

EQUIPMENT

ASSETS - VIEW INTERNAL ASSET

The **View** button in the **Asset**¹ Listing screen (**Machine List for []** screen) allows you to view more details with regards to a selected asset.

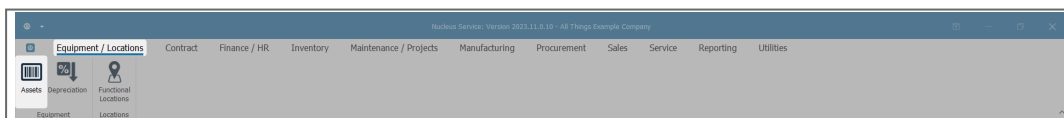
This screen lists relevant asset information depending on whether the asset selected is:

- a [Client Machine](#) (Customer Asset)
- an [Internal Asset](#) or
- a [Serialised Stock Item](#)

In this process, we will examine the details for an **internal asset**. This is an asset that is **owned by the company**, that will be used for **rental** or **loan unit** purposes, i.e. to generate a revenue.

ASSET LISTING SCREEN

Ribbon Select **Equipment and Locations > Assets**



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

¹An asset is an item that is generating income for the company e.g. a rental item or an item that has been sold to a customer.

Description	PartCode	SerialNo	ModelNo	CustomerName	DepName	StartDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UseFullLife	IsFinancial	PaymentTy...	SupplierNo...	FinanceTy...	PaymentDay
Sprint Multi Functional Copier	A300	A300-38296751	A300	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A500T	A500T-81227702	A500T	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A9603	A9603-02594423	A9603	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A999	A999-7993907	A999	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	AV5588	AV5588-99487269	AV5588	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	BF1470	BF1470-58075119	BF1470	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	B29352	B29352-84039403	B29352	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	C9800	C9800-84555546	C9800	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CD7752	CD7752-98637847	CD7752	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CT3690	CT3690-83617863	CT3690	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	DM9750	DM9750-83955854	DM9750	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	DM6547	DM6547-91142229	DM6547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	DS49600	DS49600-17186312	DS496...	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EA3V866	EA3V866-56846448	EA3V866	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EC7536	EC7536-69835409	EC7536	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EE0258	EE0258-91209854	EE0258	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EV1P559	EV1P559-90097518	EV1P559	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F9214	F9214-84594603	F9214	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F88238	F88238-75228111	F88238	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	FW8520	FW8520-86142055	FW8520	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GL6547	GL6547-37871345	GL6547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GH4564	GH4564-37875793	GH4564	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	H14T5P	H14T5P-11445157	H14T5P	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	HV1591	HV1591-10708704	HV1591	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	IP9485	IP9485-39929256	IP9485	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	X37537	X37537-49188181	X37537	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	K3500	K3500-09718569	K3500	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	KP9323	KP9323-40271894	KP9323	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	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.

- To ensure that you will select the correct type of asset, ensure that the Status is set to **Internal Assets**.

Type	Description	ModelNo	CustomerName	DepName	StartDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UseFullLife	IsFinancial	PaymentTy...
A	All												
C	Client Machines												
I	Internal Assets												
S	Serialized Stock												
		990	FDMA Ability Management	Sales	29 Sep 2023	A	Retail - Office	No	SNW	No	60	No	
		3721	Painter Burghall Solutions	Sales	04 Oct 2023	A	Retail - Office	No	CTRT	No	0	No	
		3406	Painter Burghall Solutions	Sales	04 Oct 2023	A	Retail - Office	No	CTRT	No	0	No	
		X099140	Painter Burghall Solutions	Sales	04 Oct 2023	A	Retail - Office	No	CTRT	No	0	No	
		W00047	Painter Burghall Solutions	Sales	04 Oct 2023	A	Retail - Office	No	CTRT	No	0	No	
		UV3619	Painter Burghall Solutions	Sales	04 Oct 2023	A	Retail - Office	No	CTRT	No	0	No	

INTERNAL ASSET – PARENT TYPES

- With the **Site** selected as required and the Status set to **Internal Assets**,
- you will note that there are **3** potential **Parent Types** for an internal asset;
- **CTRT** - Contract
- **WHSE** - Warehouse
- **WKOR** - Work Order

Each of these Parent Types will affect which **fields** and what **field content** can be viewed in the next screen.

