

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.

					Machine List for KwaZulu-Natal		ice: Version		.0.10 - All Thing	gs Example Co	mpany									
Home	Equipment / Locations Cor	itract F	inance / HR I	nventory	Maintenance / Project	s Manu	facturing	Р	rocurement	Sales	Service	ł	Reporting	Utiliti	es			-	8	
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unctions	Sprint Multi Functional Copier	A300	A300-38296751	A300	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No				1		
WO History	Sprint Multi Functional Copier Sprint Multi Functional Copier	A500T A9653	A500T-81227702 A965J-02554423	A500T A965J	Gardening Pechold Outsourcing Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi Retail - Offi		CTRT	No No		No				1		
	Sprint Multi Functional Copier Sprint Multi Functional Copier	A965J	A990-79910907	A990	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No				1		
	Sprint Multi Functional Copier	AV5588	AV5588-99487269	AV5588	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No				1		
Project History	Sprint Multi Functional Copier	BP1470	BP1470-58075119	BP1470	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No				1		
	Sprint Multi Functional Copier	BZ9352	829352-84039403	BZ9352	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No						
Meters	Sprint Multi Functional Copier	C9800	C9800-84555546	C9800	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No						
	Sprint Multi Functional Copier	CD7T52	CD7T52-98637847	CD7T52	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No				1		
	Sprint Multi Functional Copier	CT3690	CT3690-83617863	CT3690	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No				1		
History	Sprint Multi Functional Copier	DD8Y29	DD8Y29-61955854	DD8Y29	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi		CTRT	No		No				1		
	Sprint Multi Functional Copier	DR6547	DR6547-91142229	DR6547	Gardening Pechold Outsourcing	Sales	04 Oct 2		Retail - Offi	No	CTRT	No	0	No				1		
BOM	Sprint Multi Functional Copier	DS4JF600	DS4JF600-17186313	DS4JF6	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
BOM	Sprint Multi Functional Copier	EA3V866	EA3V866-56846448	EA3V866	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	EC7536	EC7536-69835409	EC7536	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
Warranties	Sprint Multi Functional Copier	EE0258	EE0258-91209854	EE0258	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	EV1P559	EV1P559-90097518	EV1P559	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	F9314	F9314-84354603	F9314	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
Notes	Sprint Multi Functional Copier	F88528	F88528-77522811	FB8528	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	FW8520	FW8520-80142055	FW8520	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
A	Sprint Multi Functional Copier	GL6547	GL6547-65971345	GL6547	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
Documents	Sprint Multi Functional Copier	GN4564	GN4564-37265793	GN4564	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	H14TSP	H14TSP-11445157	H14TSP	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
Maintenance	Sprint Multi Functional Copier	HV1591	HV1591-10708704	HV1591	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	IF9685	IF9685-39952956	IF9685	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	JQ7537	JQ7537-49188181	JQ7537	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
Depreciation	Sprint Multi Functional Copier	K3500	K3500-09716569	K3500	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		
	Sprint Multi Functional Copier	KP0323	KP0323-40271894	KP0323	Gardening Pechold Outsourcing	Sales	04 Oct 2	A	Retail - Offi	No	CTRT	No	0	No				1		

Select the Site

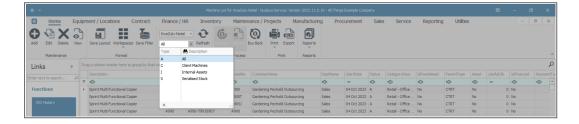


Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

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 <u>all</u> 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**.

Home	Equipment / Locations Contract	Finance / HF	Inventory	Mainter	ance / Projects	Manufacturing	Procureme	nt Sal	es Service	Reporting) Utilities			- [øX
Add Edit Delete	View Save Layout Workspaces Save Filter	KwaZulu-Natal	Refresh		🔞 🖷 🖬	ort Reports									
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ter text to search	Description	PartCode	SerialNo	▼ ModelNo	CustomerName	Dept	Name StartD	te Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UsefulLife	IsFinanced	Payment
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- The Equipment Maintenance for Serial no: [] screen will open.
- If the Finance frame is not already open, click on the **Finance** tab.



Equipment Maintenance for Serial No : SP2020-27349295 - Nucleus Service: Version 2023.11.0.10 - All Things Example Company	e – a ×
B Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reportir	ng Utilities – 🖉 🗙
Sive Back SaveLayout Workspace	
Process Format	
Links * Finance Finance	7
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Functions Asset Reg No ARE0024999 Replacement Cost 350	0 0
Customer "Is Financed _	
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In Service V W0 Notification Depreciation Start 29 Sep 2023 - Rotable V Tasks V Useful Life 50	
Rotable V Tasks V Useful Life 60	
Operational Status	
Notes	
Documents	
France Other Data User Defined	
	Apr 2024 Version : 2023.11.0.10 All Things Example Company

You can edit the fields in the following ways:

- **highlight** and **type over** the original text with new information
- ^o backspace over and type in the new information
- $^\circ~$ 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.

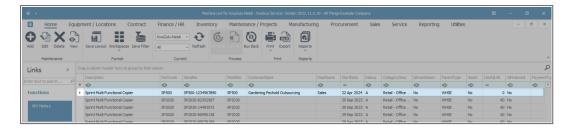
SAVE EDITED FINANCE DETAILS

• 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.



Related Topics

- Assets Edit Asset Details
- Assets Edit Finance Details
- Assets Edit Other Data
- Assets Edit User Defined

MNU.007.045