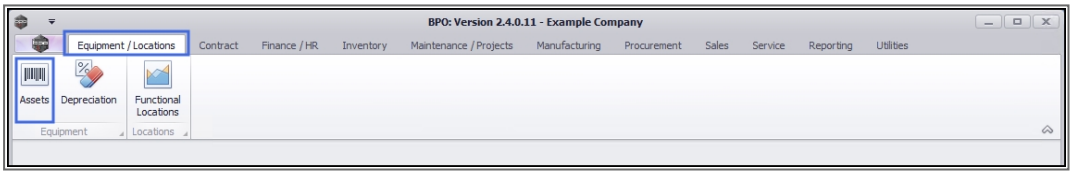
EQUIPMENT

ASSETS – ADD – ASSET DETAILS

A **Customer Asset** should only be added in this manner when a customer brings in a machine, for service or repair, that was bought elsewhere (this would be a Client Owned Asset).

In this process, we will navigate from the **Asset Listing** (*Machine List for []*) screen. A customer asset can also be added from the Customer Listing screen.

Ribbon Access: *Equipment and Locations > Assets*



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

SELECT THE SITE AND STATUS

2. The screen will open with the default Site setting configured on the user.
    - The ***Site*** and ***Status*** do not need to be selected in this screen to continue this process.

Refer to Site Selection for more information.

3. Click on ***Add***.

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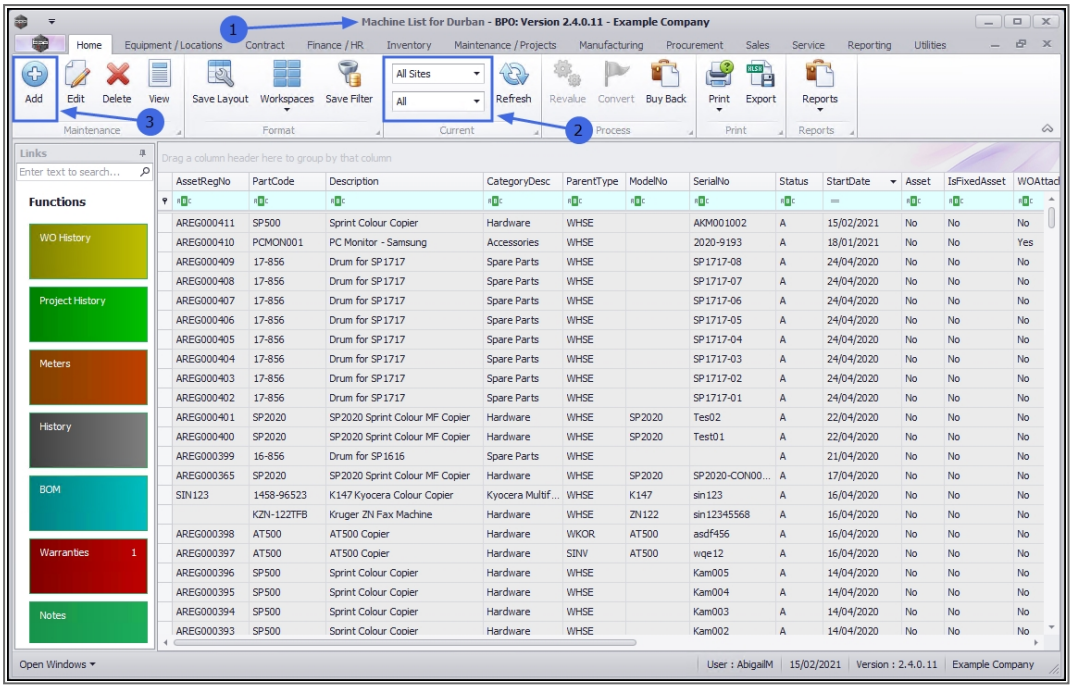

ADD CUSTOMER ASSET DETAILS

1. The **New Equipment** screen will open.
2. Add the customer asset ***details***:
    - **Branch**: The branch or site the customer asset is to be linked to.
    - **Serial No.**: The serial no. of the customer asset.
    - **Asset Register No.**: Type in an alternative asset register number if required. (The asset register no. of the asset is different from the serial no.).
    - **Customer**: Click on the ***search*** button and select from the pop up screen, the name of the client that owns the asset. If the customer is not listed here then follow the process to add a new customer.
    - **Address**: As you select the customer above:
    - **Location**: The ***Select the Location***... screen will pop up as soon as the Customer and Address fields are populated. The