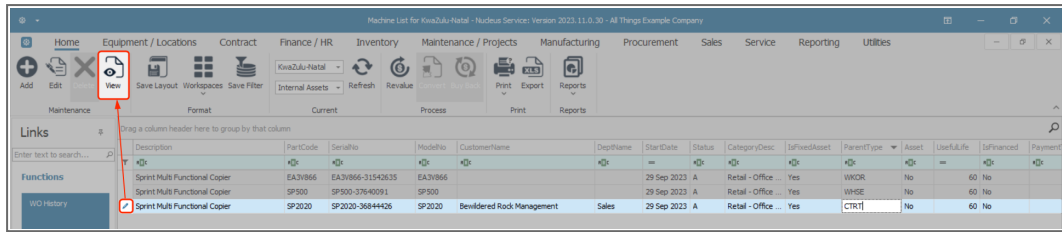
In the following screen shots, we will look at an example of an internal asset linked to each Parent Type.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	StarDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UsefulLife	IsFinanced	Payment
Sprint Multi Functional Copier	EA3V866	EA3V866-31542635	EA3V866			29 Sep 2023	A	Retail - Office	Yes	WKOR	No	60	No	
Sprint Multi Functional Copier	SP500	SP500-37640091	SP500	Bewildered Rock Management	Sales	29 Sep 2023	A	Retail - Office	Yes	WHSE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-36844426	SP2020			29 Sep 2023	A	Retail - Office	Yes	CTRT	No	60	No	

INTERNAL ASSET – CTRT

SELECT THE ASSET

- In the **Machine List for []** screen,
- Select the **row** of the internal asset you wish to view.
- Take note of the Parent Type of this asset. In this example it is: **CTRT** - Contract.
- Click on **View**.

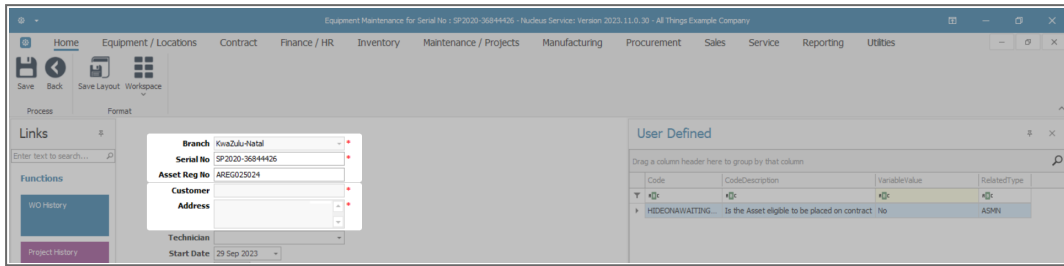


- The **Equipment Maintenance for Serial No: []** screen will open.
- You will note that there is only a **Back** button. This is because this is a view only screen, no changes can be saved in this screen.

VIEW ASSET DETAILS

- The left side of this screen lists the asset details.
- The first **3** fields are used across all asset types:
 - **Branch:** This is the branch or Site the asset is linked to.
 - **Serial No.:** This is the unique identifier of the asset provided by the manufacturer of the item.
 - **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.
- The next **2** fields: **Customer** and **Address**, are used only when dealing with a Customer Asset. In this topic we are looking at an **internal asset** so these fields will remain blank.
 - **Customer:** This field will be blank for an Internal Asset.
 - (This field will only be populated if this is a Client Machine and will then contain the name of the client that owns the asset.)
 - **Address:** This field will be blank for an Internal Asset.
 - (This field will only be populated with the

