

EQUIPMENT

INTRODUCTION TO ASSETS

In Nucleus Service an asset can be:

1. An **Internal Asset**: This is an item that would be owned by a company and can be used as a device to generate revenue through rental. This will have been a serialised stock item that has been **converted into an asset** prior to rental.
2. A **Customer (Client) Asset**: This is where a customer has purchased a serialised stock item and is currently the owner of said item.

Note:

- A **serialised stock item** is not an asset, it is an item in store, ready to be sold, without a rental or service agreement. It only becomes an asset when **converted from a stock item**. Once an item is sold (and invoiced), Nucleus Service will 'move' it into the Customer Asset Warehouse, ready to attach a contract to it, if necessary, for servicing.
- The Nucleus **Asset Listing** screen contains a data grid of all type of items; Client Machines, Internal Assets and Serialised Stock but the latter are not actually 'assets' until the above-mentioned conversion.

Criteria for an asset would be:

- i. A **unique** serial number
- ii. Scheduled **task planning**
- iii. Traceability (**movement history**, etc.)
- iv. **Contract Items**

ASSET LISTING SCREEN

Ribbon Select Equipment and Locations > Assets



- The **Machine Listing** screen will be displayed.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	StartDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UsefulLife	IsFinancial	PaymentTy...	SupplierNo...	FinanceTy...	PaymentDay
Sprint Multi Functional Copier	A300	A300-38296751	A300	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A500T	A500T-81227702	A500T	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A9603	A9603-02254423	A9603	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A990	A990-79350927	A990	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	AV5588	AV5588-99487269	AV5588	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	BF1470	BF1470-58075119	BF1470	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	B29352	B29352-84039403	B29352	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	C8000	C8000-84555546	C8000	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CD7752	CD7752-98637847	CD7752	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CT3699	CT3699-83617863	CT3699	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D08029	D08029-84555564	D08029	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D86547	D86547-91142229	D86547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D543F600	D543F600-17180313	D543F6...	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EA3V866	EA3V866-56846448	EA3V866	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EC7536	EC7536-69835409	EC7536	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EE0258	EE0258-91209854	EE0258	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EV1P559	EV1P559-96097518	EV1P559	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F9314	F9314-94394603	F9314	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F98528	F98528-77522811	F98528	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	FW8520	FW8520-80142055	FW8520	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GL6547	GL6547-65971345	GL6547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GH4564	GH4564-37825793	GH4564	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	H14T5P	H14T5P-11445157	H14T5P	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	HV1291	HV1291-10789704	HV1291	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	IP9485	IP9485-39929296	IP9485	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	JQ7537	JQ7537-49188181	JQ7537	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	K3500	K3500-99716569	K3500	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	KP0323	KP0323-40271804	KP0323	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

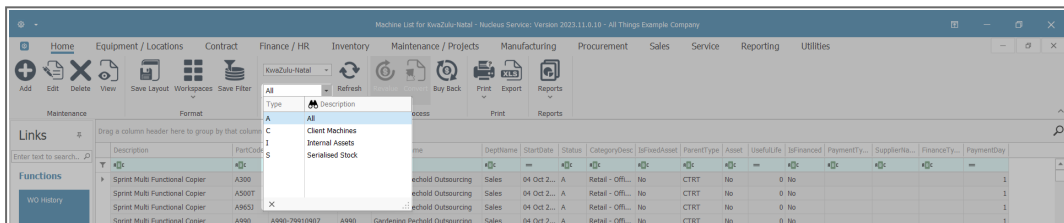
Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

The Asset Type Filter

By default, the **Asset Type** or filter in this screen is set to view **All** serialised items.

- Click on the **drop-down arrow** to view the Status filter menu:
 - **Client Machines:** View serialised items that **belong to customers**.
 - **Internal Assets:** View serialised items that **belong to the company**, e.g. internal rental machines
 - **Serialised Stock:** View serialised items **in stock ready for sale**.
- In this image the status has been kept as **All**.

