

EQUIPMENT

ASSETS - ADD - FINANCE DETAILS

Once the customer asset details have been added, you can follow the process below to add the customer asset **finance** details.

ASSET LISTING SCREEN

Ribbon Select **Equipment and Locations > Assets**



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

PartCode	SerialNo	ModelNo	Description	Department	StartDate	Status	CategoryDesc	InProdAsset	ParentType	Asset	UsefulLife	InFinance	PaymentTy...	SupplierNo...	FinanceTy...	PaymentDay
A300	A300-38296751	A300	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
A500T	A500T-81227762	A500T	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
A9653	A9653-02594423	A9653	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
A990	A990-79910907	A990	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
AV5588	AV5588-89487269	AV5588	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
BP1478	BP1478-58075119	BP1478	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
B29332	B29332-84039403	B29332	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
C8800	C8800-84555546	C8800	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
CD7732	CD7732-88637847	CD7732	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
CT3690	CT3690-83617863	CT3690	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
D08Y29	D08Y29-61955854	D08Y29	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
D86547	D86547-91142229	D86547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
D549F00	D549F00-17183313	D549F00	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
EA3V96A	EA3V96A-68464448	EA3V96A	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
EC7536	EC7536-69835409	EC7536	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
EE0258	EE0258-91209854	EE0258	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
EV1P559	EV1P559-90097518	EV1P559	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
F9314	F9314-84354603	F9314	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
F88328	F88328-77528111	F88328	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
F88328	F88328-80428055	F88328	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Q6547	Q6547-05971345	Q6547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Q84564	Q84564-37265793	Q84564	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
H1475P	H1475P-11445157	H1475P	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
HV1591	HV1591-10708704	HV1591	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
IF9685	IF9685-39952956	IF9685	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
QJ7537	QJ7537-49188181	QJ7537	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
K3500	K3500-80705850	K3500	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
KP0323	KP0323-40271894	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.

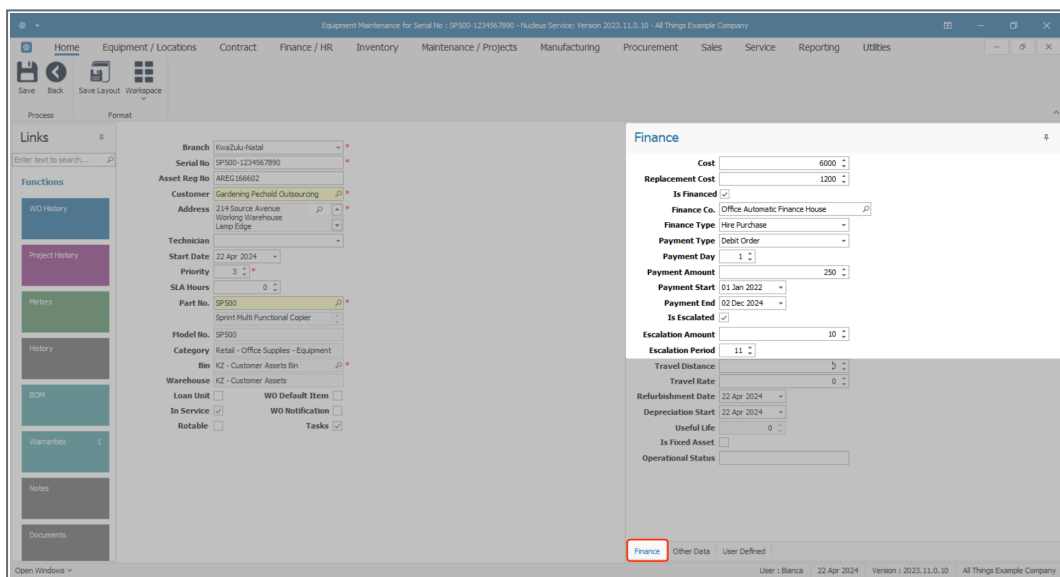
Follow the process to [add the customer asset details](#).

- Once the required details have been added, move across to the **Finance** frame.

ADD FINANCE FRAME DETAILS

- Complete the finance details, as applicable.
- **Cost:** Either type in or use the arrow indicators to enter the cost of the customer machine. This is the current value of the customer machine.
- **Replacement Cost:** Either type in or use the arrow indicators to enter the replacement cost of the customer machine. This is the amount of money required to replace whatever is damaged or destroyed at today's cost.
- **Is Financed:** Click on this check box if this customer machine is financed by a finance house.
- **Finance Co:** Click on the drop-down arrow and select the finance company supplying finance for this machine, if applicable.
- **Finance Type:** 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, that is used to pay the finance house monthly.

- **Payment Day:** Either type in or use the arrow indicators to enter the day of the month 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.
- **Escalation Amount:** Either type in or use the arrow indicators to enter the escalation amount.
- **Escalation Period:** Either type in or use the arrow indicators to enter the time after which this payment amount will be escalated.