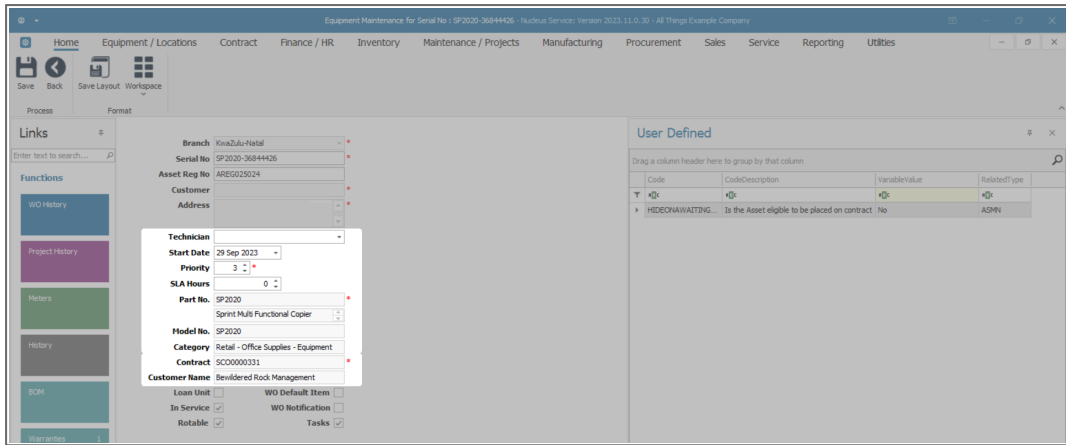
address of the client - as above - if this is a Client Machine.)



- The following fields are used across all asset types:
- **Technician:** View the technician currently linked to this item.
- **Start Date:** View the date that this internal asset was acquired.
- **Priority:** View the priority of this internal asset. (1 = Most Important, 5 = Least Important).
- **SLA Hours:** View the Service Level Agreement Monitor (in hours).
- **Part No. and Description:** View the part no. and description of the asset.
- **Model No.:** View the model no. of the asset, if applicable.
- **Category:** View the category of the asset e.g. Hardware, Accessories.

CTRT-specific Fields

- The next **2** field names will differ depending on the Internal Asset **Parent Type**. In this example, an asset with the Parent Type: **CTRT** - Contract was selected.
 - **Contract:** This will be populated with the contract no. linked to the selected internal asset.
 - **Customer Name:** This will be populated with the customer linked to the above mentioned contract.

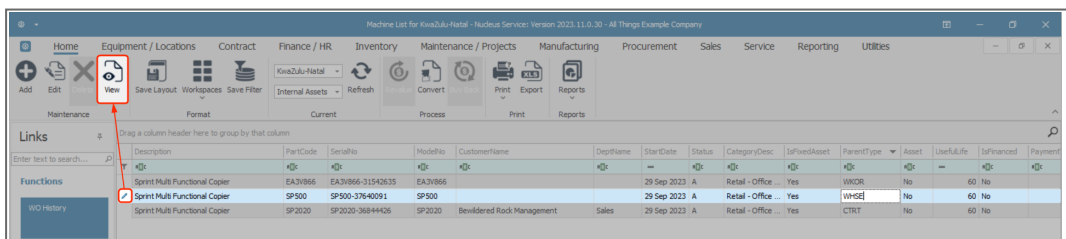


If the asset selected had the **Parent Type = WHSE** - Warehouse, these fields would be different:

INTERNAL ASSET – WHSE

SELECT THE ASSET

- In the **Machine List for []** screen,
- Select the **row** of the internal asset you wish to view.
- Take note of the Parent Type of this asset. In this example, it is: **WHSE** - Warehouse.
- Click on **View**.



- The **Equipment Maintenance for Serial No: []** screen will open.