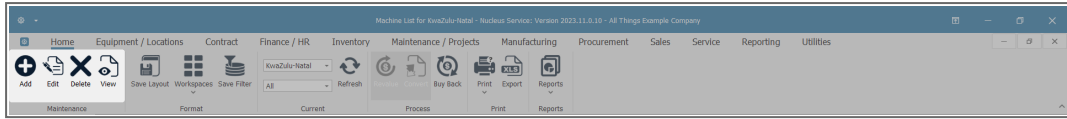


ASSETS ACTION BUTTONS

MAINTENANCE

From this screen, you can:

- [Add](#) an Asset
- [Edit](#) an Asset
- [Delete](#) an Asset
- [View](#) an Asset:
 - [View Client Machine](#)
 - [View Internal Asset](#)
 - [View Serialised Stock Item](#)



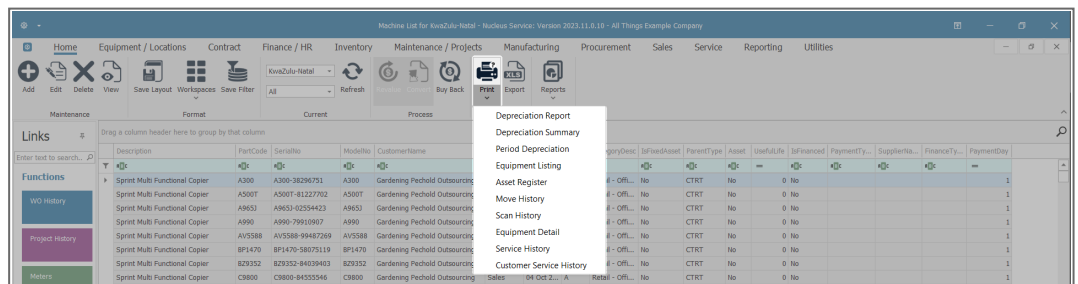
PROCESS

- [Revalue](#) an Asset
- [Convert](#) an Asset
- [Buy Back](#) an Asset



PRINT

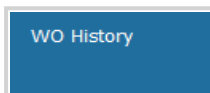
- The following **Asset Reports** can be printed from this screen:
 - [Depreciation Report](#)
 - [Depreciation Summary](#)
 - [Period Depreciation](#)
 - [Equipment Listing](#)
 - [Asset Register](#)
 - [Move History](#)
 - [Scan History](#)
 - [Equipment Detail](#)
 - [Service History](#)



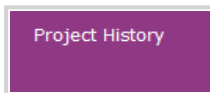
ASSET FUNCTIONS TILES

On the left side of the **Machine List for []** screen is the **Links** panel which contains the Asset **Functions** and **Processing** tiles. Each tile, when clicked on, will take you to further information concerning the selected asset.

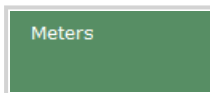
Important Note: When working from the **Asset Listing (Machine List for Site)** screen, ensure that you have selected the correct asset before you click on any tile.



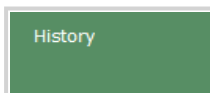
The **WO History** tile will direct you to the [Work Orders for machine](#) screen, where you can Add, Edit, Delete, View, Close, and Complete a work order linked to the asset.



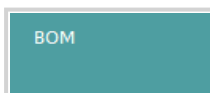
The **Project History** tile will direct you to the [Project Listing for equipment](#) screen, where you can Add, Edit, Apply a Project Methodology or Adjust Project Baseline, as well as maintain Employee and Project Time.



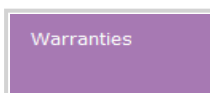
The **Meters** tile will direct you to the [Meter Listing for Serial No.](#) screen, where you can Add, Delete or Reset a meter reading linked to the asset.



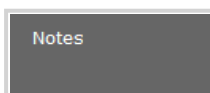
The **History** tile will direct you to the [Transaction History for Equipment](#) screen, where you can view a history trail of the Valuation, Transactions and Movement of an asset.



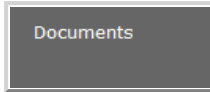
The **BOM** tile will direct you to the [BOM Listing for equipment](#) screen, where you can Add, Delete and View BOMs linked to the asset.



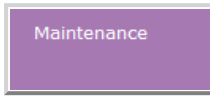
The **Warranties** tile will direct you to the [Warranties for Equipment](#) screen, where you can Add, Edit and View warranties, and Warranty Claims linked to the asset.



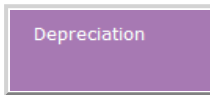
The **Notes** tile will direct you to the [Note Listing for Serial No.](#) screen, where you can Add a note linked to the asset.



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



The **Maintenance** tile will direct you to the [Maintenance Methodology for Asset](#) screen., where you can Add, Edit and Delete maintenance methodologies linked to the asset.



The **Depreciation** tile will direct you to the [Asset Depreciation](#) screen, where you can View the current period and depreciation date.

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