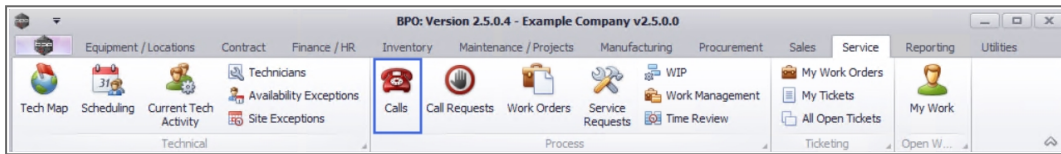


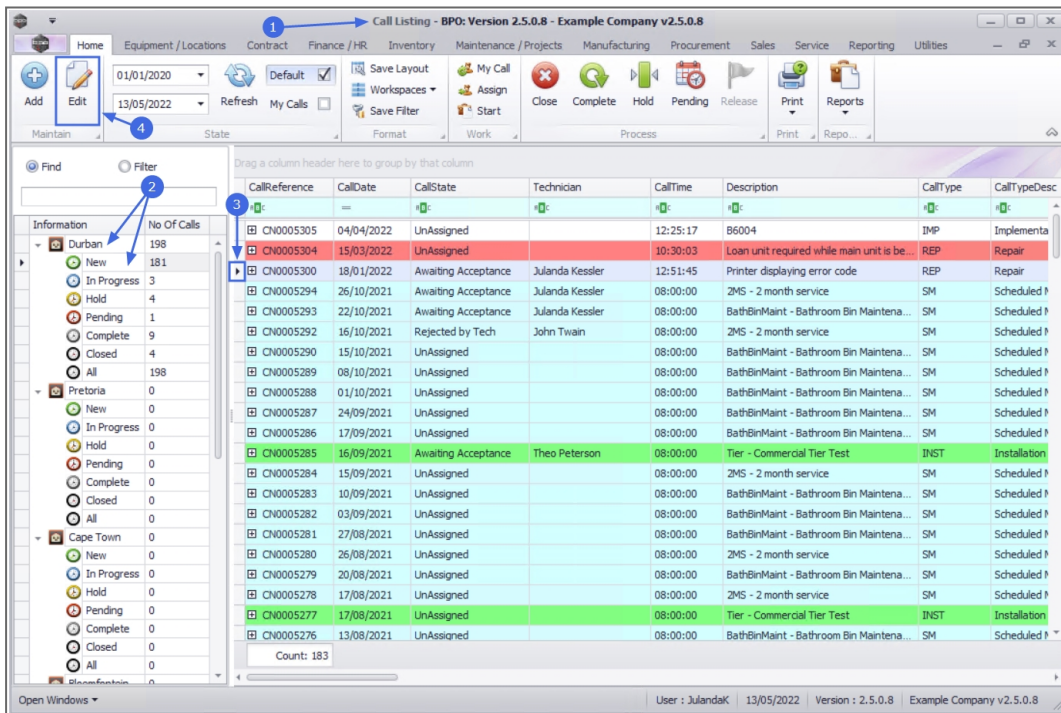
SERVICE

CALLS - ON SITE INFO

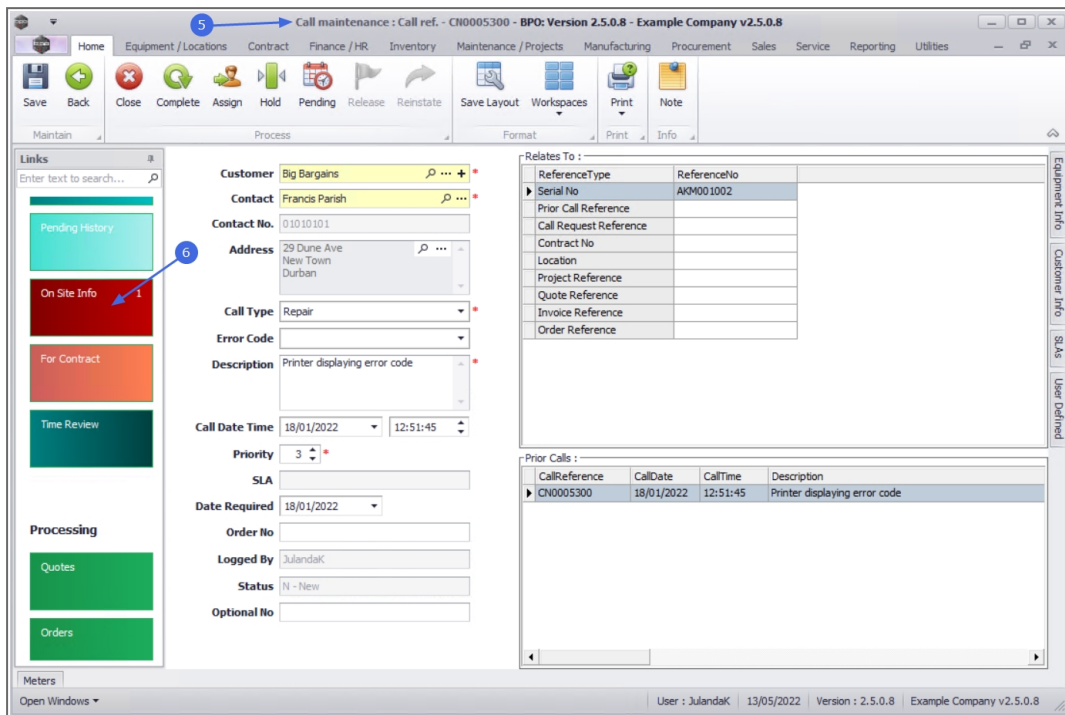
Ribbon Access: Service > Calls



1. The **Call Listing** screen will be displayed.
2. Select the **Site** and **Status**.
