

# **EQUIPMENT**

# **INTRODUCTION TO ASSETS**

In Nucleus Service an asset can be:

- 1. An **Internal Asset**: This is an item that would be owned by a company and can be used as a device to generate revenue through rental. This will have been a serialised stock item that has been **converted into an asset** prior to rental.
- 2. A Customer (Client) Asset: This is where a customer has purchased a serialised stock item and is currently the owner of said item.

Note:

- A serialised stock item is <u>not</u> an asset, it is an item in store, ready to be sold, without a rental or service agreement. It only becomes an asset when converted from a stock item. Once an item is sold (and invoiced), Nucleus Serivce will 'move' it into the Customer Asset Warehouse, ready to attach a contract to it, if necessary, for servicing.
- The Nucleus **Asset Listing** screen contains a data grid of all type of items; Client Machines, Internal Assets and Serialised Stock but the latter are not actually 'assets' until the above-mentioned conversion.

Criteria for an asset would be:

- i. A **unique** serial number
- ii. Scheduled task planning
- iii. Traceability (movement history, etc.)
- iv. Contract Items

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### **ASSET LISTING SCREEN**

#### Ribbon Select Equipment and Locations > Assets



• The Machine Listing screen will be displayed.

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### 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.

#### The Asset Type Filter



By default, the **Asset Type** or filter in this screen is set to view **All** serialised items.

- Click on the **drop-down arrow** to view the Status filter menu:
  - Client Machines: View serialised items that belong to customers.
  - Internal Assets: View serialised items that belong to the company, e.g. internal rental machines
  - Serialised Stock: View serialised items in stock ready for sale.
- In this image the status has been kept as All.

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## **ASSETS ACTION BUTTONS**

### MAINTENANCE

From this screen, you can:

- Add an Asset
- Edit an Asset
- Delete an Asset
- <u>View</u> an Asset:
  - View Client Machine
  - View Internal Asset
  - View Serialised Stock Item





### PROCESS

- <u>Revalue</u> an Asset
- Convert an Asset
- Buy Back an Asset



### PRINT

- The following **Asset Reports** can be printed from this screen:
  - Depreciation Report
  - Depreciation Summary
  - Period Depreciation
  - Equipment Listing
  - Asset Register
  - Move History
  - Scan History
  - Equipment Detail
  - Service History

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### **ASSET FUNCTIONS TILES**

On the left side of the **Machine List for** [] screen is the **Links** panel which contains the Asset **Functions** and **Processing** tiles. Each tile, when clicked on, will take you to further information concerning the selected asset.

**Important Note:** When working from the **Asset Listing** (Machine List for Site) screen, ensure that you have selected the correct asset <u>before</u> you click on any tile.

WO History	The <b>WO History</b> tile will direct you to the Work Orders for								
	machine screen, where you can Add, Edit, Delete, View,								
	Close, and Complete a work order linked to the asset.								
Project History	The <b>Project History</b> tile will direct you to the <b>Project List</b> -								
	ing for equipment screen, where you can Add, Edit, Apply a								
	Project Methodology or Adjust Project Baseline, as well as								
	maintain Employee and Project Time.								
Meters	The <b>Meters</b> tile will direct you to the Meter Listing for								
	Serial No. screen, where you can Add, Delete or Reset a								
	meter reading linked to the asset.								
History	The <b>History</b> tile will direct you to the <u>Transaction History</u>								
	for Equipment screen, where you can view a history trail of								
	the Valuation, Transactions and Movement of an asset.								
вом	The <b>BOM</b> tile will direct you to the <b>BOM Listing for equip</b> -								
	ment screen, where you can Add, Delete and View BOMs								
	linked to the asset.								
Warranties	The <b>Warranties</b> tile will direct you to the <u>Warranties for</u>								
	Equipment screen, where you can Add, Edit and View war-								
	ranties, and Warranty Claims linked to the asset.								
Notes	The <b>Notes</b> tile will direct you to the <u>Note Listing for Serial</u>								
	No. screen, where you can Add a note linked to the asset.								



Documents

The **Documents** tile will direct you to the <u>Documents for</u> <u>Equipment</u> screen, where you can Add, Edit and Delete digital documents linked to the asset.

The **Maintenance** tile will direct you to the <u>Maintenance</u> <u>Methodology for Asset</u> screen., where you can Add, Edit and Delete maintenance methodologies linked to the asset.

Depreciation

The **Depreciation** tile will direct you to the <u>Asset Depre</u>-<u>ciation</u> screen, where you can View the current period and depreciation date.

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