

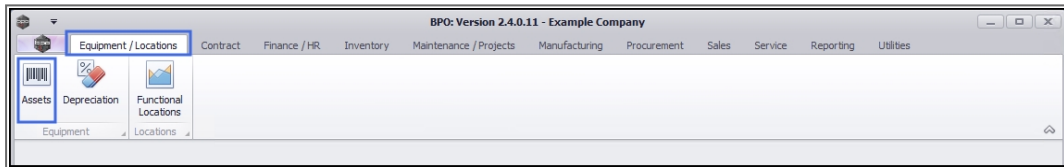
EQUIPMENT

ASSETS - EDIT - FINANCE DETAILS

The *finance details* relating to a selected asset may need to be updated during the lifespan of the asset. If your company has security rights configured then you may not be able to edit some, or even all, of these finance details.

Follow the process below to **edit** the **Finance** panel information.

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



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

THE SITE AND TYPE FILTERS

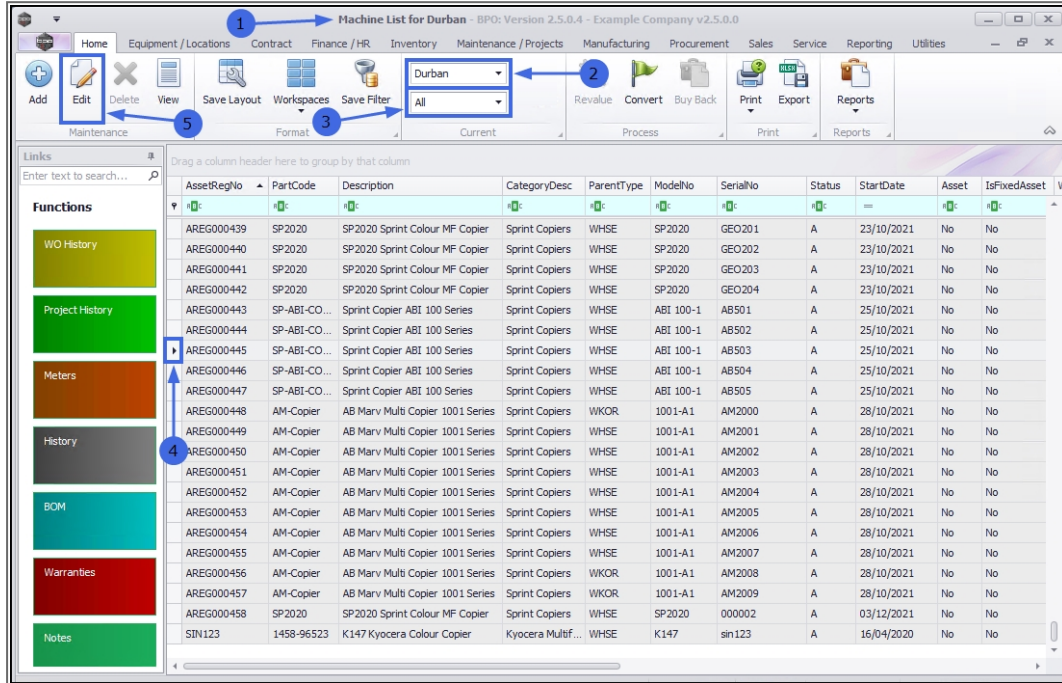
2. The screen will open with the default **Site** setting configured on the user.

Note: Refer to [Site Selection](#) for more information.

3. This screen will open by default in the **All** Type. You do not need to change this *Type* in order to add asset **other data**. If this screen is already open in another *Type* e.g. *Internal Assets*, then click on the **drop-down arrow** and select from the list, the *Type* that contains the asset you wish to work with.