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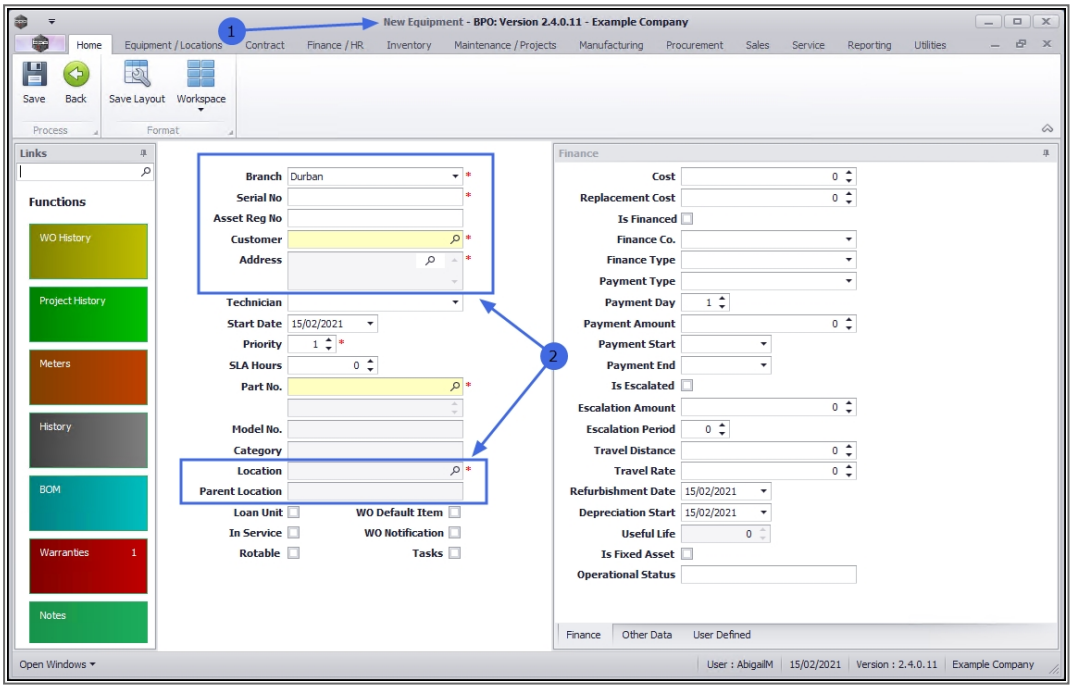
Customer Asset Warehouse bin will be auto selected in this pop-up screen. Click on Ok.

- **Parent Location**: This will auto populate with the warehouse linked to the bin location above.
  - This Address field will auto populate with the address linked to the customer - if there is only one address linked.
  - ***Or*** a **Select** screen will pop up with a list of addresses for this customer - if there is more than one address linked. Select from this list, the correct address.



- **Technician**: Click on the drop-down arrow and link a specific employee to this customer asset, where required. (This will be marked as **'Is Default'** in the employee look-up when assigning a technician).
- **Start Date**: This will auto 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.

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- **Priority**: Either type in or click on the arrow indicators and select an alternative priority number, if required. This is the work order priority of the customer machine service / repair. (1 = Most Important, 5 = Least Important).
- **SLA Hours**: Type in, or use the directional arrows to enter the Service Level Agreement response time to a call logged, in hours.
- **Part No.** and **Description**: Click on the ***search*** button and select from the pop-up screen, the number of the part to be linked as a customer asset. As this number is selected, the second field will populate with the description of the Part No.
- **Model No.**: This will display the model no. linked to the Part No. above, if applicable.
- **Category**: This will populate with the category linked to the part no. above e.g. Hardware.
- **Loan Unit:** As this is a customer machine and not a loan unit, this check box will remain un-ticked.
- **In Service:** Select this check box to indicate whether this asset 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 asset 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).

