EQUIPMENT

ASSETS - VIEW - SERIALISED STOCK

The **View** button in the Asset Listing screen (**Machine List for []** screen) allows you to view more details about a selected asset.

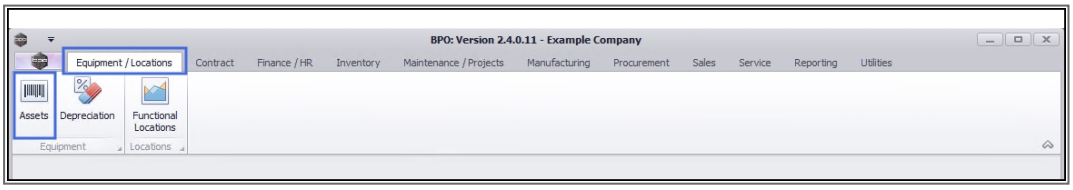
This screen lists relevant asset information depending on whether the asset selected is:

i. a Client Machine (Customer Asset)
ii. an Internal Asset or
iii. a Serialised Stock Item

In this process, we will examine the details for a **serialised stock** (or company-owned) item. This is an asset that is owned by the company, and is in store ready to be:

1. sold to a customer *or*
2. converted to an internal asset and rented out.

Ribbon Access: *Equipment and Locations > Assets*



1. The ***Machine List for []*** screen will display.

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THE SITE AND TYPE FILTERS

2. This screen will open with the default ***Site*** setting configured on the user and the ***Type*** filter set to ***All*** (machines).
    - If this screen is open in a different site from the one required, you can click on the ***drop-down arrow*** in the Site field and select a particular site or '***All Sites***' from the list.
    - In this example, the ***Durban*** site is selected.

> **Note**: Refer to Site Selection for more information about Site settings.

3. To ensure that you will the correct type of asset, ensure that the ***Status*** filter is set to ***Serialised Stock***.

SELECT THE ASSET

4. Select the ***row*** of the serialised stock item where you wish to ***view*** the details.

VIEW ASSET

5. Click on ***View***.

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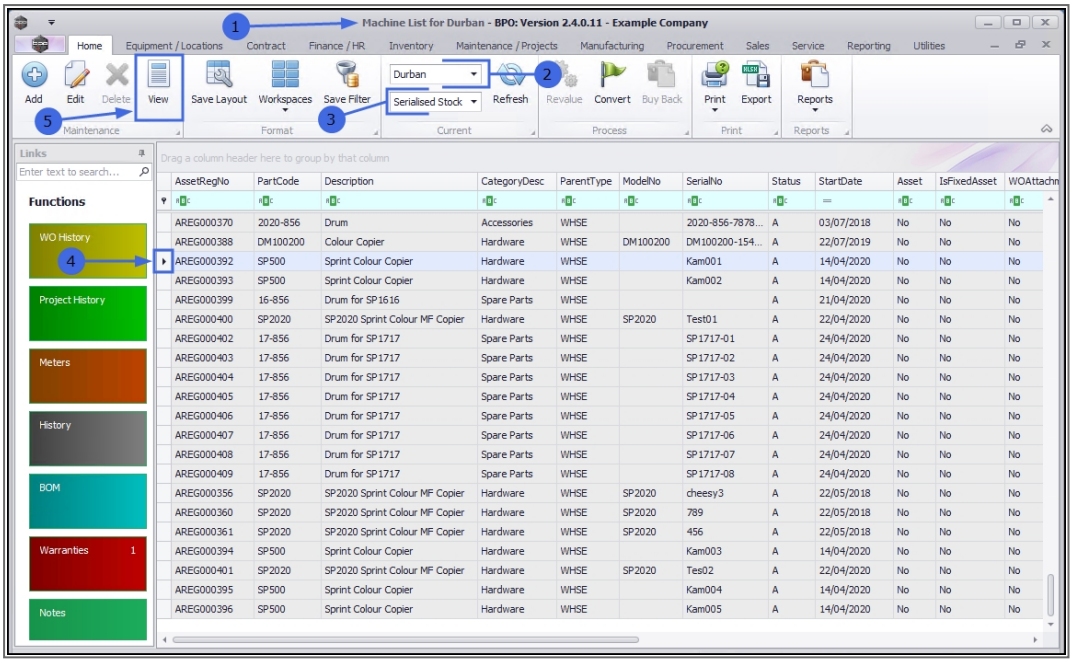

1. The ***Equipment Maintenance for Serial No: []*** screen will open.
2. You will note that there is only a ***Back*** button. This is because this is a view only screen, no changes can be made in this screen.