 - The example has **Durban** as site and the **New** status selected.
3. Click on the **row** of the call you wish to maintain the on site details for.
4. Click on **Edit**.



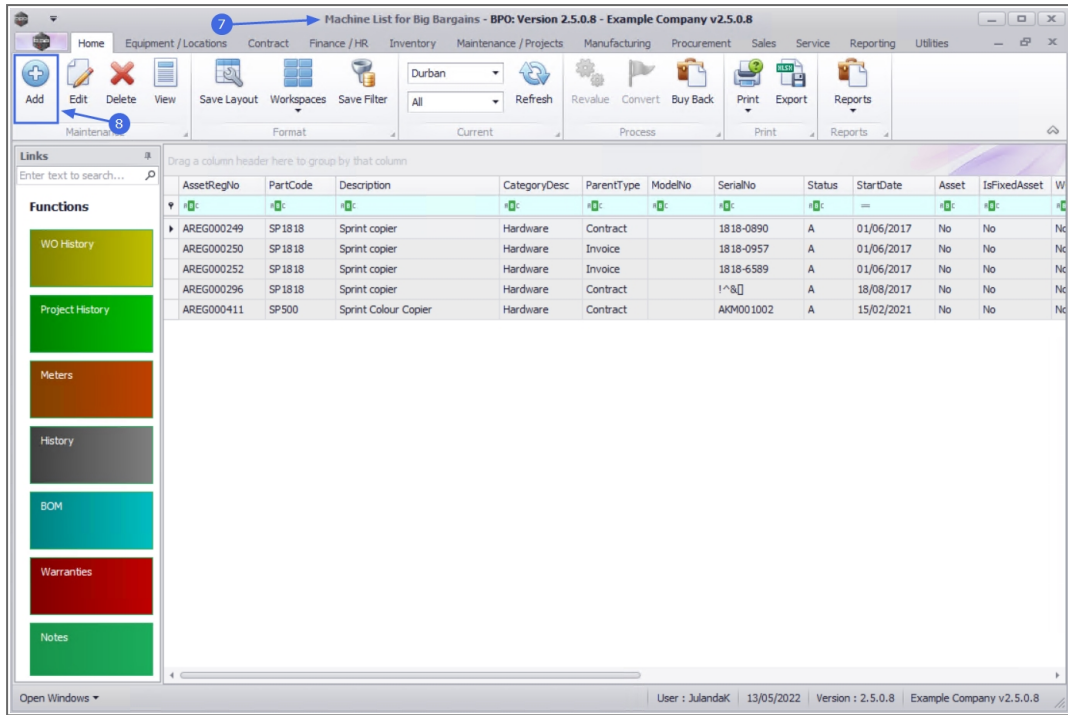
5. The **Call maintenance : Call ref - [call reference number]** screen will display.
6. Click on the **On Site Info** tile.



