

# EQUIPMENT

## ASSETS - CONVERT ASSET TO STOCK

**Stock v Asset:** A stock item is a serialised item in store ready to be sold. It can be [converted into an Asset](#).

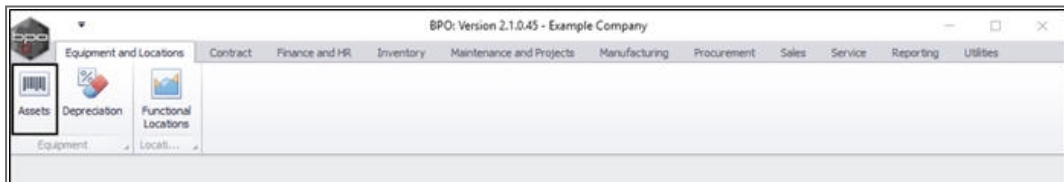
[Convert Stock to Asset](#) will set the stock item to an asset. This means that the item will be creating a revenue, for example, a machine for rental purposes.

**Convert Asset to Stock** will set the serialised item to a stock item. This means that the item will be sold without a rental or service agreement, for example, a machine for sales purposes.

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

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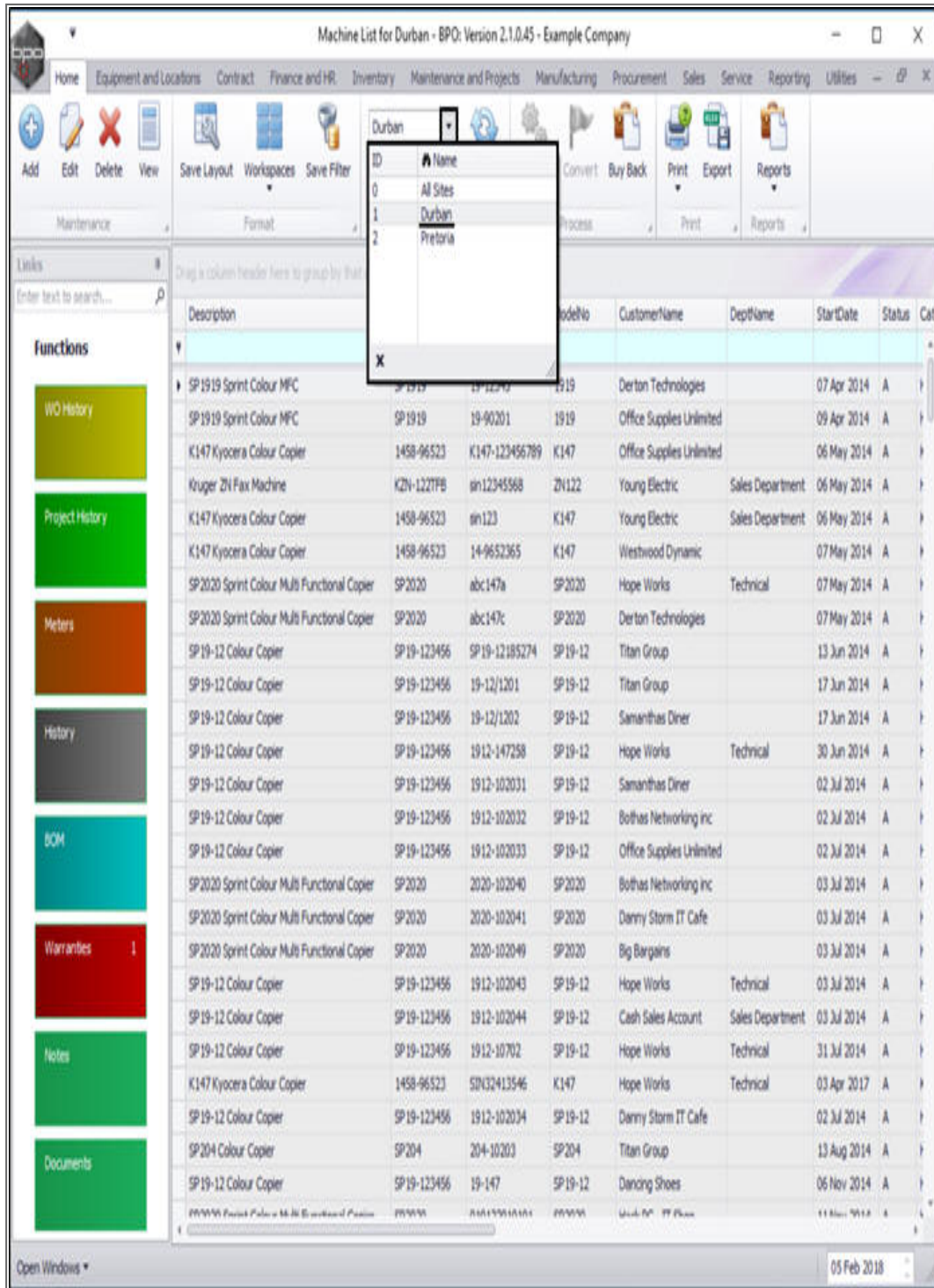