VIEW ASSET DETAILS

3. The left side of this screen lists the asset details.
4. The first **3** fields are used across all asset types:
    - **Branch**: This is the branch or Site that 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.)
5. The next **2** fields: **Customer** and **Address**, are used only when dealing with a Customer Asset. In this topic we are looking at a ***serialised stock item*** so these fields will remain blank.

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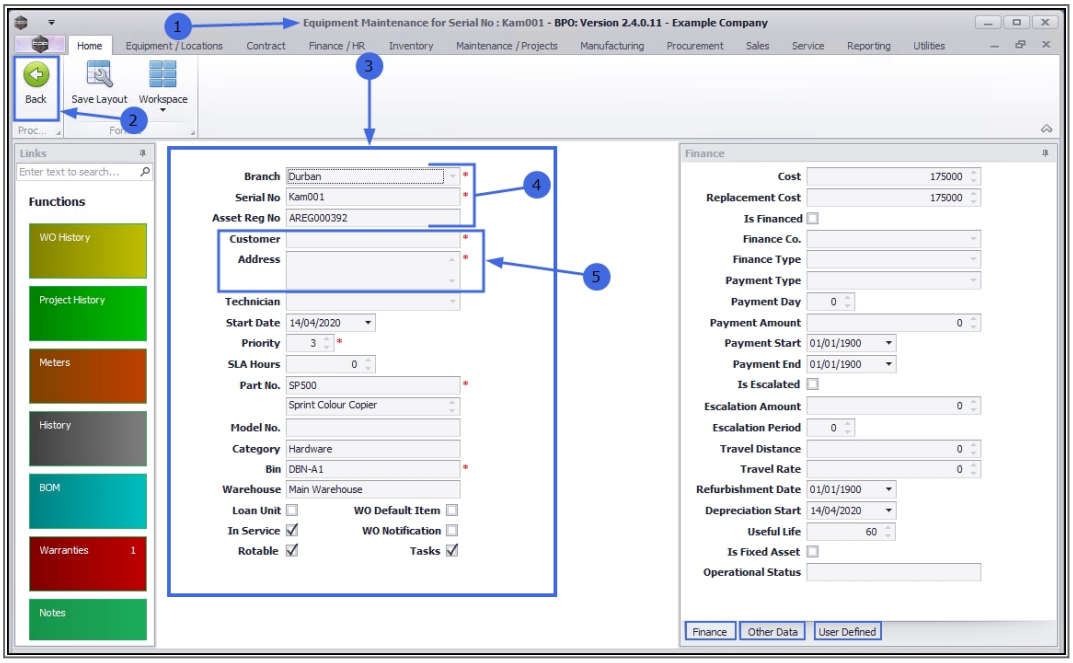

1. The following fields are used across all asset types:

    - **Technician**: Click on the drop-down arrow and select a technician to link to this item.
    - **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**: Here you can select the priority (1 = Most Important, 5 = Least Important).
    - **SLA Hours**: Here you can select the Service Level Agreement Monitor (in hours).
    - **Part No. and Description**: This will display the part number and description of the asset.
    - **Model No.**: This will display the model no. of the asset, if applicable
    - **Category**: This will display the category of the asset e.g. Hardware or Accessories.