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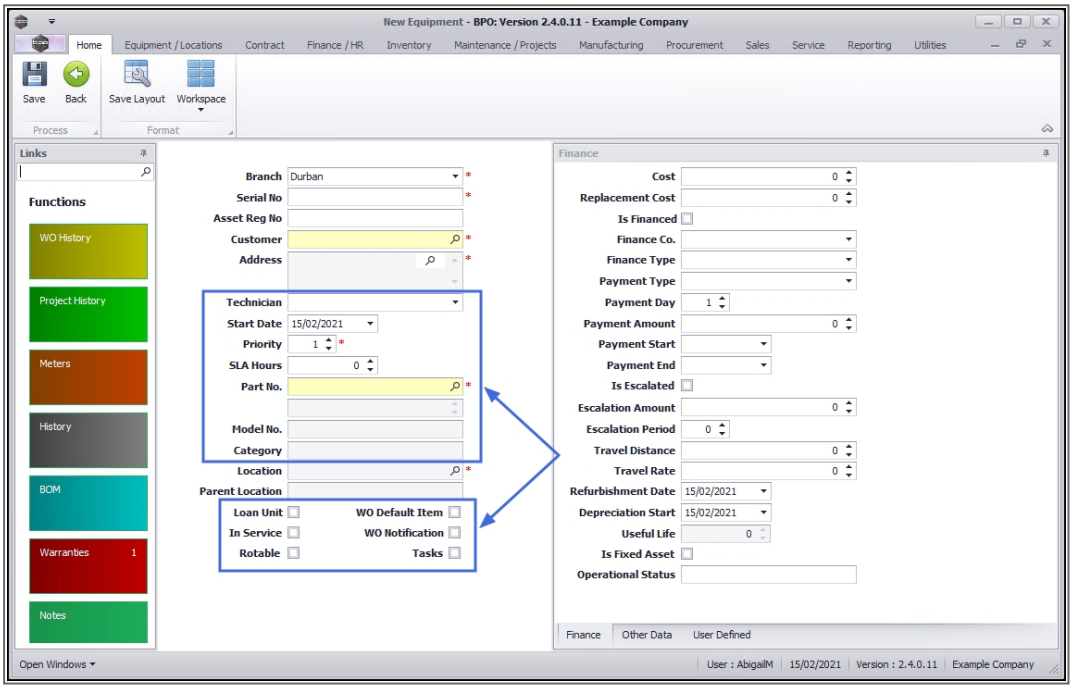
- **WO Notification:** Select this check box to indicate whether this asset is linked to an automated/scheduled task set up. A work order notification will be sent out when the asset is due to be serviced.
- **Tasks:** This check box is related to the above and is linked to the Maintenance / Project screen. Refer to Introduction to Tasks for more information.



1. Once the customer asset details have been added, you can now follow the processes to:
2. Add the asset Finance details
3. Add the asset Other Data and
4. Add the asset User Defined fields, as required,
5. before ***saving*** the new customer asset.