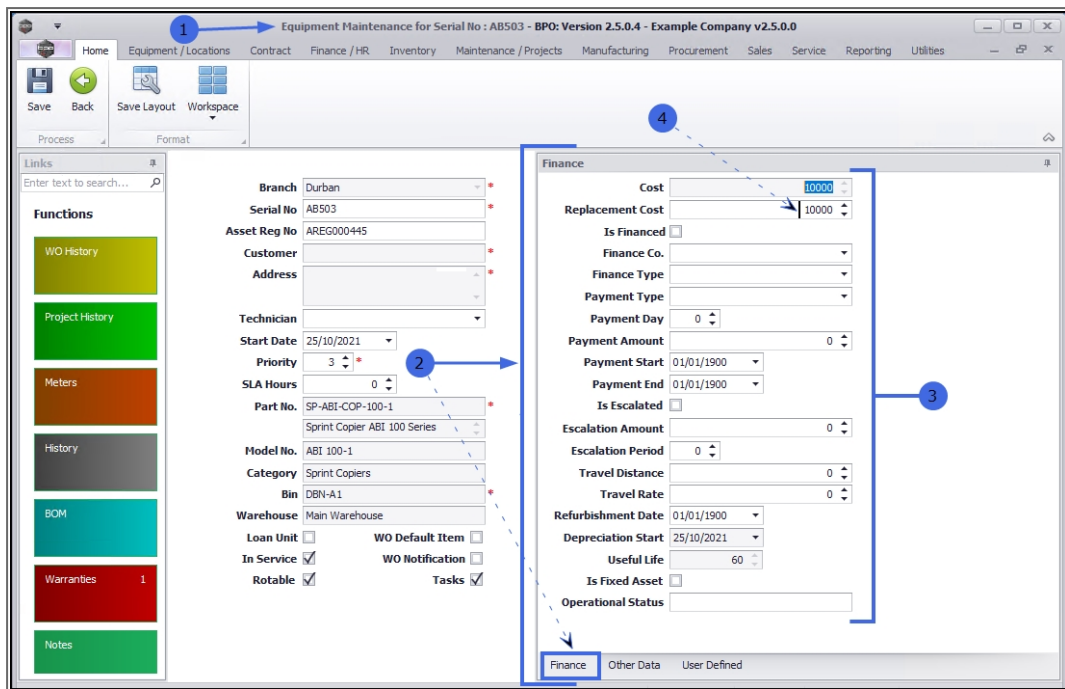
SELECT ASSET TO EDIT

4. Select the **row** of the **asset** where you wish to **edit** the finance details.
5. Click on **Edit**.



1. The **Equipment Maintenance for Serial no: []** screen will open.
2. If the **Finance** frame is not already open, click on the **Finance** tab.
3. Edit the required fields:
 - **Cost:** Either type in or use the directional arrows to update the purchase price of the item if applicable.
 - **Replacement cost:** Either type in or use the directional arrows to update the replacement cost of the item if applicable.
 - **Is Financed:** Tick this check box if the item is financed.
 - **Finance Type:** Click on the drop-down arrow and select the finance type, if applicable.

- **Payment Type:** Click on the drop-down arrow and update the payment type if applicable.
 - **Payment Day:** Either type in or use the directional arrows to update the payment day, if applicable.
 - **Payment Amount:** Either type in or use the directional arrows to update the payment amount if applicable.
 - **Payment Start:** Click on the drop-down arrow and update the payment start date if applicable.
 - **Payment End:** Update payment end date if applicable.
 - **Is Escalated:** Update this check box if applicable.
 - **Escalation Amount:** Update the escalation amount, if applicable.
 - **Escalation Period:** Update the escalation period, if applicable.
 - **Travel Distance:** Update the travel distance, if applicable. If a km value is input here, each time a call is logged against the serial number, the system will want to invoice within the closest [travel radii](#) (travel zone).
 - **Travel Rate:** Update the travel rate, if applicable.
 - **Refurbishment Date:** Update the refurbishment date, if applicable.
 - **Depreciation Start:** Update depreciation start date, if applicable.
 - **Useful Life:** This field cannot be edited from here.
 - **Is Fixed Asset:** This field cannot be edited from here.
 - **Operational Status:** Update the operational status, if applicable.
4. Place your *cursor* in the finance field where you wish to make changes.
- In this example, the **Replacement Cost** is to be updated.



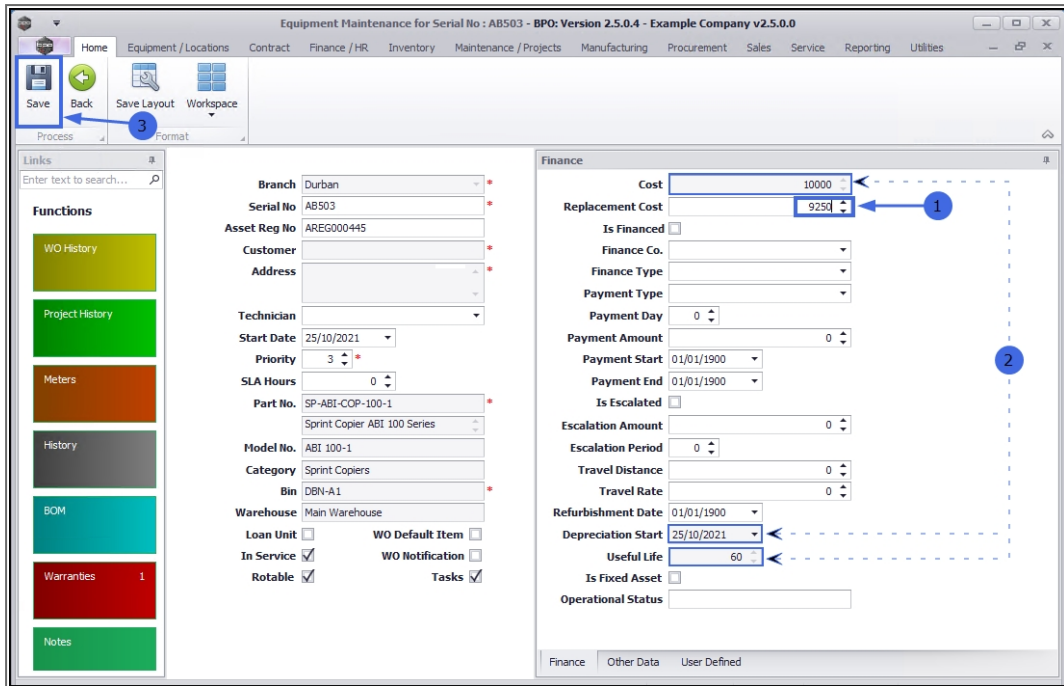
You can edit the fields in the following ways:

- **highlight** and **type over** the original text with new information
- **backspace over** and **type in** the new information
- **add** new information to the text currently in the field.

1. The **Replacement Cost** has been updated to **9250**.
2. Note that the following fields are 'greyed out' and *cannot* be edited:
 - **Cost**
 - **Depreciation Start**
 - **Useful Life**

SAVE EDITED FINANCE DETAILS

3. When you finished editing the Finance details, as required, click on **Save**.



The changes will be **saved** and you will return to the **Machine List for []** screen.

Related Topics

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

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