7. The **Asset listing or Machine List for [Customer Name]** screen will be displayed.

ADD EQUIPMENT

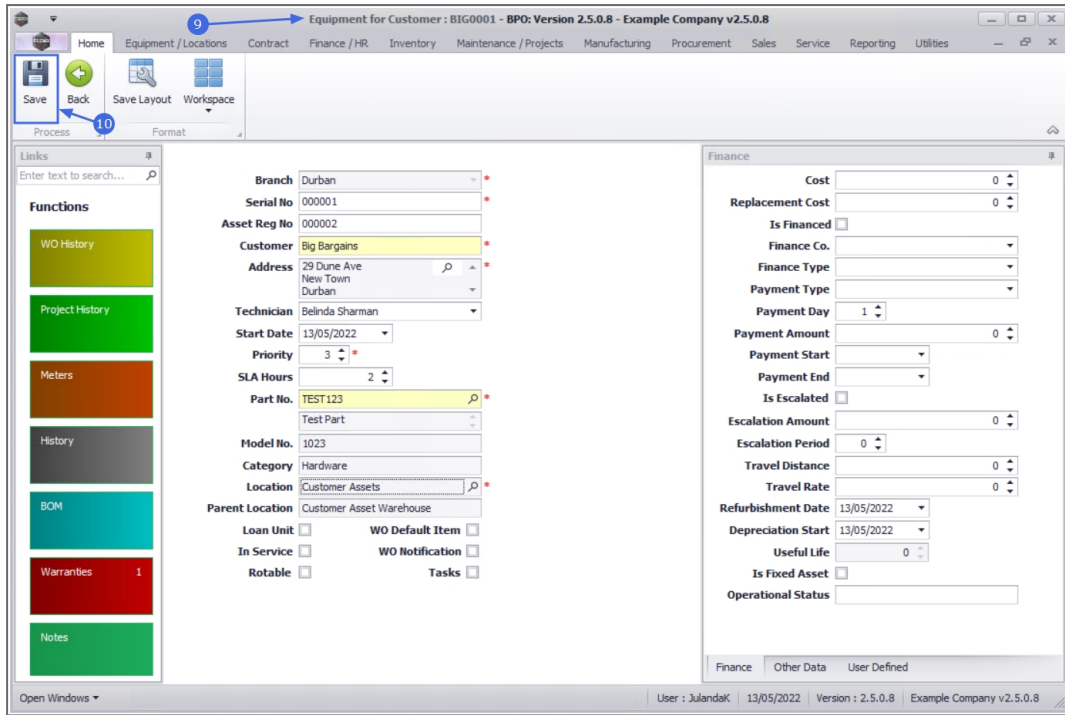
8. Click on **Add**.



9. The **Equipment for Customer : [customer code]** screen will be displayed.
10. Add the Customer asset details as required and click on **Save**.



For a detailed handling of this topic refer to [Assets - Add - Asset Details](#)