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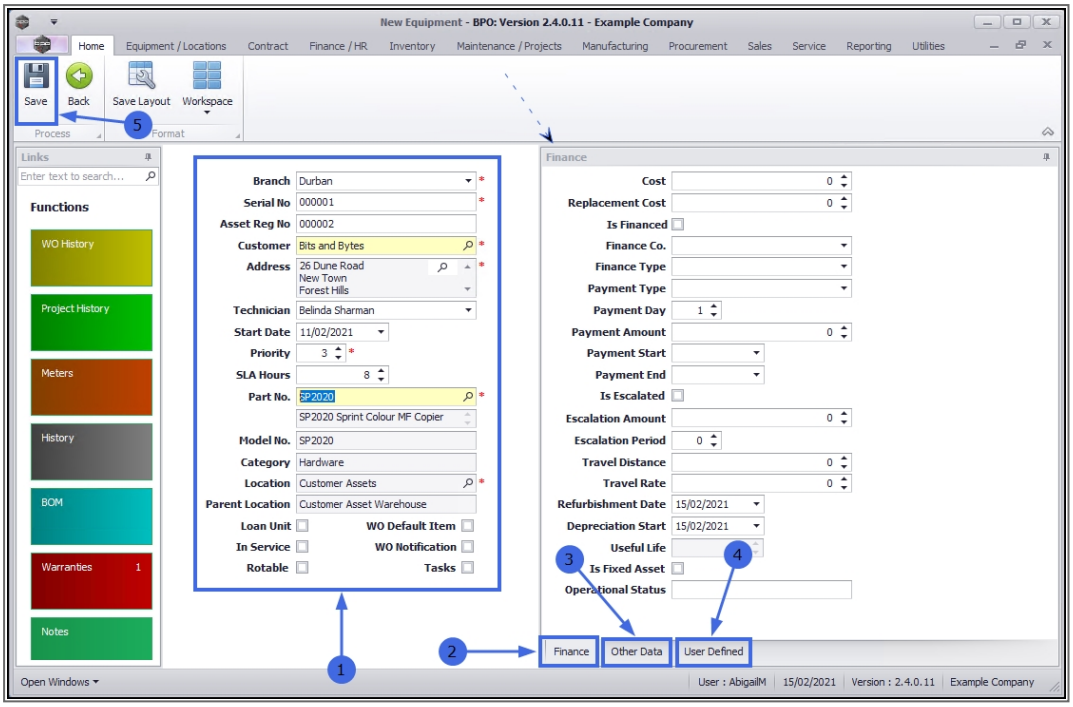

VIEW ADDED CUSTOMER ASSET

1. You will return to the ***Machine List for []*** screen, where, if the status is set to ***All*** or ***Client Machines***,
2. You will be able to view the added customer asset in the data grid.

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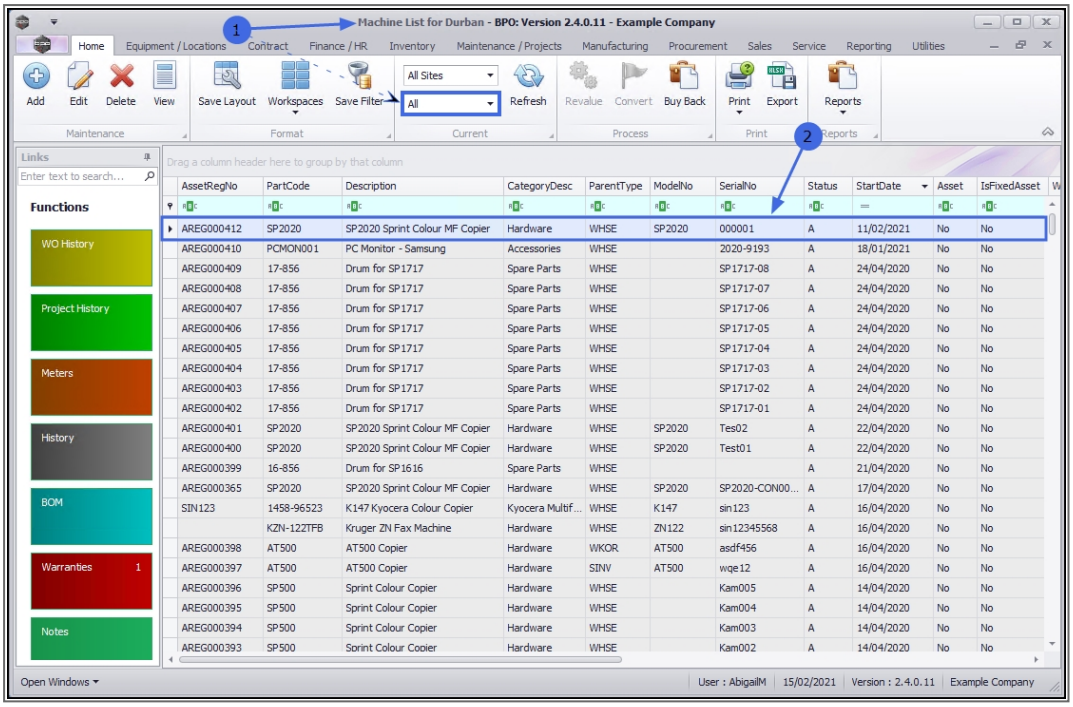

Related Topics

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

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