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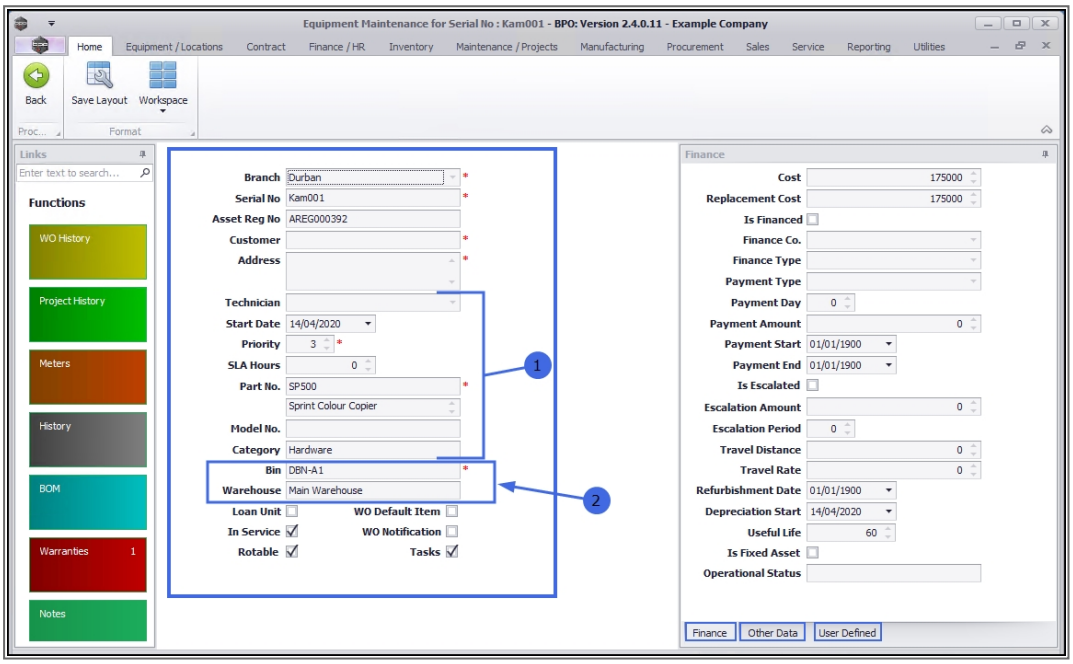
2. The next **2** field names will differ depending on the asset ***type*** *and* the ***location*** of the asset. As this is a serialised stock item these fields will be:

i. **Bin** - the bin within the warehouse, where this item is currently located.
ii. **Warehouse** - the warehouse where this item is currently located.

In this example, the item is in the ***DBN-A1*** bin within the ***Main Warehouse***.



ASSET DETAIL CHECK BOXES

- **Loan Unit**: This check box is to be ticked if this is a loan machine to be issued and sent out to a client whilst their machine is being repaired - that would apply to an internal asset therefore the check box would be unchecked for a serialised stock item.
- **In Service**: This check box is to be ticked if the item falls within a service plan and needs to be periodically serviced. A serialised stock item can be under a service plan, this check box can be ticked.

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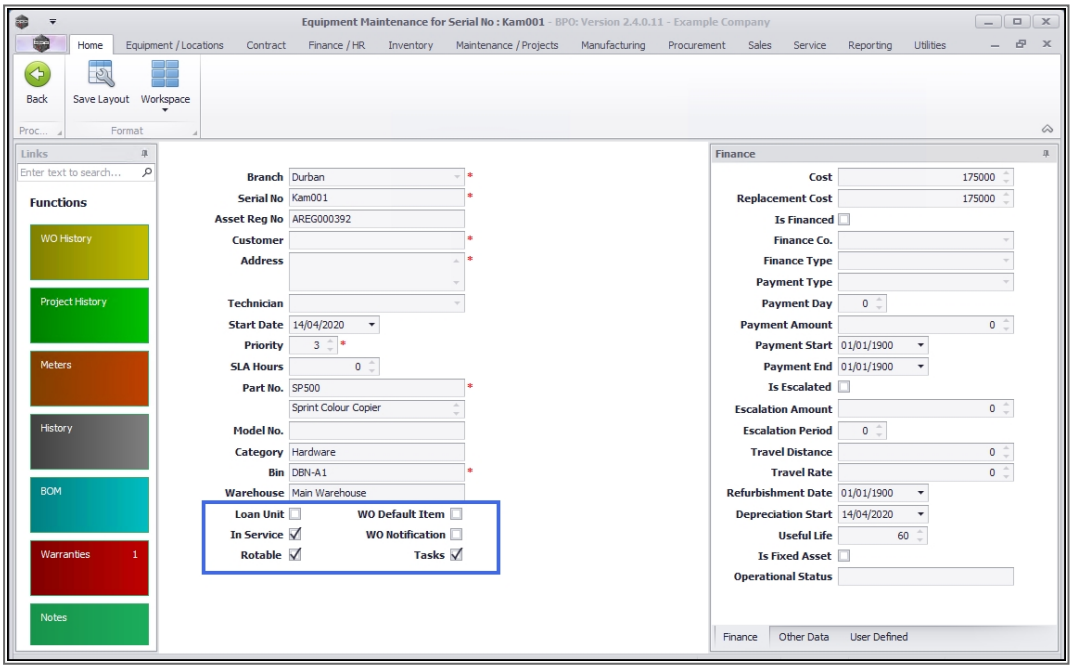
- **Rotable**: This is a servicing method in which an already-repaired equipment item is exchanged for a failed equipment item, which in turn is repaired and kept for another exchange. A serialised stock item can be repaired and waiting to be sent out as an internal asset. (*This functionality is not 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). This does not apply to a serialised stock item the check box can be unchecked.
- **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 Introduction to Tasks for more information.



