

EQUIPMENT

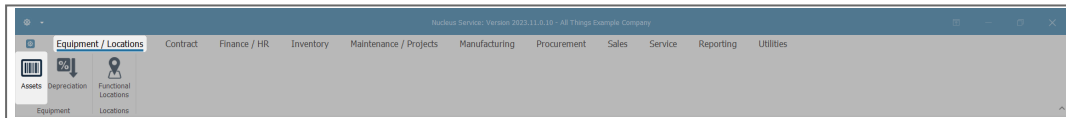
ASSETS - ADD CUSTOMER ASSET DETAILS

A **Customer Asset** should only be added in this manner when a customer brings in a machine, for service or repair, that was bought elsewhere (this would be a **Client Owned Asset**).

In this process, we will navigate from the **Asset Listing** (Machine List for []) screen. A customer asset can also be added from the Customer Listing screen.

ASSET LISTING SCREEN

Ribbon Select **Equipment and Locations > Assets**



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

Description	PartCode	SerialNo	ModelNo	CustomerName	Department	StartDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UsefulLife	IsFinancial	PaymentTy...	SupplierNo...	FinanceTy...	PaymentBay
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-81227762	A500T	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A9653	A9653-82554423	A9653	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A990	A990-79919907	A990	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A92588	A92588-99497299	A92588	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	BP1476	BP1476-28075119	BP1476	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	B29352	B29352-84839483	B29352	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	C9800	C9800-94555546	C9800	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	CT3690	CT3690-83617863	CT3690	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D08729	D08729-61955854	D08729	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D86247	D86247-91142229	D86247	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D547600	D547600-17183213	D547600	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EA3V986	EA3V986-56846448	EA3V986	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EC7536	EC7536-64835499	EC7536	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EE0258	EE0258-11209854	EE0258	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EV1P559	EV1P559-90097518	EV1P559	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	FX214	FX214-84334603	FX214	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F88528	F88528-77522811	F88528	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F98528	F98528-80142055	F98528	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	G26547	G26547-65971345	G26547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GH4564	GH4564-37265793	GH4564	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	H1475P	H1475P-11445157	H1475P	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	HV1591	HV1591-10708704	HV1591	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	JP9685	JP9685-39952936	JP9685	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	Q27537	Q27537-49188181	Q27537	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	K3598	K3598-99915593	K3598	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	KP9323	KP9323-40271894	KP9323	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.

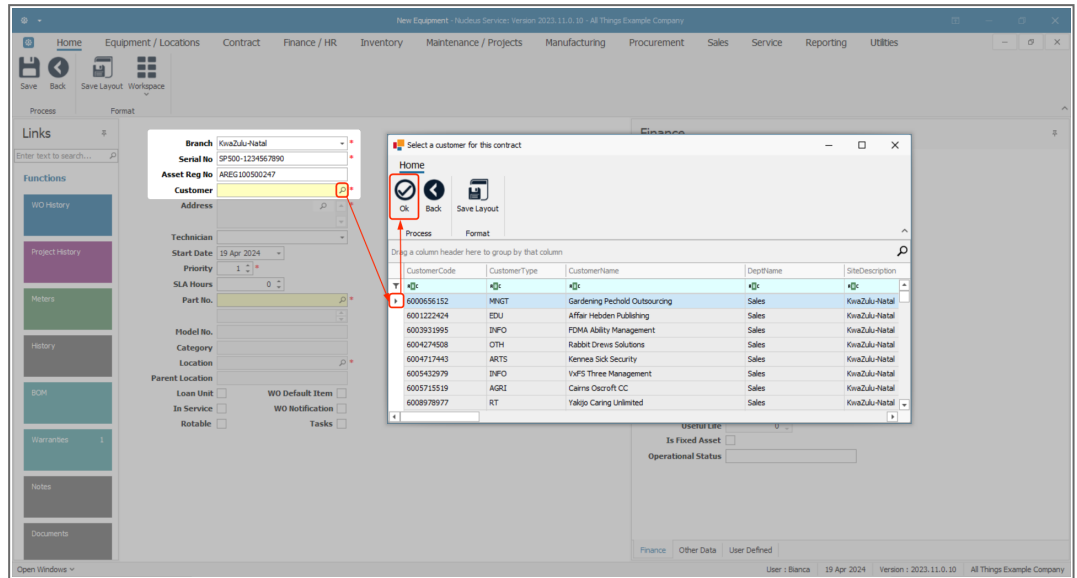
- Click on **Add**.