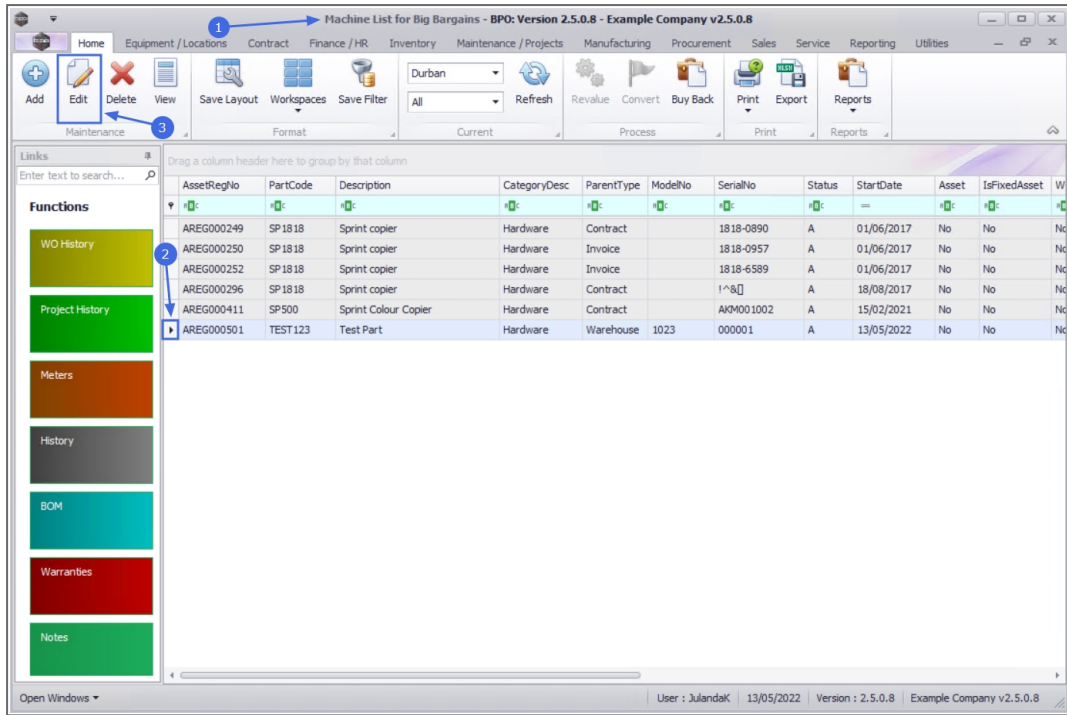
EDIT EQUIPMENT

After an asset is created, you may wish to edit certain attributes and details of the asset. Only certain asset details can be edited. You may have [user security rights](#) set in your [company configuration](#) whereby a control may be applied to these editing rights. For example, only a manager can edit certain details, for example, *incorrect serial number input* (which affects stock reports) but an administrator can edit other less impactful details.

It is important to note that if the serial number is edited for a company asset, [all](#) stock reports will be affected.

Explanations for all the **Details** and **Finance** fields can be found in [Introduction to Assets](#).

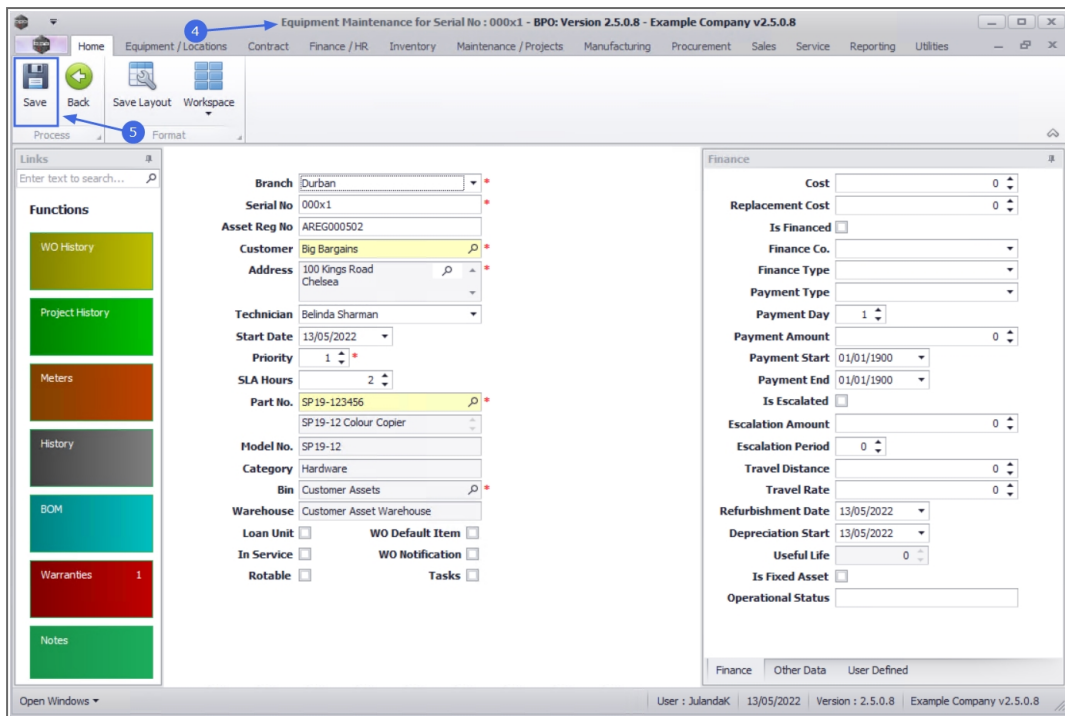
1. From the **Machine List for [customer name]** screen,
2. Click on the **row** of the asset detail you wish to make changes to.
3. Click on **Edit**.



4. The **Equipment Maintenance for Serial No : [serial number]** screen will be displayed.
5. Make the required changes to the asset details and click on **Save**.

