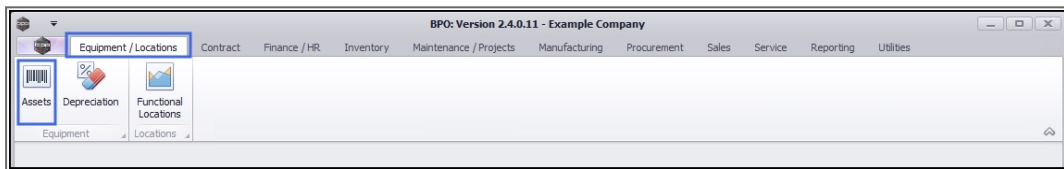


EQUIPMENT

ASSETS - ADD - FINANCE DETAILS

Once the customer asset details have been added, you can follow the process below to add the customer asset *finance* details.

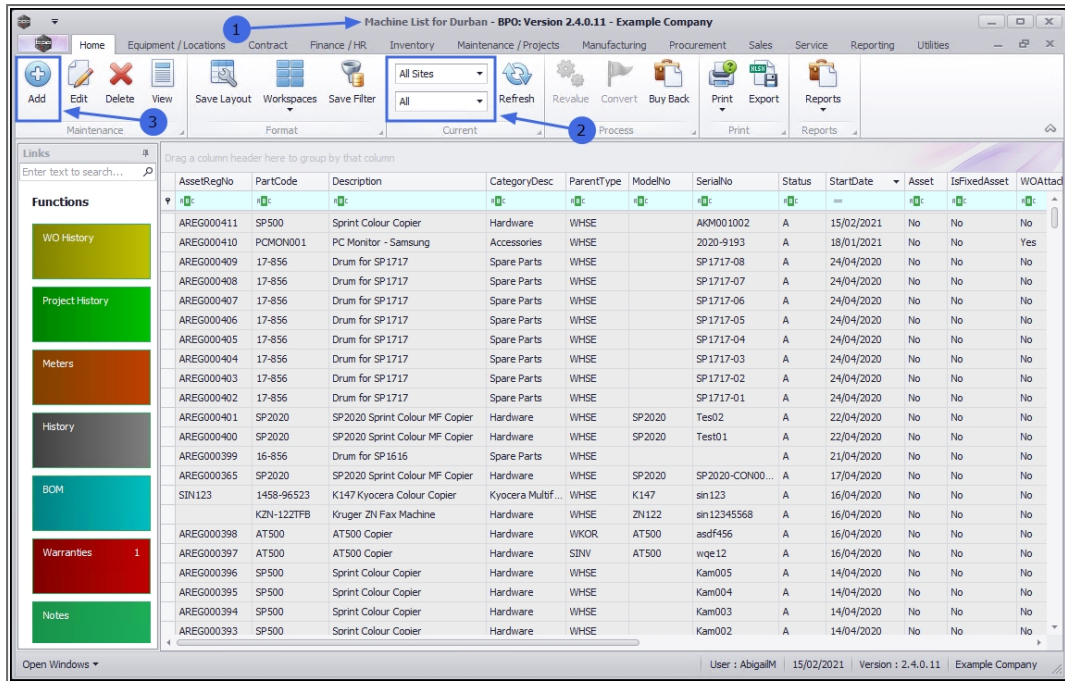
Ribbon Access: *Equipment and Locations* > *Assets*



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

SELECT THE SITE AND STATUS

2. The *Site* and *Status* do not need to be selected in this screen to continue this process.
3. Click on *Add*.



Follow the process to [add the customer asset details](#).

1. Once the required details have been added, move across to the **Finance** frame.

ADD FINANCE FRAME DETAILS

2. Complete the finance details, as applicable.
 - **Cost:** Either type in or use the arrow indicators to enter the cost of the customer machine.
 - **Replacement Cost:** Either type in or use the arrow indicators to enter the replacement cost of the customer machine.
 - **Is Financed:** Click on this check box if this customer machine is financed.
 - **Finance Co:** Click on the drop-down arrow and select the finance company supplying finance for this machine, if applicable.

- **Finance Type:** 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.
- **Payment Day:** Either type in or use the arrow indicators to enter the day of the month 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.

The screenshot shows the 'Finance' tab in the software interface. The 'Is Escalated' checkbox is highlighted with a blue box and a blue arrow. The 'Finance Type' dropdown menu is also highlighted with a blue box and a blue arrow. The 'Payment Type' dropdown menu is also highlighted with a blue box and a blue arrow. The 'Payment Day' dropdown menu is also highlighted with a blue box and a blue arrow. The 'Payment Amount' dropdown menu is also highlighted with a blue box and a blue arrow. The 'Payment Start' dropdown menu is also highlighted with a blue box and a blue arrow. The 'Payment End' dropdown menu is also highlighted with a blue box and a blue arrow. The 'Is Escalated' checkbox is also highlighted with a blue box and a blue arrow.

- **Is Escalated:** Click on this check box if this payment amount is to be escalated after a period.

- **Escalation Amount:** Either type in or use the arrow indicators to enter the escalation amount.
- **Escalation Period:** Either type in or use the arrow indicators to enter the time 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:** Set the date at which this asset should be due for refurbishment, if applicable.
- **Depreciation Start:** Set the date from which this item will start depreciating.
- **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 an asset is calculated before it gets written off, e.g. 5 years. Type in the number of months that the asset will be in condition before it is considered a write off. This field is affected by depreciation if it is enabled. *As this is a customer asset, this field does not apply.*
- **Is Fixed Asset:** As this is a customer asset, this check box should remain un-ticked.
- **Operational Status:** Here you can add information or comments about anything related to this customer asset 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 asset for operation. Type in whether the asset is operational or not and why, if required.

SAVE CUSTOMER ASSET

1. When you have finished updating the customer asset details and **finance** details, you can

Either follow the processes to:

2. Add the asset Other Data and
3. Add the asset User Defined fields, if required,

Or

4. Click on **Save**.

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.

AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset
AREG000412	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	000001	A	11/02/2021	No	No
AREG000410	PCMON001	PC Monitor - Samsung	Accessories	WHSE		2020-9193	A	18/01/2021	No	No
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
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
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	A	24/04/2020	No	No
AREG000401	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	Tes02	A	22/04/2020	No	No
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			A	21/04/2020	No	No
AREG000365	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	SP2020-CON00...	A	17/04/2020	No	No
SIN123	1458-96523	K147 Kyocera Colour Copier	Kyocera Multif...	WHSE	K147	sin123	A	16/04/2020	No	No
	KZN-1227FB	Kruger ZN Fax Machine	Hardware	WHSE	ZN122	sin12345568	A	16/04/2020	No	No
AREG000398	AT500	AT500 Copier	Hardware	WKOR	AT500	asdf456	A	16/04/2020	No	No
AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wqe12	A	16/04/2020	No	No
AREG000396	SP500	Sprint Colour Copier	Hardware	WHSE		Kam005	A	14/04/2020	No	No
AREG000395	SP500	Sprint Colour Copier	Hardware	WHSE		Kam004	A	14/04/2020	No	No
AREG000394	SP500	Sprint Colour Copier	Hardware	WHSE		Kam003	A	14/04/2020	No	No
AREG000393	SP500	Sprint Colour Copier	Hardware	WHSE		Kam002	A	14/04/2020	No	No

Related Topics

- [Assets - Add - Asset Details](#)
- [Assets - Add - Finance Details](#)
- [Assets - Add - Other Data](#)
- [Assets - Add - User Defined](#)

MNU.007.043