The *Machine Listing for []* screen will be displayed.

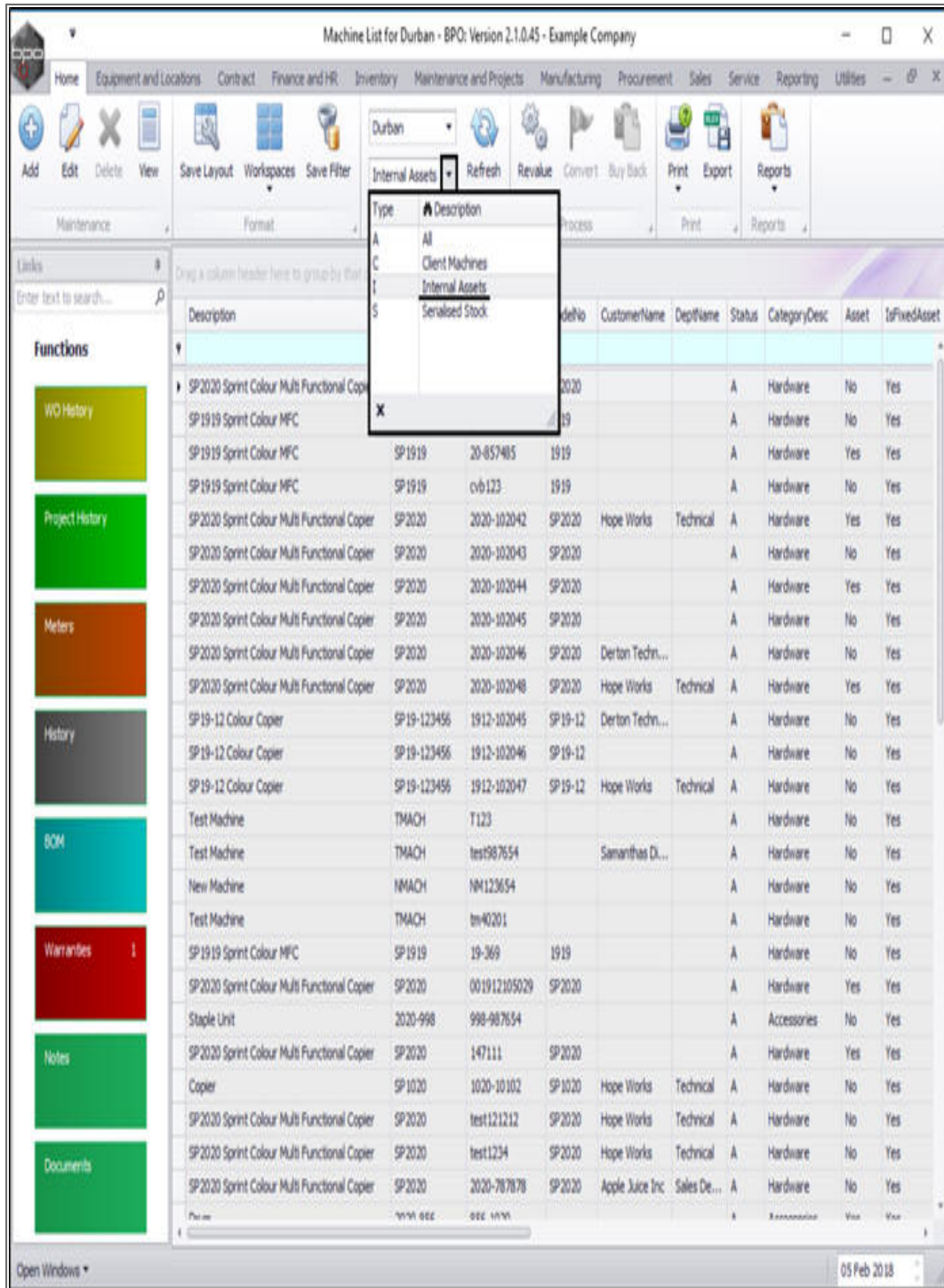
## SELECT THE SITE AND STATUS

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- Select the **site**.
  - In this image **Durban** has been selected.