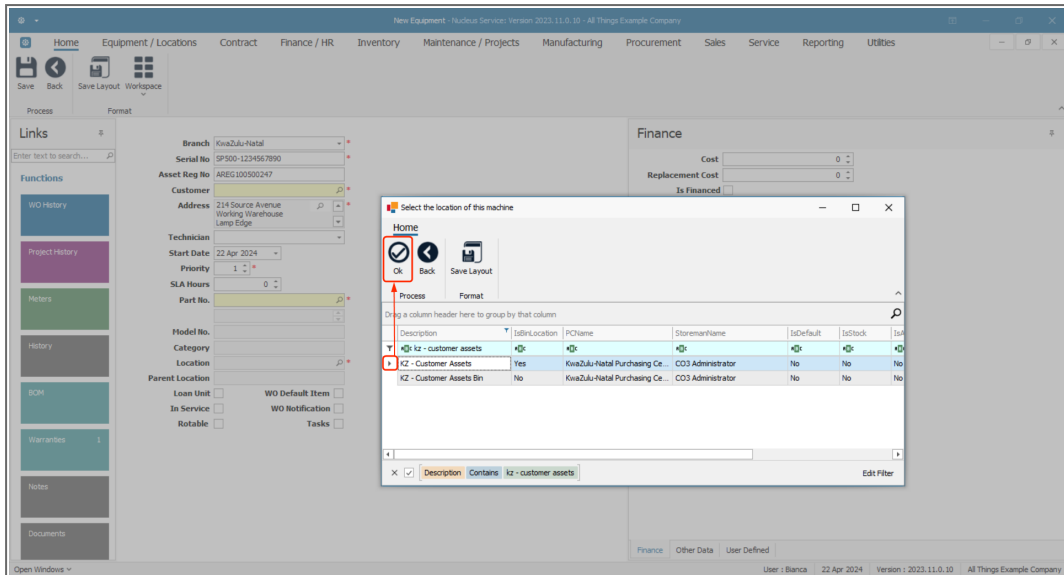
ADD CUSTOMER ASSET DETAILS

- The **New Equipment** screen will open.
- Add the customer asset **details**:
 - **Branch**: The branch or site the customer asset is to be linked to. This is auto populated by the Site selected in the Machine Listing screen.
 - **Serial No.**: Type in the serial no. of the customer asset. This is the number provided by the supplier of the asset.
 - **Asset Register No.**: Also known as a Fixed Asset Number and is generally used for internal assets to make it easier for the maintenance team to identify the assets as per the company's unique internal system.
 - **Customer**: Click on the **search** button and select from the pop up screen, the name of the client that owns

the asset. If the customer is not listed here then follow the process to [add a new customer](#).