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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 for example, the item may have 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 client owned asset).
- **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.

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- **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 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. a 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

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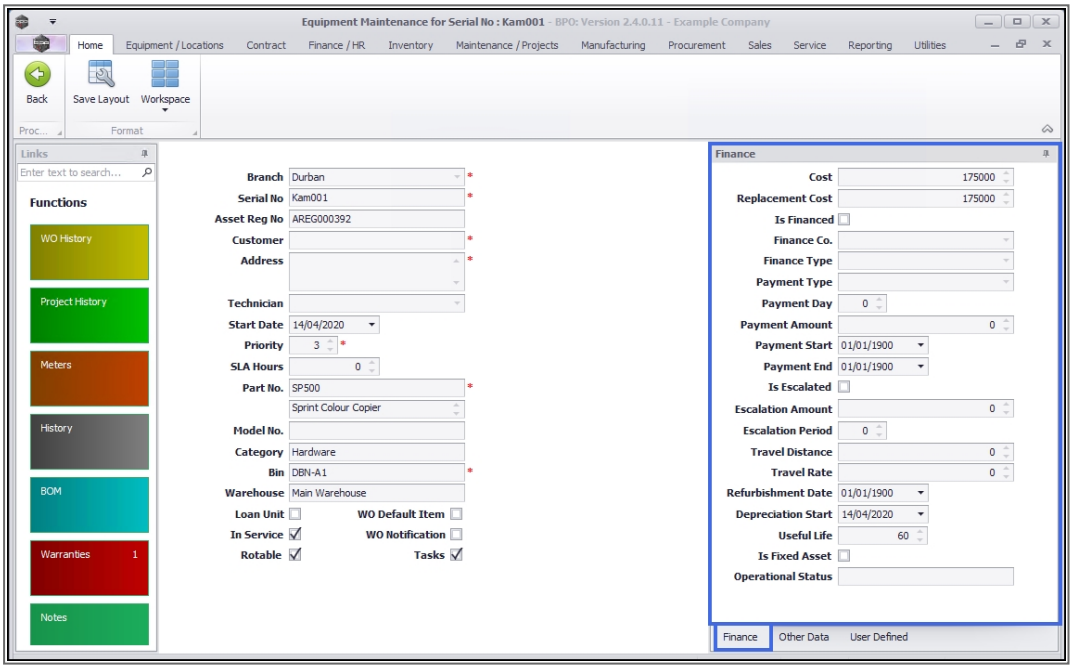
it is considered a write off. This field is affected by depreciation, if it is enabled.

- **Is Fixed Asset**: This check box will be unchecked as it only applies to an ***internal*** asset.
- **Operational Status**: Here you can 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.



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 a serialised stock item.
    - **Note 1**: These field labels can be ***re-named*** to suit your company requirements).