- Select the **status**.
  - This must be set to **Internal Assets**.



## SELECT ASSET TO BE CONVERTED

Either

- Select the **row** of the **serialised item** that you wish to convert from an **internal asset** to **stock**.
- Click on **Convert**.

Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Internal Assets Refresh Revalue **Convert** Buy Back Print Export Reports

Links: Enter text to search... Drag a column header here to group by that column

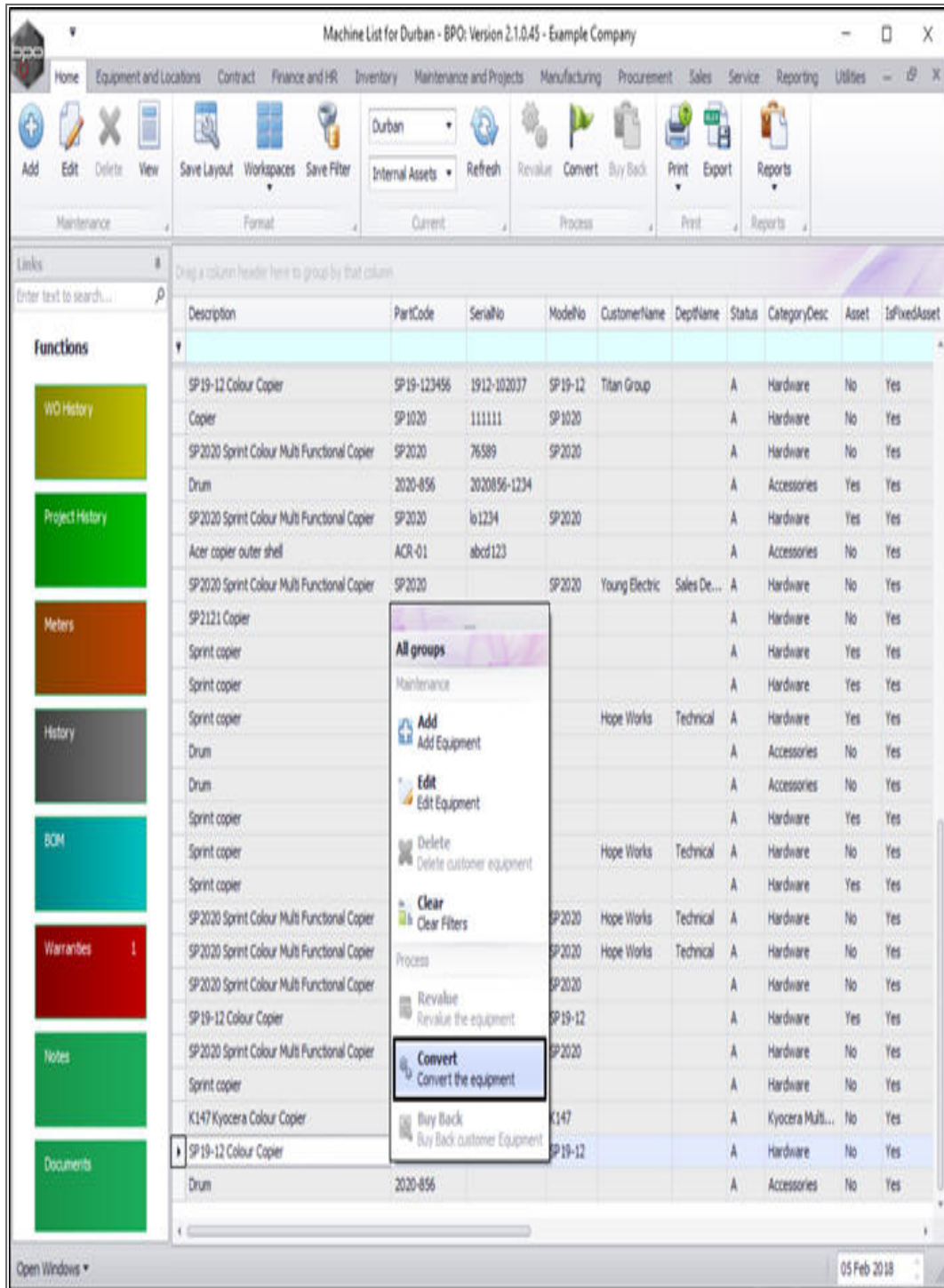
Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP19-12 Colour Copier	SP19-123456	1912-102037	SP19-12	Titan Group		A	Hardware	No	Yes
Copier	SP1020	111111	SP1020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	76589	SP2020			A	Hardware	No	Yes
Drum	2020-856	2020856-1234				A	Accessories	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	101234	SP2020			A	Hardware	Yes	Yes
Acer copier outer shell	ACR-01	abcd123				A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020		SP2020	Young Electric	Sales De...	A	Hardware	No	Yes
SP2121 Copier	SP2121					A	Hardware	No	Yes
Sprint copier	SP1818	1818-9999				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-5555				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-4444		Hope Works	Technical	A	Hardware	Yes	Yes
Drum	2020-856	2020-4327				A	Accessories	No	Yes
Drum	2020-856	2020-4329				A	Accessories	No	Yes
Sprint copier	SP1818	1818-8594				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-0890		Hope Works	Technical	A	Hardware	No	Yes
Sprint copier	SP1818	2020-9867LU				A	Hardware	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	987	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	321	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	789	SP2020			A	Hardware	No	Yes
SP19-12 Colour Copier	SP19-123456	9990	SP19-12			A	Hardware	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	333	SP2020			A	Hardware	No	Yes
Sprint copier	SP1818	18-30200				A	Hardware	No	Yes
K147 Kyocera Colour Copier	1458-96523	50N13512345	K147			A	Kyocera Multi...	No	Yes
SP19-12 Colour Copier	SP19-123456	7770	SP19-12			A	Hardware	No	Yes
Drum	2020-856					A	Accessories	No	Yes