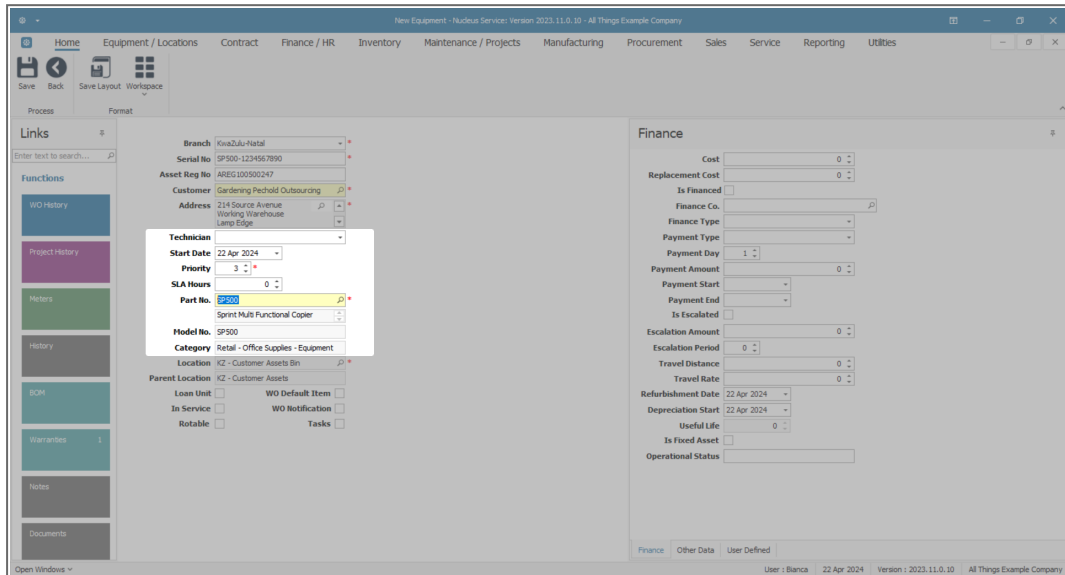


- **Location:** The **Select the Location...** screen will pop up as soon as the Customer and Address fields are populated. The Customer Asset Warehouse bin should be selected in this pop-up screen. Click on Ok. (This provides a temporary non-stock and non-asset warehouse location for the item until it is put on contract.)
- **Parent Location:** This will auto populate with the warehouse linked to the bin location above.
- **Address:** May auto populate if only 1 shipping address exists on the customer. Otherwise, search for and select the relevant shipping address (where the asset is physically).



- **Technician:** Click on the drop-down arrow and link a specific employee to this customer asset, where required. (This will be marked as **'Is Default'** in the employee look-up when assigning a technician).
- **Start Date:** This will auto 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.
- **Priority:** Either type in or click on the arrow indicators and select an alternative priority number, if required. This is the work order priority of the customer machine. (1 = Most Important, 5 = Least Important).
- **SLA Hours:** Type in the Service Level Agreement (in hours). This is the agreed upon response time from when the call is logged by the client.
- **Part No. and Description:** Click on the **search** button and select from the pop-up screen, the number of the part to be linked as a customer asset. As this number is selected, the second field will populate with the description of the Part No.

- **Model No.:** This will display the model no. linked to the Part No. above, if applicable.
- **Category:** This will populate with the category linked to the part no. above e.g. Hardware.

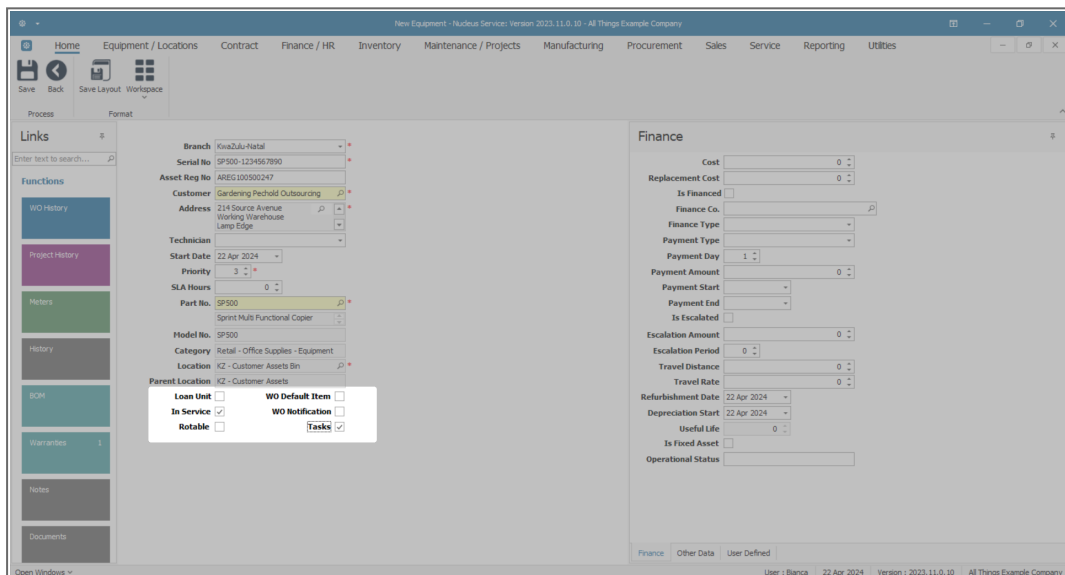


The screenshot shows the 'Add Customer Asset Details' form in the Nucleus Service software. The form is divided into several sections:

