

EQUIPMENT

ASSETS - ADD - ASSET DETAILS

A **Customer Asset** should <u>only</u> 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 <u>added from the Customer Listing</u> 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 <u>not</u> need to be selected in this screen to continue this process.

Refer to <u>Site Selection</u> for more information.

3. Click on Add.



æ	es —	Utilitie	e Reporting	Servio	urement Sales		Manufact.	enance / Projects	Machine List for Durba	Contract Fin	nt / Locations	ome Equipme	
			arts		Print Expo	ert Buy Back	evalue Conve	Refresh Re	All Sites	t Workspaces		Delete Vie	
					÷		-		A	*			
			rts "	⊿ Rep	a Print	is.	2 Proces	*	4 Current	Format	4	tenance 🕑	Ma
							-					4	nks
WOA	IsFixedAsset	Asset	StartDate 🔻	Status	SerialNo	ModelNo	ParentType	CategoryDesc	Description	PartCode	AssetReaNo	earch P	ter text to
100	IS INCONSEC	ABSCC 1	-	n C		100001100	n C c	n Category Dese	n C:	n II coouc	P 10:		Function
-	No	No		-	AKM001002	- Contraction of the second se	WHSE	Hardware	-	SP500	-	·	runcuoi
No Yes	No	No	15/02/2021 18/01/2021	A	2020-9193		WHSE	Accessories	Sprint Colour Copier PC Monitor - Samsung	PCMON001	AREG000411 AREG000410	v	WO Hist
No	No	No	24/04/2020	A	2020-9195 SP1717-08		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000410 AREG000409	·	
No	No	No	24/04/2020	A	SP1717-08		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000409 AREG000408		
No	No	No	24/04/2020	A	SP1717-07		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000403	tory	Project
No	No	No	24/04/2020	A	SP1717-05		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000406	, (S) Y	Project History
No	No	No	24/04/2020	A	SP1717-04		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000405		
No	No	No	24/04/2020	A	SP1717-03		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000404		
No	No	No	24/04/2020	A	SP1717-02		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000403		Meters
No	No	No	24/04/2020	A	SP1717-01		WHSE	Spare Parts	Drum for SP1717	17-856	AREG000402		
No	No	No	22/04/2020	A	Tes02	SP2020	WHSE	Hardware	SP2020 Sprint Colour MF Copier	SP2020	AREG000401		
No	No	No	22/04/2020	A	Test01	SP2020	WHSE	Hardware	SP2020 Sprint Colour MF Copier	SP2020	AREG000400		History
No	No	No	21/04/2020	A			WHSE	Spare Parts	Drum for SP1616	16-856	AREG000399		
No	No	No	17/04/2020	A	SP2020-CON00	SP2020	WHSE	Hardware	SP2020 Sprint Colour MF Copier	SP2020	AREG000365		
No	No	No	16/04/2020	A	sin 123	K147	WHSE	Kyocera Multif	K147 Kyocera Colour Copier	1458-96523	SIN123		BOM
No	No	No	16/04/2020	A	sin12345568	ZN122	WHSE	Hardware	Kruger ZN Fax Machine	KZN-122TFB			
No	No	No	16/04/2020	A	asdf456	AT500	WKOR	Hardware	AT500 Copier	AT500	AREG000398		
No	No	No	16/04/2020	A	wge12	AT 500	SINV	Hardware	AT500 Copier	AT500	AREG000397	s 1	Warrant
No	No	No	14/04/2020	A	Kam005		WHSE	Hardware	Sprint Colour Copier	SP500	AREG000396		
No	No	No	14/04/2020	A	Kam004		WHSE	Hardware	Sprint Colour Copier	SP500	AREG000395		
No	No	No	14/04/2020	A	Kam003		WHSE	Hardware	Sprint Colour Copier	SP500	AREG000394		Notes
No	No	No	14/04/2020	A	Kam002		WHSE	Hardware	Sprint Colour Copier	SP 500	AREG000393		

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



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.