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Or

- **Right click** in the **row** of the item that you wish to **convert** from an internal asset to stock.
- A **Maintenance** menu will pop up.
- Click on the **Convert - Convert the equipment** option.





- An **Equipment Conversion** message box will appear with the following prompt:

- Are you sure you want to convert serial number [ ]?
- Click on **Yes**.

Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

Navigation: Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Tools: Add | Edit | Delete | View | Save Layout | Workspaces | Save Filter | Durban | Internal Assets | Refresh | Revalue | Convert | Buy Back | Print | Export | Reports

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP19-12 Colour Copier	SP19-123456	1912-102037	SP19-12	Titan Group		A	Hardware	No	Yes
Copier	SP1020	111111	SP1020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	76589	SP2020			A	Hardware	No	Yes
Drum	2020-856	2020856-1234				A	Accessories	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	101234	SP2020			A	Hardware	Yes	Yes
Acer copier outer shell	ACR-01	abcd123				A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020		SP2020	Young Electric	Sales De...	A	Hardware	No	Yes
SP2121 Copier	SP2121					A	Hardware	No	Yes
Sprint copier	SP1818	1818-9999				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-5555				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-4444		Hope Works	Technical	A	Hardware	Yes	Yes
Drum	2020-856	2020-4327				A	Accessories	No	Yes
Drum	2020-856	2020-4329				A	Accessories	No	Yes
Sprint copier	SP1818	1818-8594				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-0890		Hope Works	Technical	A	Hardware	No	Yes
Sprint copier	SP1818	2020-9867LU				A	Hardware	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier						A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier						A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier						A	Hardware	No	Yes
SP19-12 Colour Copier						A	Hardware	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier						A	Hardware	No	Yes
Sprint copier						A	Hardware	No	Yes
K147 Kyocera Colour Copier						A	Kyocera Mu/...	No	Yes
SP19-12 Colour Copier	SP19-123456	7770	SP19-12			A	Hardware	No	Yes
Drum	2020-856					A	Accessories	No	Yes

Equipment Conversion dialog: Are you sure you want to convert serial number 7770? [Yes] [No]

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## ASSET TRANSACTION DETAILS

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- A *Transfer Information for serial no. []* screen will pop up.
  - **Transaction Date:** This will 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.
  - **Transfer Notes:** Type in a reason for this item transfer.



Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Durban Internal Assets Refresh Revalue Convert Buy Back Print Export Reports

Maintenance Format Current Process Print Reports

Links

Enter text to search...

Functions

- WO History
- Project History
- Meters
- History
- BOM
- Warranties
- Notes
- Documents

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP19-12 Colour Copier	SP19-123456	1912-102037	SP19-12	Titan Group		A	Hardware	No	Yes
Copier	SP1020	111111	SP1020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	76589	SP2020			A	Hardware	No	Yes
Drum	2020-856	2020856-1234				A	Accessories	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	101234	SP2020			A	Hardware	Yes	Yes
Acer copier outer shell	ACR-01	abc0123				A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020		SP2020	Young Electric	Sales De...	A	Hardware	No	Yes
SP2121 Copier								No	Yes
Sprint copier								Yes	Yes
Sprint copier								Yes	Yes
Sprint copier								Yes	Yes
Drum								No	Yes
Drum								No	Yes
Sprint copier								Yes	Yes
Sprint copier								No	Yes
Sprint copier								Yes	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
SP19-12 Colour Copier								Yes	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
Sprint copier								No	Yes
K147 Kyocera Colour Copier								No	Yes
SP19-12 Colour Copier	SP19-123456	7770	SP19-12			A	Hardware	No	Yes
Drum	2020-856					A	Accessories	No	Yes

Transfer information for serial no. 7770.

Home

Ok Cancel

Transaction Date: 06 Feb 2018

Transfer notes

Open Windows

05 Feb 2018

## SAVE ASSET CONVERSION

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- When you have finished adding the transfer date and note information, click on **Save**.

Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Durban Internal Assets Refresh Revalue Convert Buy Back Print Export Reports

Links Enter text to search...

Functions: WO History, Project History, Meters, History, DOM, Warranties, Notes, Documents

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP19-12 Colour Copier	SP19-123456	1912-102037	SP19-12	Titan Group		A	Hardware	No	Yes
Copier	SP1020	111111	SP1020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	76589	SP2020			A	Hardware	No	Yes
Drum	2020-856	2020856-1234				A	Accessories	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	101234	SP2020			A	Hardware	Yes	Yes
Acer copier outer shell	ACR-01	abc0123				A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020		SP2020	Young Electric	Sales De...	A	Hardware	No	Yes
SP2121 Copier								No	Yes
Sprint copier								Yes	Yes
Sprint copier								Yes	Yes
Sprint copier								Yes	Yes
Drum								No	Yes
Drum								No	Yes
Sprint copier								Yes	Yes
Sprint copier								No	Yes
Sprint copier								Yes	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
SP19-12 Colour Copier								Yes	Yes
SP2020 Sprint Colour Multi Functional Copier								No	Yes
Sprint copier								No	Yes
K147 Kyocera Colour Copier								No	Yes
SP19-12 Colour Copier	SP19-123456	7770	SP19-12			A	Hardware	No	Yes
Drum	2020-856					A	Accessories	No	Yes

Transfer information for serial no. 7770.