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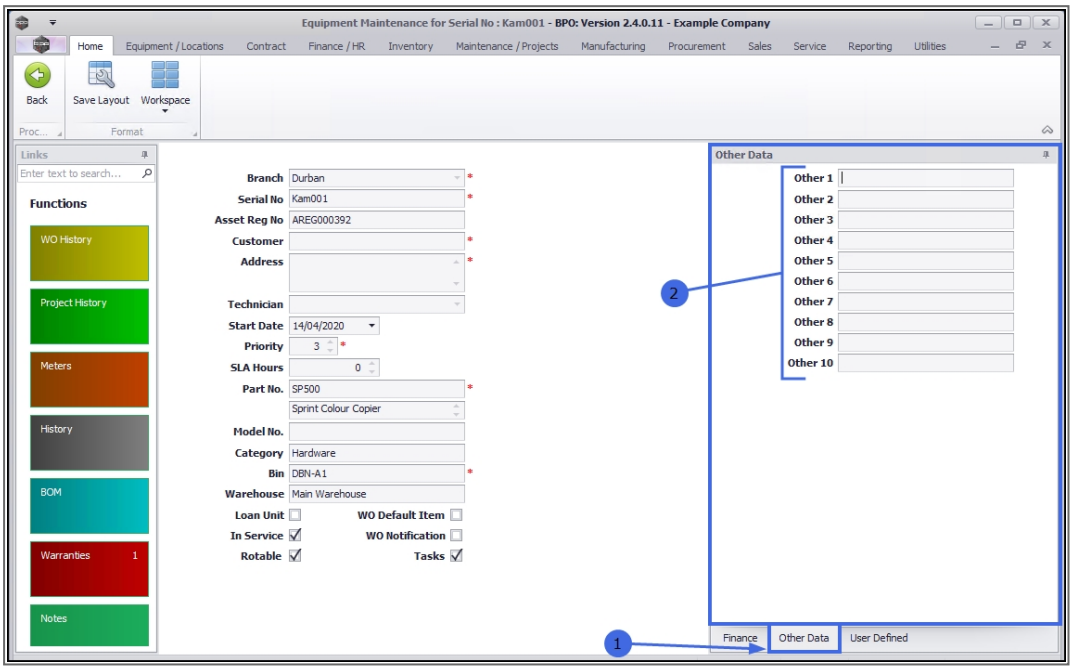
- **Note 2**: As this is the view only screen you cannot add or edit the fields from here.

For more information refer to Other Data.



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.
3. However, the ***Variable Values*** selected for each User Defined field will be unique 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.

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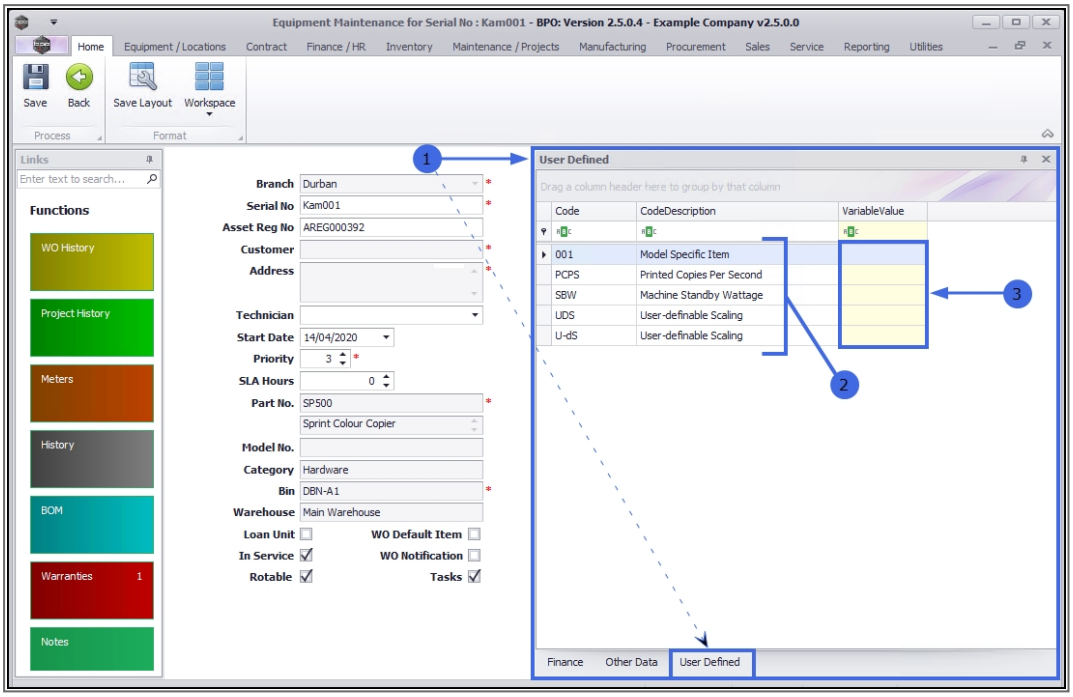
For more information refer to Add or Edit User Defined.



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