 	New Equipment - BPO: Version 2	.4.0.11 - Example Compan	у	
Home Equipment / Locations Contra	t Finance / HR Inventory Maintenance / Project	ts Manufacturing Pro	curement Sales Service Reporting Utiliti	es — 🗗 🗙
Save Back Process				\$
Links #		Finance		л
	Durban 👻 *	Cost	0 🛟	
Functions Serial N		Replacement Cost	0 ‡	
Asset Reg N		Is Financed		
WO History Custome		Finance Co.	-	
Addres	* م م	Finance Type	.	
		Payment Type	-	
Project History Technicia	· · · ·	Payment Day	1 ‡	
Start Dat	15/02/2021 -	Payment Amount	0 🗘	
Priorit		Payment Start	•	
Meters SLA Hour	•	Payment End	•	
Part No		Is Escalated		
	÷	Escalation Amount	0 🗘	
History Model No		Escalation Period	0 🗘	
Categor	· · · · · · · · · · · · · · · · · · ·	Travel Distance	0 \$	
BOM Parent Locatio		Travel Rate Refurbishment Date		
Loan Un		Depreciation Start		
In Service		Useful Life	0	
Warranties 1 Rotable		Is Fixed Asset		
		Operational Status		
Notes				
		Finance Other Data	User Defined	
Open Windows 🕶			User : AbigailM 15/02/2021 Version : 2.4.0.11	Example Company

- 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.



- 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 <u>Ser</u>-<u>vice Level Agreement</u> 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).



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

	New Equipment - BPO: Version 2.	4.0.11 - Example Company	_ – ×
Home Equipment / Locations Contract	Finance / HR Inventory Maintenance / Project	ts Manufacturing Procurement Sales Service Reporting Utilities	_ 8 ×
Save Back Save Layout Workspace			
Save Dack Save Layout Workspace			
Process " Format "			
Links 4		Finance	ф
P Branch	Durban 👻 *	Cost 0 🗘	
Functions Serial No	*	Replacement Cost 0 🗘	
Asset Reg No		Is Financed	
WO History Customer	* م	Finance Co.	
Address	* ^	Finance Type 🔹	
	· · · · · · · · · · · · · · · · · · ·	Payment Type 🔹	
Project History Technician	•	Payment Day 1 🗘	
Start Date	15/02/2021 -	Payment Amount 0 🗘	
Priority	1 🗘 *	Payment Start 🔹	
Meters SLA Hours	0 🗘	Payment End 👻	
Part No.	*	Is Escalated	
	÷	Escalation Amount 0 🛟	
History Model No.		Escalation Period 0 🗘	
Category		Travel Distance 0 🗘	
BOM Parent Location	*	Travel Rate 0 ‡ Refurbishment Date 15/02/2021 ▼	
Loan Unit	WO Default Item		
In Service		Depreciation Start 15/02/2021 Useful Life 0	
Warranties 1 Rotable		Is Fixed Asset	
Kotable		Operational Status	
Notes			
		Finance Other Data User Defined	
Open Windows -		User : AbigailM 15/02/2021 Version : 2.4.0.11	Example Company

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



\$ •		New Equipment	- BPO: Version 2.4	4.0.11 - Example Com	pany		_ • ×
Home Equipment	/Locations Contract	Finance / HR Inventory M	laintenance / Projec	ts Manufacturing	Procurement Sales	s Service Reporting	Utilities — 🗗 🗙
			×.				
Save Back Save Layout	Workspace		1				
Process 5 Forma	*		24				
Links 4	at a			nance			
Enter text to search	Branch	Durker	-	Cost		0 ‡	· · · · · · · · · · · · · · · · · · ·
	Serial No					0 🗘	
Functions	Asset Reg No		-	Replacement Cost Is Financed		0 .	
WO History			* ۵	Finance Co.		-	
			*	Finance Type			
		New Town Forest Hills		Payment Type			
Project History			-	Payment Day			
	Start Date			Payment Amount		0 💲	
	Priority	3 🜲 *		Payment Start		- •	
Meters	SLA Hours	8 ‡		Payment End			
	Part No.	SP 20 20	* 0	Is Escalated			
		SP2020 Sprint Colour MF Copier	4	Escalation Amount		0 🗘	
History	Model No.	SP2020		Escalation Period	0 🗘		
	Category	Hardware		Travel Distance		0 🗘	
	Location	Customer Assets	* م	Travel Rate		0 🗘	
BOM	Parent Location	Customer Asset Warehouse		Refurbishment Date	15/02/2021 🔹		
	Loan Unit	W0 Default Item		Depreciation Start	15/02/2021 -		
	In Service	WO Notification		O Useful Life	4		
Warranties 1	Rotable	Tasks		Is Fixed Asset			
				Operational Status			
		T					
Notes							
				Finance Other Data	User Defined		
Open Windows 🕶					User : AbigailM	15/02/2021 Version :	2.4.0.11 Example Company