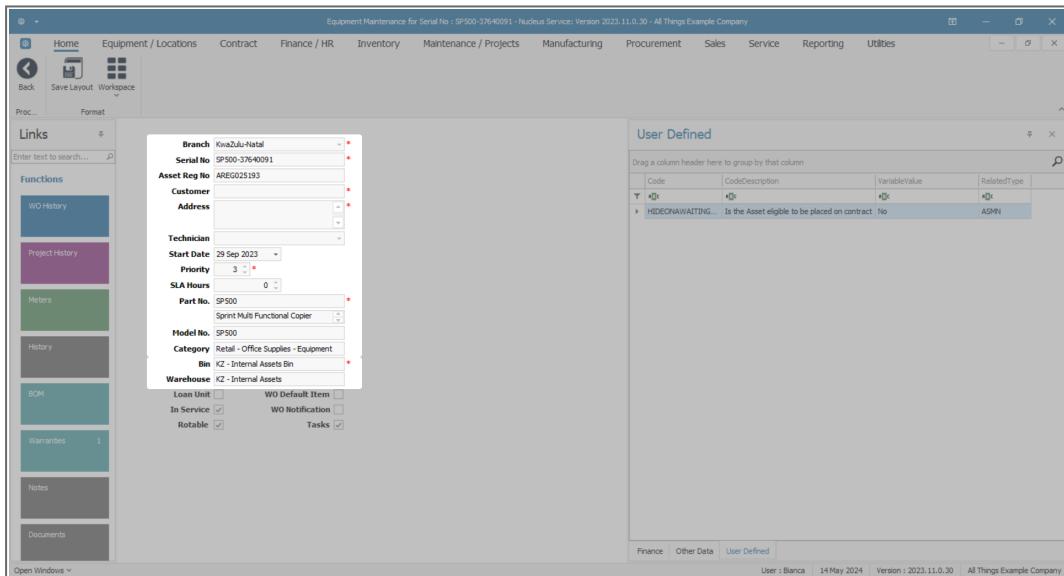
VIEW ASSET DETAILS

- All of the fields are the same as described above for Internal Asset - CTRT, except for the **Contract** and **Customer Name** fields.

WHSE-specific Fields

- These have been replaced with **Bin** and **Warehouse**.
 - **Bin:** This field will be populated with the bin name linked to the internal asset warehouse (below) set up in the system.
 - **Warehouse:** This field will be populated with the name of the specific internal asset warehouse set up in the system.

In this example, the item is in the **Internal Assets** bin within the **Assets Warehouse**.



Equipment Maintenance for Serial No. | SP500-37640091 - National Services: Version: 2023.11.0.30 - All Things Example Company

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

Back | Save Layout | Workspace

Proc... | Format

Links

Enter text to search...

Functions

- WO History
- Project History
- Notes
- History
- ROM
- Warranties
- Notes
- Documents

Branch: KwaZulu-Natal

Serial No: SP500-37640091

Asset Reg No: ARE6025193

Customer: [Dropdown]

Address: [Dropdown]

Technician: [Dropdown]

Start Date: 29 Sep 2023

Priority: 3

SLA Hours: 0

Part No: SP500

Model No: Sprint Multi Functional Copier

Category: Retail - Office Supplies - Equipment

Bin: KZ - Internal Assets Bin

Warehouse: KZ - Internal Assets

Loan Unit: WO Default Item:

In Service: WO Notification:

Rotable: Tasks:

User Defined

Drag a column header here to group by that column

Code	CodeDescription	VariableValue	RelatedType
Y	HIDEONWAITING...	Is the Asset eligible to be placed on contract	No
			ADMIN

Finance | Offer Data | User Defined

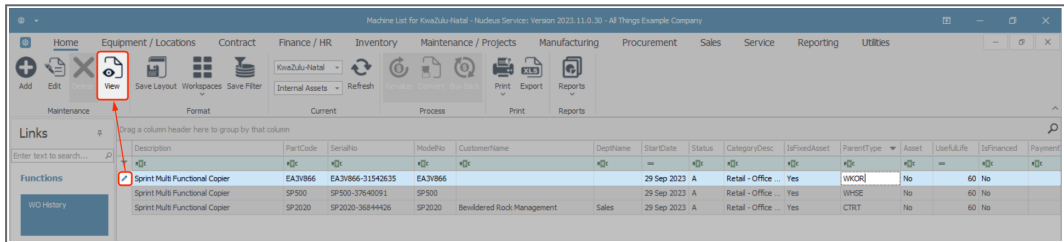
User: Blanca | 14 May 2024 | Version: 2023.11.0.30 | All Things Example Company

If the asset selected had the Parent Type = **WKOR** - Work Order, these fields would be different again:

INTERNAL ASSET - WKOR

SELECT THE ASSET

- In the **Machine List for []** screen,
- Select the **row** of the internal asset you wish to view.
- Take note of the Parent Type of this asset. In this example, it is: **WKOR - Work Order**.
- Click on **View**.