- Links:** Branch (KwaZulu-Natal), Serial No (SP500-1234567890), Asset Reg No (AREG1234567890), Customer (Gardening Pechoold Outsourcing), Address (214 Source Avenue, Working Warehouse, Lamp Edge), Technician (), Start Date (22 Apr 2024), Priority (3), SLA Hours (0), Part No (5200), Model No (SP500), Category (Retail - Office Supplier - Equipment), Location (KZ - Customer Assets Bin), Parent Location (KZ - Customer Assets).
- Operational Status:** Loan Unit (), In Service (), Rotable (), WO Default Item (), WO Notification (), Tasks ().
- Finance:** Cost (0), Replacement Cost (0), Is Financed (), Finance Co. (), Finance Type (), Payment Type (), Payment Day (1), Payment Amount (0), Payment Start (), Payment End (), Is Escalated (), Escalation Amount (0), Escalation Period (0), Travel Distance (0), Travel Rate (0), Refurbishment Date (22 Apr 2024), Depreciation Start (22 Apr 2024), Useful Life (0), Is Fixed Asset (), Operational Status ().

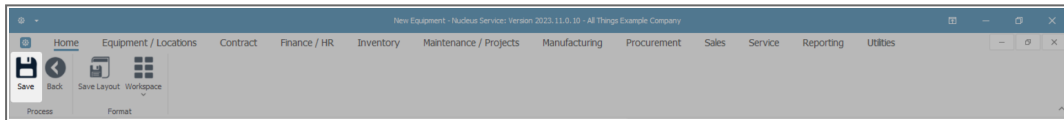
- **Loan Unit:** As this is a customer machine and not a loan unit, this check box will remain un-ticked. The Loan Unit flag is only ever used by the system when issuing an internal asset against a swap out request.
- **In Service:** Select this check box to indicate whether this asset falls within a Service Plan and needs to be periodically serviced. (Similar to a vehicle having a service plan.) This functionality is not currently in use in Nucleus Service.
- **Rotable:** Select this check box to indicate whether this asset is included in a rotatable service plan. Rotable is a servicing method in which an already-repaired equipment item is exchanged for a failed equipment item, which in turn is repaired and kept for another exchange. This functionality is not currently in use in Nucleus Service.

- **WO Default Item:** If this option is set in the [company configuration](#), one machine per customer needs to be marked as the default (this machine will pull through automatically when a customer is selected on a new call).
- **WO Notification:** Select this check box to indicate whether this asset is linked to an automated/scheduled task set up. A work order notification will be sent out when the asset is due to be serviced.
- **Tasks:** This check box is related to the above and is linked to the Maintenance / Project screen. Refer to [Introduction to Tasks](#) for more information.



- Once the customer asset details have been added, you can now follow the processes to:
- Add the asset [Finance](#) details
- Add the asset [Other Data](#) and
- Add the asset [User Defined](#) fields, as required,

- before **saving** the new customer asset.



VIEW ADDED CUSTOMER ASSET

- You will return to the **Machine List for []** screen.
- You will be able to view the added customer asset in the data grid.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	StarDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UsefulLife	IsFinanced	PaymentType
Sprint Multi Functional Copier	SP500	SP500-1234567890	SP500	Gardening Pechold Outsourcing	Sales	22 Apr 2024	A	Retail - Office	No	WHSE	No	0	No	
Sprint Multi Functional Copier	SP2020	SP2020-82352587	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-14493572	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-86990138	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	

Related Topics

- [Assets - Add Customer Asset Details](#)
- [Assets - Add - Finance Details](#)



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

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