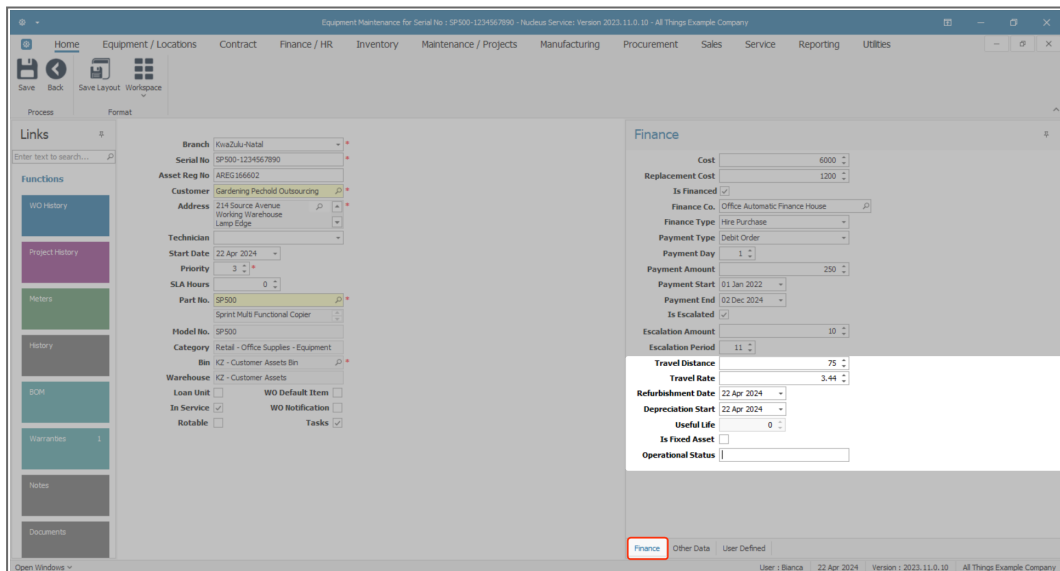


The screenshot displays the 'Finance' details for an asset. The central area shows asset information such as Branch (KwaZulu-Natal), Serial No (SP500-1234567890), Asset Reg No (AREG166602), Customer (Gardening Pechold Outsourcing), Address (214 Source Avenue, Working Warehouse, Lamp Edge), Technician, Start Date (22 Apr 2024), Priority (3), SLA Hours (0), Part No (SP500), Model No (SP500), Category (Retail - Office Supplies - Equipment), Bin (K2 - Customer Assets Bin), Warehouse (K2 - Customer Assets), Loan Unit (WO Default Item), In Service (checked), WO Notification (unchecked), Rotable (unchecked), and Tasks (checked). The right-hand 'Finance' panel includes the following fields:

- Cost: 6000
- Replacement Cost: 1200
- Is Financed:
- Finance Co.: Office Automatic Finance House
- Finance Type: Hire Purchase
- Payment Type: Debit Order
- Payment Day: 1
- Payment Amount: 250
- Payment Start: 01 Jan 2022
- Payment End: 02 Dec 2024
- Is Escalated:
- Escalation Amount: 10
- Escalation Period: 11
- Travel Distance: 0
- Travel Rate: 0
- Refurbishment Date: 22 Apr 2024
- Depreciation Start: 22 Apr 2024
- Useful Life: 0
- Is Fixed Asset:
- Operational Status: [Empty]

- **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:** Set the date at which this asset should be due for refurbishment, if applicable.

- **Depreciation Start:** Set the date from which this item will start depreciating.
- **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 an asset is calculated before it gets written off, e.g. 5 years. Type in the number of months that the asset will be in condition before it is considered a write off. This field is affected by depreciation if it is enabled. As this is a customer asset, this field does not apply.
- **Is Fixed Asset:** As this is a customer asset, this check box should remain un-ticked. This flag is only ever used by the system when converting a serialised stock item to an internal asset.
- **Operational Status:** Here you can add information or comments about anything related to this customer asset 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 asset for operation. Type in whether the asset is operational or not and why, if required.



The screenshot displays the 'Finance' details for an asset. The central area shows the following information:

- Branch: KwaZulu Natal
- Serial No: SP500-1234567890
- Asset Reg No: AREC166602
- Customer: Gardening Refresh Outsourcing
- Address: 214 Source Avenue, Working Warehouse, Limp Edge
- Technician: [Empty]
- Start Date: 22 Apr 2024
- Priority: 3
- SLA Hours: 0
- Part No: SP500 (Sprint Multi Functional Copier)
- Model No: SP500
- Category: Retail - Office Supplies - Equipment
- Bin: KZ - Customer Assets Bin
- Warehouse: KZ - Customer Assets
- Loan Unit: WO Default Item:
- In Service: WO Notification:
- Rotable: Tasks:

The right-hand 'Finance' panel contains the following fields:

- Cost: 6000
- Replacement Cost: 1200
- Is Financed:
- Finance Co.: Office Automatic Finance House
- Finance Type: Hire Purchase
- Payment Type: Debit Order
- Payment Day: 1
- Payment Amount: 250
- Payment Start: 01 Jan 2022
- Payment End: 02 Dec 2024
- Is Escalated:
- Escalation Amount: 10
- Escalation Period: 11
- Travel Distance: 75
- Travel Rate: 3.44
- Refurbishment Date: 22 Apr 2024
- Depreciation Start: 22 Apr 2024
- Useful Life: 0
- Is Fixed Asset:
- Operational Status: [Empty text box]

SAVE CUSTOMER ASSET

1. When you have finished updating the customer asset details and **finance** details, you can

Either follow the processes to:

2. Add the asset Other Data and
3. Add the asset User Defined fields, if required,

Or

4. Click on **Save**.

- 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	DepName	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	WHGE	No	0	No	
Sprint Multi Functional Copier	SP2020	SP2020-82352587	SP2020			29 Sep 2023	A	Retail - Office	No	WHGE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-14993572	SP2020			29 Sep 2023	A	Retail - Office	No	WHGE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-86999138	SP2020			29 Sep 2023	A	Retail - Office	No	WHGE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-86999138	SP2020			29 Sep 2023	A	Retail - Office	No	WHGE	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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