Home

Ok Cancel

Transaction Date: 06 Feb 2018

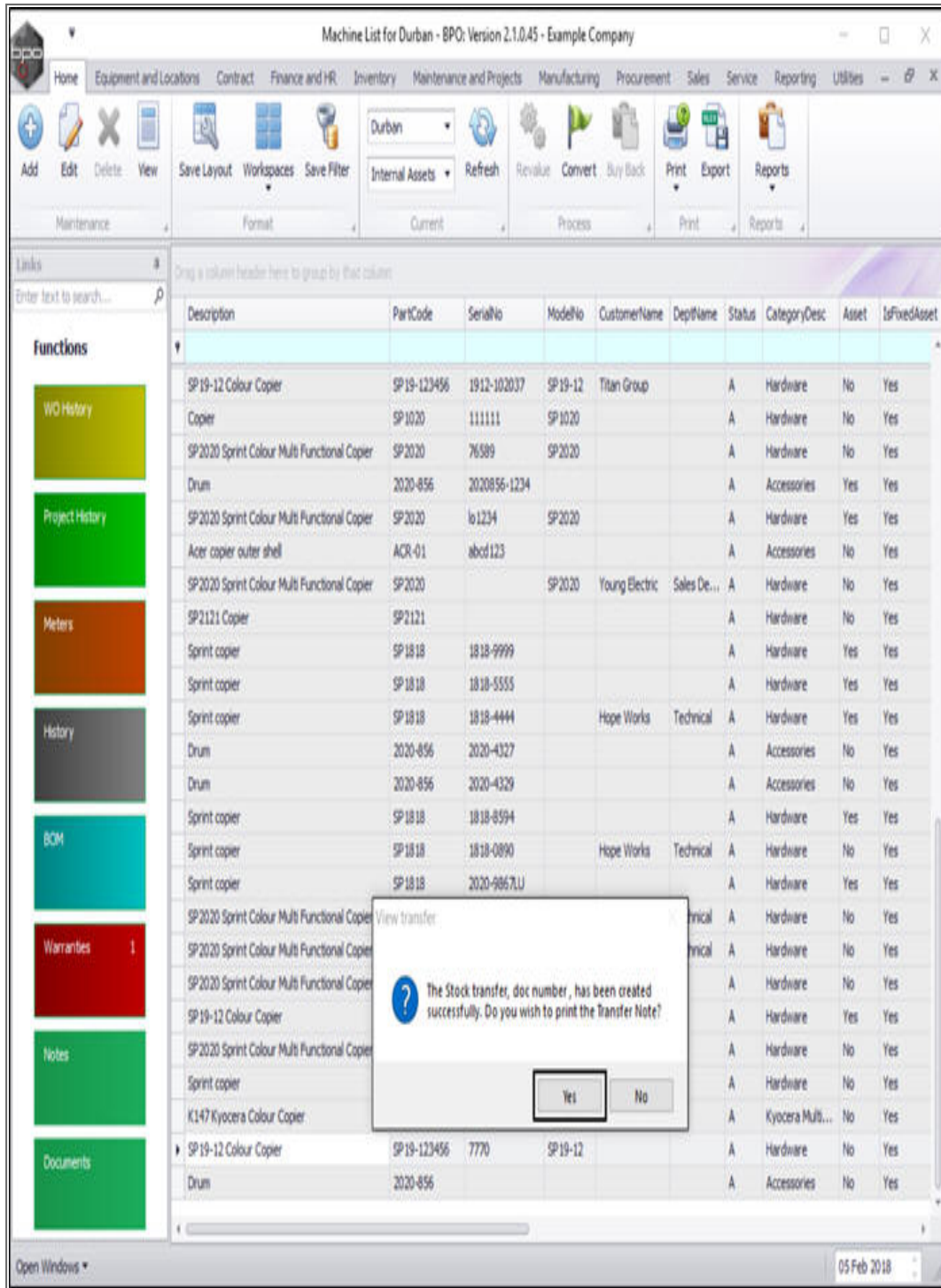
Transfer notes: Second hand sale

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## PRINT CONVERSION TRANSFER NOTE

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- A **View Transfer** message box will appear with the following prompt:
  - *The Stock transfer, doc number, has been created successfully. Do you wish to print the Transfer Note?*
    - Click on **Yes** to view the report.
    - Or,**
    - Click on **No** to miss out the next step n this manual.
- In this example, **Yes** has been selected.



- The **Part Transfer Note Report Preview** screen will be displayed.
- From here you can **Edit, Print, Email** or **Export** the document.



- **Close** the preview screen when you are finished.



- You will return to the **Machine List for []** screen where the selected internal asset has now been **removed** from this screen.

Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | View | Save Layout | Workspaces | Save Filter | Durban | Internal Assets | Refresh | Revalue | Convert | Buy Back | Print | Export | Reports

Links: Enter text to search...

Functions: WO History, Project History, Meters, History, DOM, Warranties, Notes, Documents

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103059	SP2020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103060	SP2020	Panda Copiers		A	Hardware	No	Yes
SP19-12 Colour Copier	SP19-123456	1912-102037	SP19-12	Titan Group		A	Hardware	No	Yes
Copier	SP1020	1111111	SP1020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	76589	SP2020			A	Hardware	No	Yes
Drum	2020-856	2020856-1234				A	Accessories	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	101234	SP2020			A	Hardware	Yes	Yes
Acer copier outer shell	ACR-01	abcd123				A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020		SP2020	Young Electric	Sales De...	A	Hardware	No	Yes
SP2121 Copier	SP2121					A	Hardware	No	Yes
Sprint copier	SP1818	1818-9999				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-5555				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-4444		Hope Works	Technical	A	Hardware	Yes	Yes
Drum	2020-856	2020-4327				A	Accessories	No	Yes
Drum	2020-856	2020-4329				A	Accessories	No	Yes
Sprint copier	SP1818	1818-8594				A	Hardware	Yes	Yes
Sprint copier	SP1818	1818-0890		Hope Works	Technical	A	Hardware	No	Yes
Sprint copier	SP1818	2020-9867LU				A	Hardware	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	987	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	321	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	789	SP2020			A	Hardware	No	Yes
SP19-12 Colour Copier	SP19-123456	9990	SP19-12			A	Hardware	Yes	Yes
Sprint copier	SP1818	18-30200				A	Hardware	No	Yes
K147 Kyocera Colour Copier	1458-96523	5013512345	K147			A	Kyocera Multi...	No	Yes
Drum	2020-856					A	Accessories	No	Yes