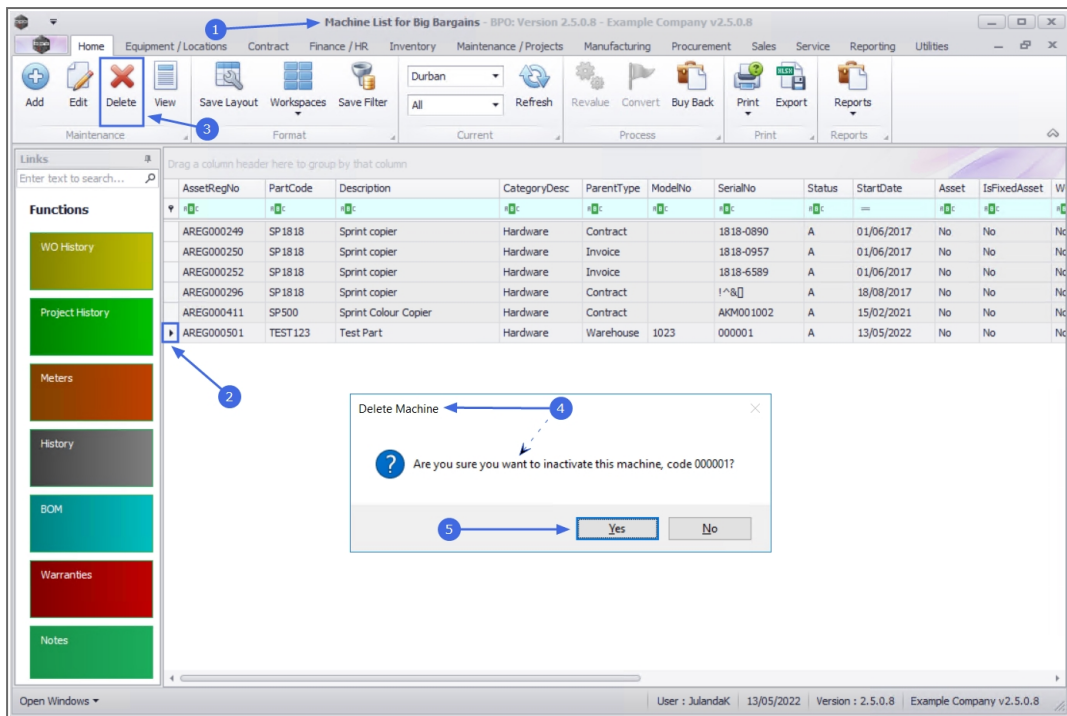


For a detailed handling of this topic refer to [Assets - Edit - Asset Details](#)



DELETE EQUIPMENT

1. From the **Machine List for [customer name]** screen,
2. Click on the **row** of the asset you wish to remove,
3. Click on **Delete**.
4. When you receive the **Delete Machine** message to confirm;
 - **Are you sure you want to inactivate this machine, code [serial number]?**
5. Click on **OK**.