1. The **Equipment Maintenance for Serial No: []** screen will open.

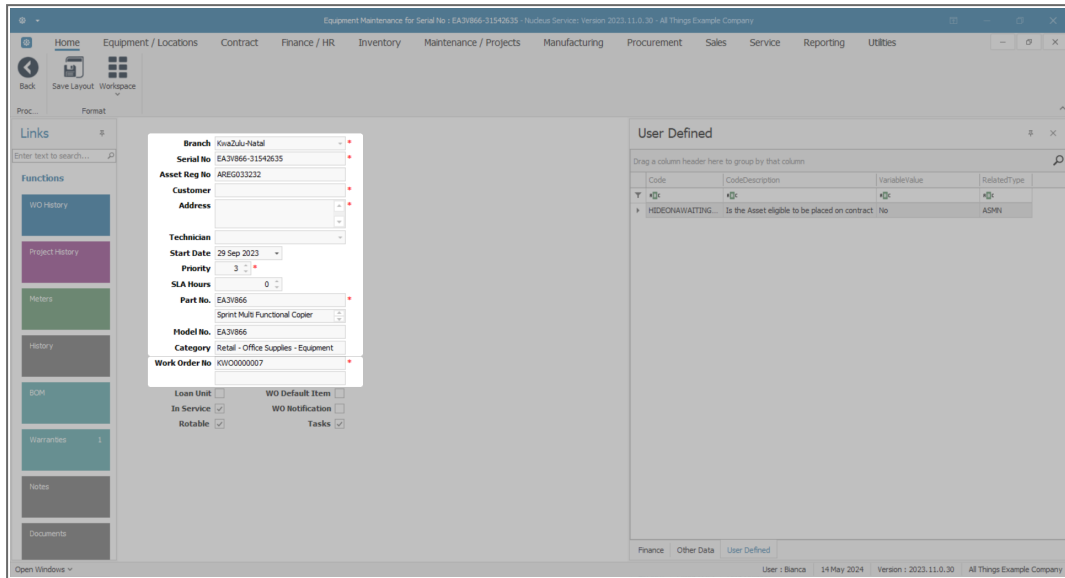
VIEW ASSET DETAILS

- All of the fields are the same as described above for Internal Asset - **WHSE**, except for the **Bin** and **Warehouse** fields.

WKOR-specific Fields

- These have been replaced with **Work Order No.**
 - **Work Order No:** This field will be populated with the work order number currently linked to the internal asset.
- For example, this internal asset might be out on **loan** to a customer whilst the customer machine is being repaired - the asset cannot be linked to the internal asset bin and warehouse fields or

the contract no and customer name fields as this is a temporary loan machine.



Equipment Maintenance for Serial No : EA31966-31542635 - Account Service: version 2023.11.0.30 - All Things Example Company

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

Back Save Layout Workspace

Proc... Format

Links

Enter text to search...

Functions

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

Branch: KwaZulu-Natal

Serial No: EA31966-31542635

Asset Reg No: AREG033232

Customer:

Address:

Technician:

Start Date: 29 Sep 2023

Priority: 3

SLA Hours: 0

Part No: EA31966

Model No: EA31966

Category: Retail - Office Supplies - Equipment

Work Order No: KWOC000007

Loan Unit: WO Default Item:

In Service: WO Notification:

Rotable: Tasks:

User Defined

Drag a column header here to group by that column

Code	CodeDescription	VariableValue	RelatedType
HIDEONWAITING	Is the Asset eligible to be placed on contract	No	ASN

Finance Other Data User Defined

User : Bianca 14 May 2024 version : 2023.11.0.30 All Things Example Company

All Internal Assets no matter which Parent Type they are linked to, display the following:

ASSET DETAILS CHECK BOXES

- **Loan Unit:** Select this check box if this is a loan machine to be issued and sent out to a client whilst their machine is being repaired
- **In Service:** Select this check box to indicate whether this machine 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 BPO2.
- **Rotable:** Select this check box to indicate whether this machine 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 BPO2.