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.



Assets - Add - Asset Details

٠	Home	Equ	ipment	/Locations Co	ntract Finan	ce / HR Inventory Maintena	nce / Projects	Manufacturing	9 Procuren	ient Sales S	ervice	Reporting U	tilities	_ 8	
e e e e e e e e e e e e e e e e e e e	Edit	X	View	Save Lavout	Workspaces	All Sites	Refresh Re	value Conver	t Buy Back	Print Export	Repo				
luu	Luit	Delete	VICI	Save Eayout	*	All	Kenean Ke	value conver	te bay back	* Export	Thepe				
	Mainten	ance		4	Format	ے در Current	4	Process	S .	Print	2 Repo	rts 🦼			
nks				rag a column heade							-				
iter tex	xt to sear	ch	2	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate		IsFixedAsse	e
Funct	tions		٩	REC	a 🛛 c	A D C	R I C	* E ¢	anc .	RDC F	RBC	-	= 0 c	a 🛛 c	
_				AREG000412	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	000001	A	11/02/2021	No	No	1
				AREG000410	PCMON001	PC Monitor - Samsung	Accessories	WHSE		2020-9193	A	18/01/2021	No	No	1
				AREG000409	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-08	A	24/04/2020	No	No	
				AREG000408	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-07	A	24/04/2020	No	No	
Proje	ect Histor			AREG000407	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-06	A	24/04/2020	No	No	
				AREG000406	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-05	A	24/04/2020	No	No	
				AREG000405	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-04	A	24/04/2020	No	No	
Mete	ers			AREG000404	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-03	A	24/04/2020	No	No	
				AREG000403	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-02	A	24/04/2020	No	No	
				AREG000402	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-01	А	24/04/2020	No	No	
Histo	onv			AREG000401	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	Tes02	A	22/04/2020	No	No	
Theorem	or y			AREG000400	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	Test01	A	22/04/2020	No	No	
				AREG000399	16-856	Drum for SP1616	Spare Parts	WHSE			Α	21/04/2020	No	No	
				AREG000365	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	SP2020-CON00	Α	17/04/2020	No	No	
BOM	1			SIN123	1458-96523	K147 Kyocera Colour Copier	Kyocera Multif	WHSE	K147	sin 123	Α	16/04/2020	No	No	
					KZN-122TFB	Kruger ZN Fax Machine	Hardware	WHSE	ZN122	sin 12345568	Α	16/04/2020	No	No	
				AREG000398	AT500	AT500 Copier	Hardware	WKOR	AT500	asdf456	Α	16/04/2020	No	No	
Wan	ranties			AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wqe12	Α	16/04/2020	No	No	
				AREG000396	SP500	Sprint Colour Copier	Hardware	WHSE		Kam005	Α	14/04/2020	No	No	
				AREG000395	SP500	Sprint Colour Copier	Hardware	WHSE		Kam004	Α	14/04/2020	No	No	
Note				AREG000394	SP500	Sprint Colour Copier	Hardware	WHSE		Kam003	Α	14/04/2020	No	No	
				AREG000393	SP500	Sprint Colour Copier	Hardware	WHSE		Kam002	A	14/04/2020	No	No	l

Related Topics

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

MNU.007.034