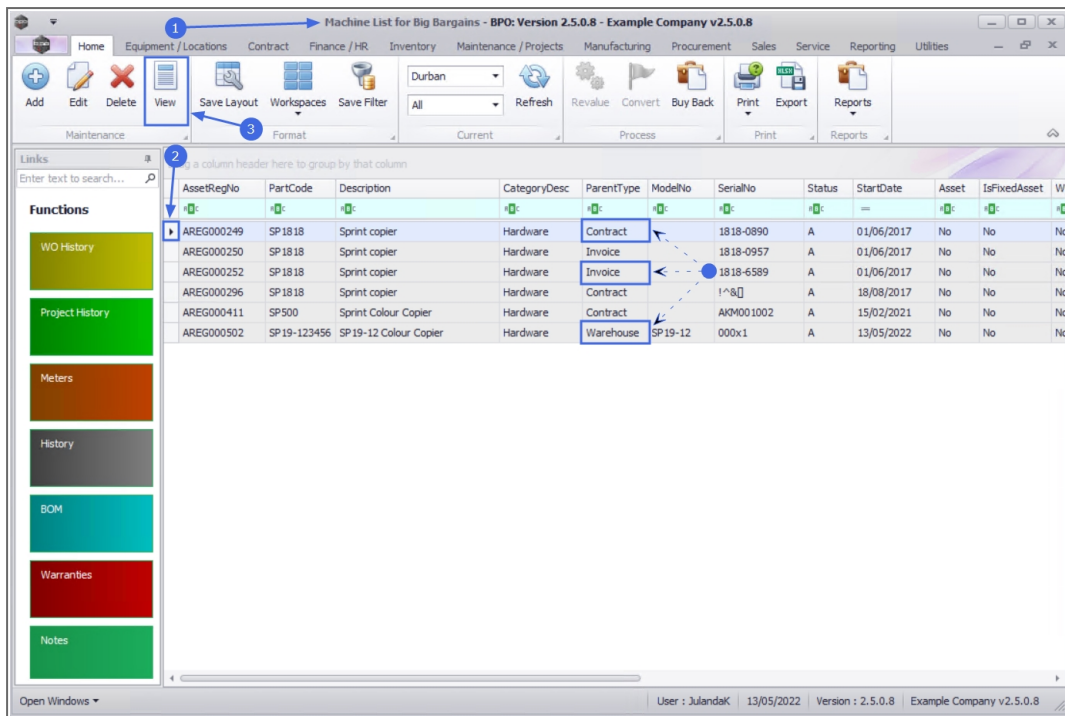


VIEW EQUIPMENT

1. On the **Machine List for [customer name]** screen,
 - Note that there are 3 potential **Parent Types**;
 - Contract,
 - Invoice, and
 - Warehouse
 - Each of the Parent Types will affect which fields and field content will display on the screen.
2. Click on the **row** of the customer asset you wish to view.
3. Click on **View**.



For a detailed handling of this topic refer to [View Client Machine](#)

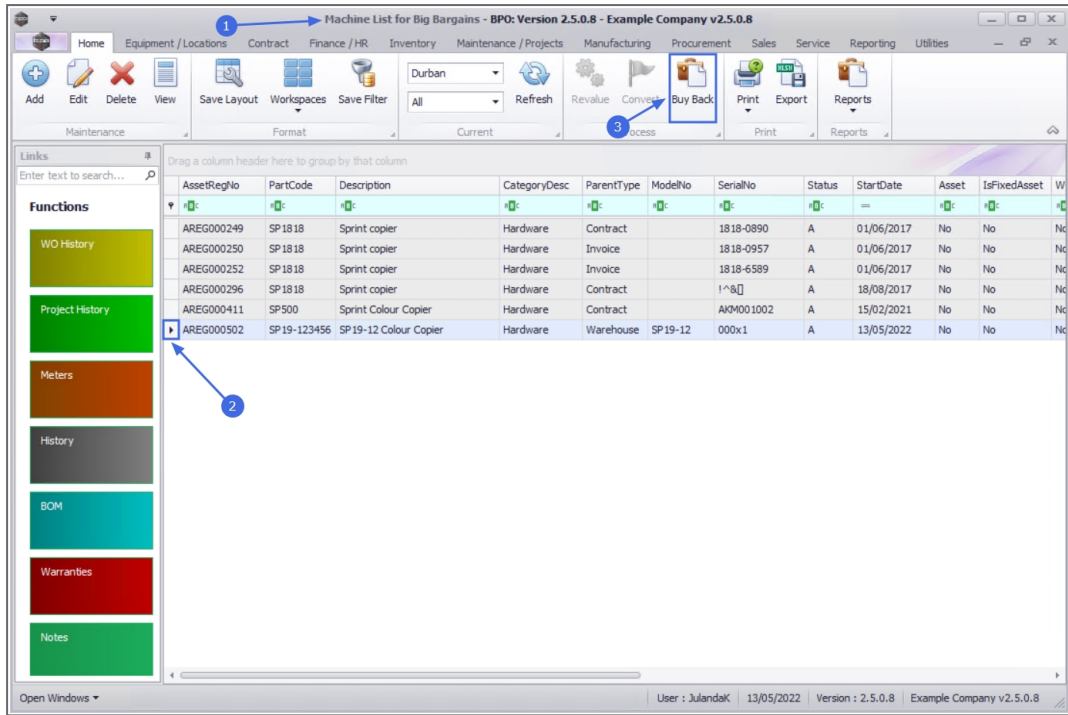


BUY BACK

Use this process only if;

- A Stock item or an Internal Asset has been incorrectly loaded as a Customer Asset
- A Contract is ending and the customer asset is to become the company property.