- **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 machine is linked to an automated/scheduled task set up. A work order notification will be sent out when the machine 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.



Work Order No: KVO0000007	
Loan Unit <input type="checkbox"/>	WO Default Item <input type="checkbox"/>
In Service <input checked="" type="checkbox"/>	WO Notification <input type="checkbox"/>
Rotable <input checked="" type="checkbox"/>	Tasks <input checked="" type="checkbox"/>

FINANCE FRAME

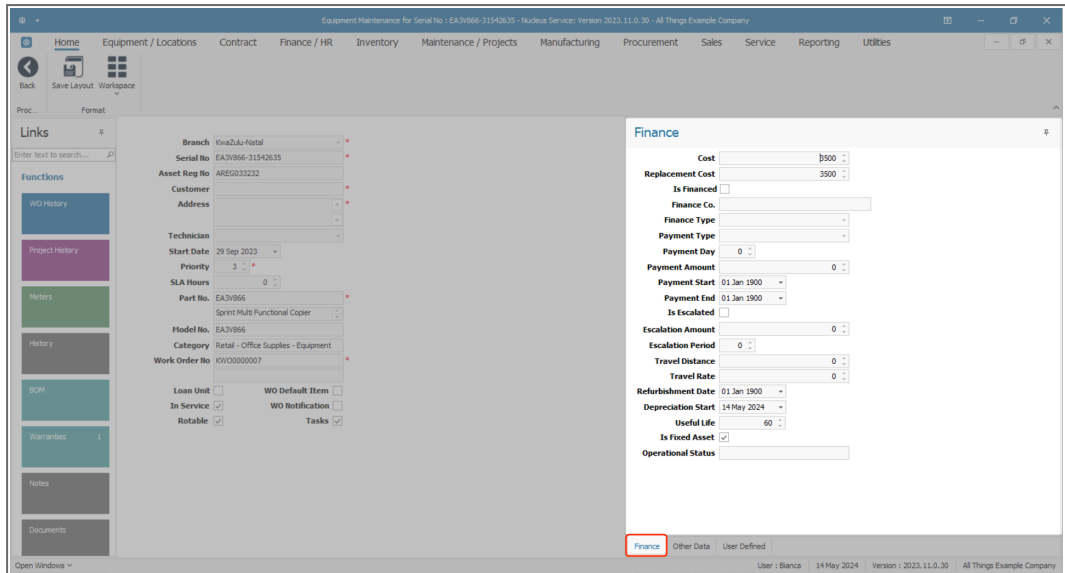
If the **Finance** frame is not already displayed, click on the **tab** to bring it to the fore.

The **Financial** details frame will be expanded. The population of these fields will depend on several factors:

- Whether the equipment item is **financed**.
- Whether a **depreciation method** has been applied to this equipment item.
- Whether an **escalation amount** and **period** have been applied to this equipment item.
- **Cost:** This is the purchase price of the item. Either type in or use the arrow indicators to enter the cost of the item.

- **Replacement Cost:** This is the cost of replacing the machine. Either type in or use the arrow indicators to enter the replacement cost of the item.
- **Is Financed:** This field shows whether a third party has provided funds for this item e.g. the item has been financed by a bank. Click on this check box if this item is financed by a third party (this would also apply to a [client owned asset](#)).
- **Finance Co.:** Click on the drop-down arrow and select the finance company supplying finance/funds for this item, if applicable.
- **Finance Type:** This field shows what finance type has been provided for this item. Click on the drop-down arrow and select the finance type e.g. Hire Purchase, Lease Agreement, Rental Agreement.
- **Payment Type:** Click on the drop-down arrow and select the payment type e.g. Debit Order, Cheque, Bank Transfer.
- **Payment Day:** Either type in or use the arrow indicators to enter the day of the month (e.g. 25th) that this payment will be made.
- **Payment Amount:** Either type in or use the arrow indicators to enter the payment amount that is to be paid monthly.
- **Payment Start:** Either type in or click on the drop-down arrow and use the **calendar** function to select the payment start date.
- **Payment End:** Either type in or click on the drop-down arrow and use the **calendar** function to select the payment end date.
- **Is Escalated:** Click on this check box if this payment amount is to be escalated after a period of time. (e.g. a 10% increment yearly.)
- **Escalation Amount:** Either type in or use the arrow indicators to enter by how much the repayment amount will increase.
- **Escalation Period:** Either type in or use the arrow indicators to enter the time period (e.g. the month) after which this payment amount will be escalated.