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## VIEW THE CONVERTED ASSET STATUS

- Select the **Serialized Stock** status.

The screenshot displays the 'Machine List for Durban' application window. The 'Internal Assets' column is selected, and a dropdown menu is open, showing the following options:

- All
- Client Machines
- Internal Assets
- Serialized Stock

The 'Serialized Stock' option is highlighted. The main table below shows a list of machine assets with the following columns: Description, IdNo, CustomerName, DeptName, Status, CategoryDesc, Asset, and IsFixedAsset.

Description	IdNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier	2020	Panda Copiers		A	Hardware	No	Yes
SP19-12 Colour Copier	19-12	Titan Group		A	Hardware	No	Yes
Copier	SP1020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020			A	Hardware	No	Yes
Drum	2020-856			A	Accessories	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020			A	Hardware	Yes	Yes
Acer copier outer shell	ACR-01			A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	Young Electric	Sales De...	A	Hardware	No	Yes
SP2121 Copier	SP2121			A	Hardware	No	Yes
Sprint copier	SP1818			A	Hardware	Yes	Yes
Sprint copier	SP1818			A	Hardware	Yes	Yes
Sprint copier	SP1818	Hope Works	Technical	A	Hardware	Yes	Yes
Drum	2020-856			A	Accessories	No	Yes
Drum	2020-856			A	Accessories	No	Yes
Sprint copier	SP1818			A	Hardware	Yes	Yes
Sprint copier	SP1818	Hope Works	Technical	A	Hardware	No	Yes
Sprint copier	SP1818			A	Hardware	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020			A	Hardware	No	Yes
SP19-12 Colour Copier	SP19-123456			A	Hardware	Yes	Yes
Sprint copier	SP1818			A	Hardware	No	Yes
K147 Kyocera Colour Copier	1458-96523		K147	A	Kyocera Multi...	No	Yes
Drum	2020-856			A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020			A	Hardware	No	Yes

- You can now view the transferred item in the **Machine list for []** screen where the status is set to **Serialised Stock**.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
Staple Unit	2020-998	dr-4321				A	Accessories	No	No
Acer copier outer shell	ACR-01	ac1234				A	Accessories	No	No
Acer copier outer shell	ACR-01	ac2314				A	Accessories	No	No
Acer copier outer shell	ACR-01	ac4356				A	Accessories	No	No
Acer copier outer shell	ACR-01	ac2416				A	Accessories	No	No
Sprint copier	SP1818	1818-6589				A	Hardware	No	No
Drum	2020-856	2020-7564				A	Accessories	No	No
Drum	2020-856	2020-9085				A	Accessories	No	No
Drum	2020-856	2020-9675				A	Accessories	No	No
Drum	2020-856	2020-0093				A	Accessories	No	No
Drum	2020-856	2020-9765				A	Accessories	No	No
Staple Unit	1020-478	478-1011	1020-478			A	Accessories	No	No
Staple Unit	1020-478	478-1012	1020-478			A	Accessories	No	No
Sprint copier	SP1818	1818-1111				A	Hardware	No	No
Sprint copier	SP1818	1818-2222				A	Hardware	No	No
Drum	2020-856	2020-1111				A	Accessories	No	No
Drum	2020-856	888				A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	654	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	456	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	444	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	777	SP2020			A	Hardware	No	No
SP19-12 Colour Copier	SP19-123456	8890	SP19-12			A	Hardware	No	No
SP19-12 Colour Copier	SP19-123456	7770	SP19-12			A	Hardware	No	No
SP19-12 Colour Copier	SP19-123456	6660	SP19-12			A	Hardware	No	No

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