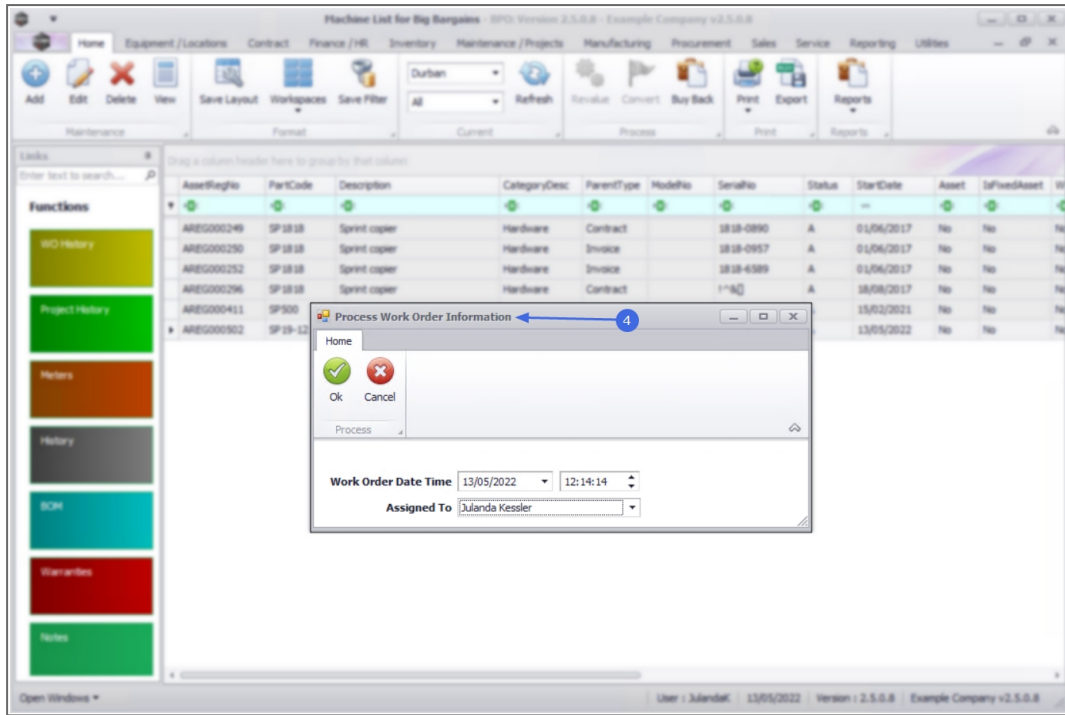
1. From the **Machine List for [customer name]** screen,
2. Click on the **row** of the asset you wish to buy back.
3. Click on **Buy Back**.



4. The **Process Work Order Information** screen will display.



Refer to **"Add Work Order Details"** on page 4 for a detailed handling of this topic.