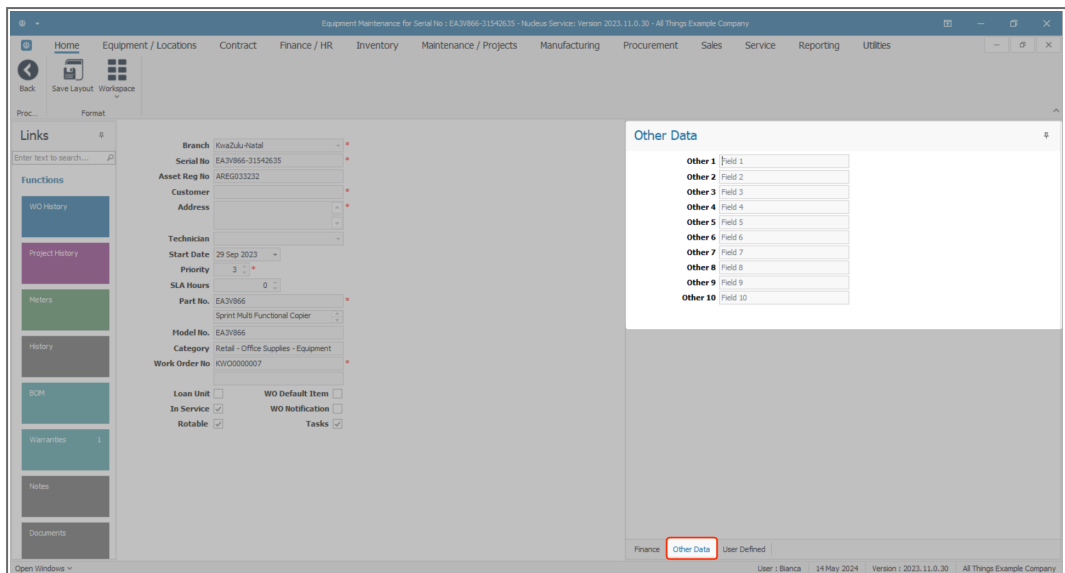
- **Travel Distance:** Type in the total travel distance in kilometres, if you want the system to include travel on all call invoices raised.
- **Travel Rate:** Type in the travel rate if using Travel Distance.
- **Refurbishment Date:** Either type in or click on the drop-down arrow and use the calendar function to select the date when the item is to receive an overhaul and/or repair.
- **Depreciation Start:** Depreciation is a measure of how much an item drops in value each year. Either type in or click on the drop-down arrow and use the calendar function to select the date when the depreciation of the item will start.
- **Useful Life:** This is the estimated lifespan of a depreciable item - how many years it is likely to remain in service. This is important from an accounting perspective, where the usefulness of a machine is calculated before it gets written off, e.g. 5 years. Type in the number of months that the item will be in condition before it is considered a write off. This field is affected by [depreciation](#), if it is enabled.
- **Is Fixed Asset:** This check box will be auto-ticked as this is an internal asset.
- **Operational Status:** Here you have the ability to add information or comments about anything related to the machine e.g. machine passed Useful Life, or may be stripped for parts or may still be useful for short term loan out. This function provides information about the suitability of the item for operation. Type in whether the item is operational or not and why, if required.



