

EQUIPMENT

ASSETS - EDIT - FINANCE DETAILS

The **finance details** relating to a selected asset may need to be updated during the lifespan of the asset. If your company has security rights configured then you may not be able to edit some, or even all, of these finance details.

Follow the process below to **edit** the **Finance** panel information.

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	DefnUseCase	ParentType	Asset	UsefulLife	Finance	PaymentTy...	SupplierNo...	FinanceFy...	PaymentDay
Sprint Multi Functional Copier	A300	A300-38296751	A300	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A500T	A500T-81227762	A500T	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A9653	A9653-92554423	A9653	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A990	A990-79910907	A990	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	AV5588	AV5588-99487269	AV5588	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	BP1470	BP1470-58075119	BP1470	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	B29352	B29352-84039483	B29352	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	C8000	C8000-84552546	C8000	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CD7732	CD7732-88637847	CD7732	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CT3690	CT3690-83617867	CT3690	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D08Y29	D08Y29-61955854	D08Y29	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	DR6547	DR6547-91142229	DR6547	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D54F600	D54F600-17186313	D54F6...	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EA3V986	EA3V986-56849448	EA3V986	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EE0258	EE0258-91208854	EE0258	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EV1P559	EV1P559-90097518	EV1P559	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F9014	F9014-84354603	F9014	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F88528	F88528-77528811	F88528	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	FW8520	FW8520-80124205	FW8520	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GL6547	GL6547-65971345	GL6547	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GW4564	GW4564-27057593	GW4564	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	H1475P	H1475P-11445157	H1475P	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	HV1591	HV1591-10708704	HV1591	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	JP9685	JP9685-39952956	JP9685	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	JQ7537	JQ7537-49118181	JQ7537	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	K3500	K3500-09718569	K3500	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	KP0323	KP0323-40271894	KP0323	Gardening Peckhold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL	No	CTRT	No	0	No				1

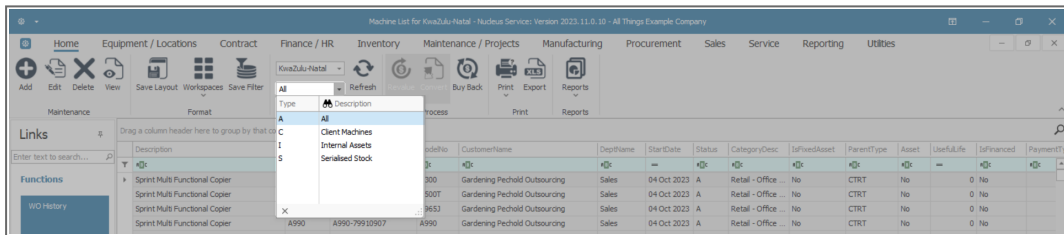
Select the Site

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.

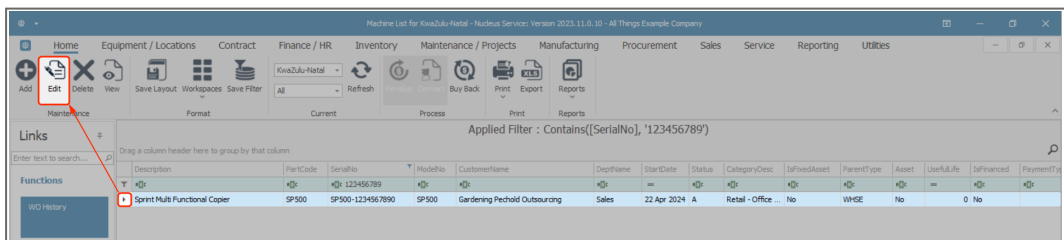
If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

- By default, this screen will open with the **Type** filter set to 'All' , listing all of the assets on the system (Customer Assets, Internal Assets and Serialised Stock Items).
- You can click on the **drop-down arrow** in the **Type** field and select an alternative Type, (such as Client Machines), if required.

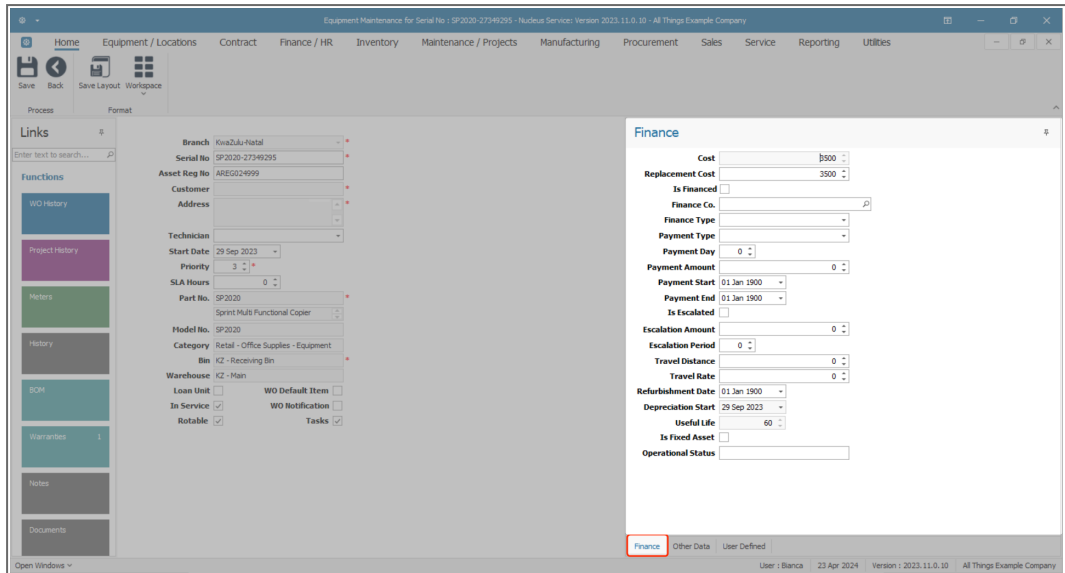


SELECT ASSET TO EDIT

- Select the **row** of the **asset** you wish to **edit**.
- Click on **Edit**.



- The **Equipment Maintenance for Serial no: []** screen will open.
- If the Finance frame is not already open, click on the **Finance** tab.



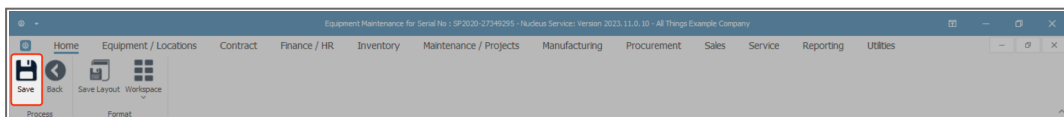
You can edit the fields in the following ways:

- **highlight** and **type over** the original text with new information
- **backspace over** and **type in** the new information
- **add** new information to the text currently in the field.
- Note that the following fields are 'greyed out' and cannot be edited:
 - **Cost**
 - **Depreciation Start**
 - **Useful Life**
- **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.

SAVE EDITED FINANCE DETAILS

- When you finished editing the Finance details, as required, 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	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	
Sprint Multi Functional Copier	SP2020	SP2020-568790188	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	

Related Topics

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

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