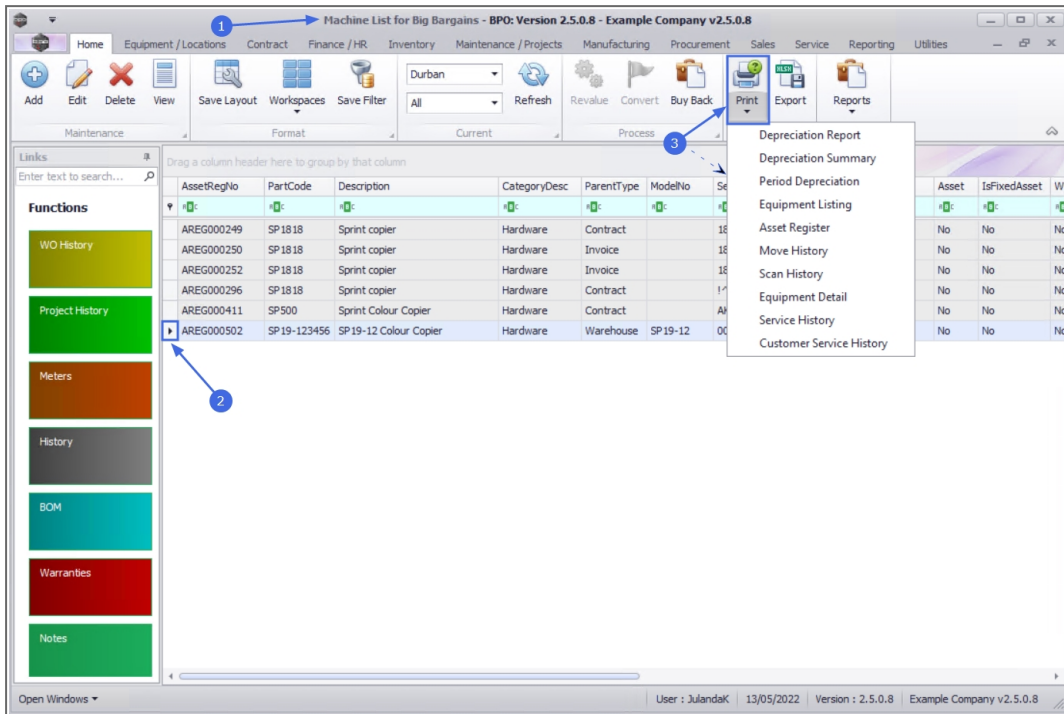


PRINT

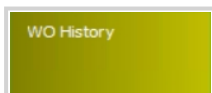
The Print option from the Machine List for Customer screen, will display a list of reports that can be generated and printed for an asset.

1. From the **Machine List for [customer name]** screen.
2. Click on the **row** of the asset you wish to print a report for.
3. Click on **Print** to display the reports drop-down list.
4. Click on the **Report** you wish to generate.
 - [Assets - Print - Depreciation Report](#)
 - [Assets - Print - Depreciation Summary Report](#)
 - [Assets - Print - Period Depreciation Report](#)
 - [View Asset Listing Report](#)
 - [Assets - Print - Asset Register Report](#)
 - [View Asset Movement History Report](#)
 - [View Asset Scan History Report](#)

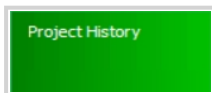
- [View Asset Detail Report](#)
- [Assets - Print - Service History Report](#)



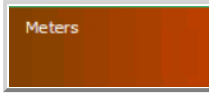
FUNCTION TILES



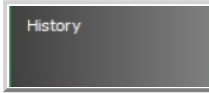
The [Work Order History](#) tile will direct you to the Work Orders for machine screen where you can **Add**, **Edit**, **Delete** and **View** a Work Order linked to the asset, as well **Close**, **Complete** and **Reinstate** a Work Order. Refer to [Introduction to Work Orders](#)



The [Project History](#) tile will direct you to the Project Listing for equipment screen where you can **Add**, **Edit**, **Apply a Project Methodology**, **Adjust Project Baseline** or **Close a Project**, as well as view **Employee and Project Time** and generate a **Progress Report** and **Print** a Project **Delivery Note**. Refer to [Introduction to Projects](#)



The [Meters](#) tile will direct you to the Meter Listing for Serial No screen where you can **Add, Delete** and **Reset a Reading**. Refer to [Assets - Meters - Add](#)



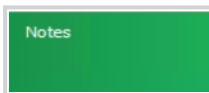
The [History](#) tile will direct you to the Transaction History for Equipment screen where you can **view** the history trail for a serialised equipment item. Refer to [Asset History](#)



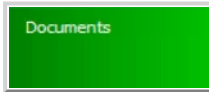
The [BOM](#) tile will direct you to the BOM Listing for equipment screen where you can **Add, Delete** and **View** the linked Bill of Materials. Refer to [Asset Bill of Materials](#)



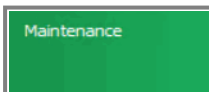
The [Warranties](#) tile will direct you to the Warranties for Equipment screen where you can **Add, Edit** and **View** the warranties linked to an item. Refer to [Assets - Warranties - View, Add, Edit](#)



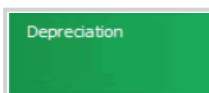
The [Notes](#) tile will direct you to the Notes Listing for Serial No screen where you can **Add** and **view** notes and comments recorded to a particular asset. Refer to [Assets - Notes - View, Add](#)



The [Documents](#) tile will direct you to the Documents for Equipment screen where you can **Add, Edit, Delete** and **View** the digital documents linked to an Asset. Refer to [Equipment Documents](#)



The [Maintenance](#) tile will direct you to the Maintenance Methodology for Asset screen where you can **Add, Edit** and **Delete** a maintenance task issued. Refer to [Link a Task](#)



The [Depreciation](#) tile will direct you to the Asset Depreciation screen where you can **view** the depreciation details for an Asset. Refer to [Asset Depreciation History](#)

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