OTHER DATA FRAME

- Click on the **Other Data** tab to bring this frame to the fore.
- There are **10** fields in this screen that can be utilised for additional information that you would like to log against an internal asset.
 - **Note 1:** These field labels can be **re-named** to suit your company requirements).
 - **Note 2:** As this is the view only screen you cannot add or edit the fields from here. Information can be added via the [Add](#) or [Edit](#) buttons in the **Machine List for []** screen.

For more information refer to [Other Data](#).



USER DEFINED FRAME

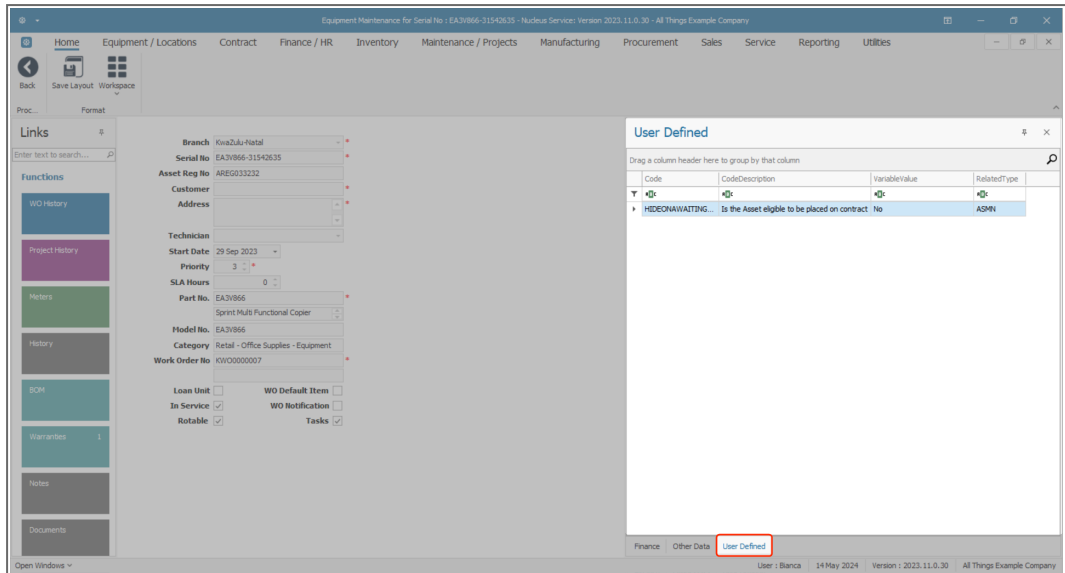
- Click on the **User Defined** tab to bring this frame to the fore.

At present, these fields in the **Equipment - Assets** module can be used to add extra information relevant to the selected asset.

- The added custom fields will reflect in the User Defined panel in the Asset Maintain screen across all assets on the system.
- However, the **Variable Values** selected for each User Defined field will be unique to the selected asset.

This information will also reflect in the **Call Maintain** screen where the asset is linked. Although the fields can be viewed from the Call Maintain screen, the actual information can only be edited in the Asset Maintain screen.

For more information refer to [Add](#) or [Edit](#) User Defined.



The screenshot displays the 'Equipment Maintenance' interface for a specific asset. The main panel shows the following details:

- Branch: KwaZulu-Natal
- Serial No: EA31966-31542635
- Asset Reg No: AREG033232
- Customer: [Redacted]
- Address: [Redacted]
- Technician: [Redacted]
- Start Date: 29 Sep 2023
- Priority: 3
- SLA Hours: 0
- Part No: EA31966
- Model No: EA31966
- Category: Retail - Office Supplies - Equipment
- Work Order No: KW0000007
- Loan Unit:
- WO Default Item:
- In Service:
- WO Notification:
- Rotable:
- Tasks:

The 'User Defined' table is visible in the bottom right corner:

Code	CodeDescription	VariableValue	RelatedType
HIDEONAWAITING...	Is the Asset eligible to be placed on contract	No	ASMN

At the bottom of the interface, the 'User Defined' tab is highlighted with a red box. The status bar at the bottom indicates: User: Bianca, 14 May 2024, Version: 2023.11.0.30, All Things Example Company.

Related Topics

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

MNU.007.038

