

We are currently updating our site; thank you for your patience.

EQUIPMENT

ASSETS – CONVERT STOCK TO ASSET

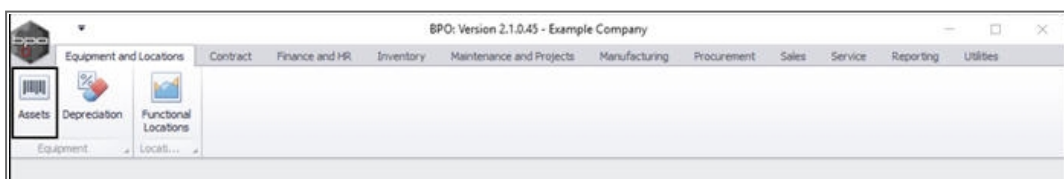
Stock v Asset: An asset is any serialised, non-stock item.

Convert Stock to Asset will set the stock item to an asset. This means that the item will be creating a revenue, for example, a machine for rental purposes.

[Convert Asset to Stock](#) will set the serialised item to a stock item. This means that the item will be sold without a rental or service agreement, for example, a machine for sales purposes.

If your company configuration is set up with an **Asset Warehouse** then the item will automatically be transferred there when the stock is converted. If your company does not have an Asset Warehouse set up then a **receiving warehouse** and **bin** must be selected.

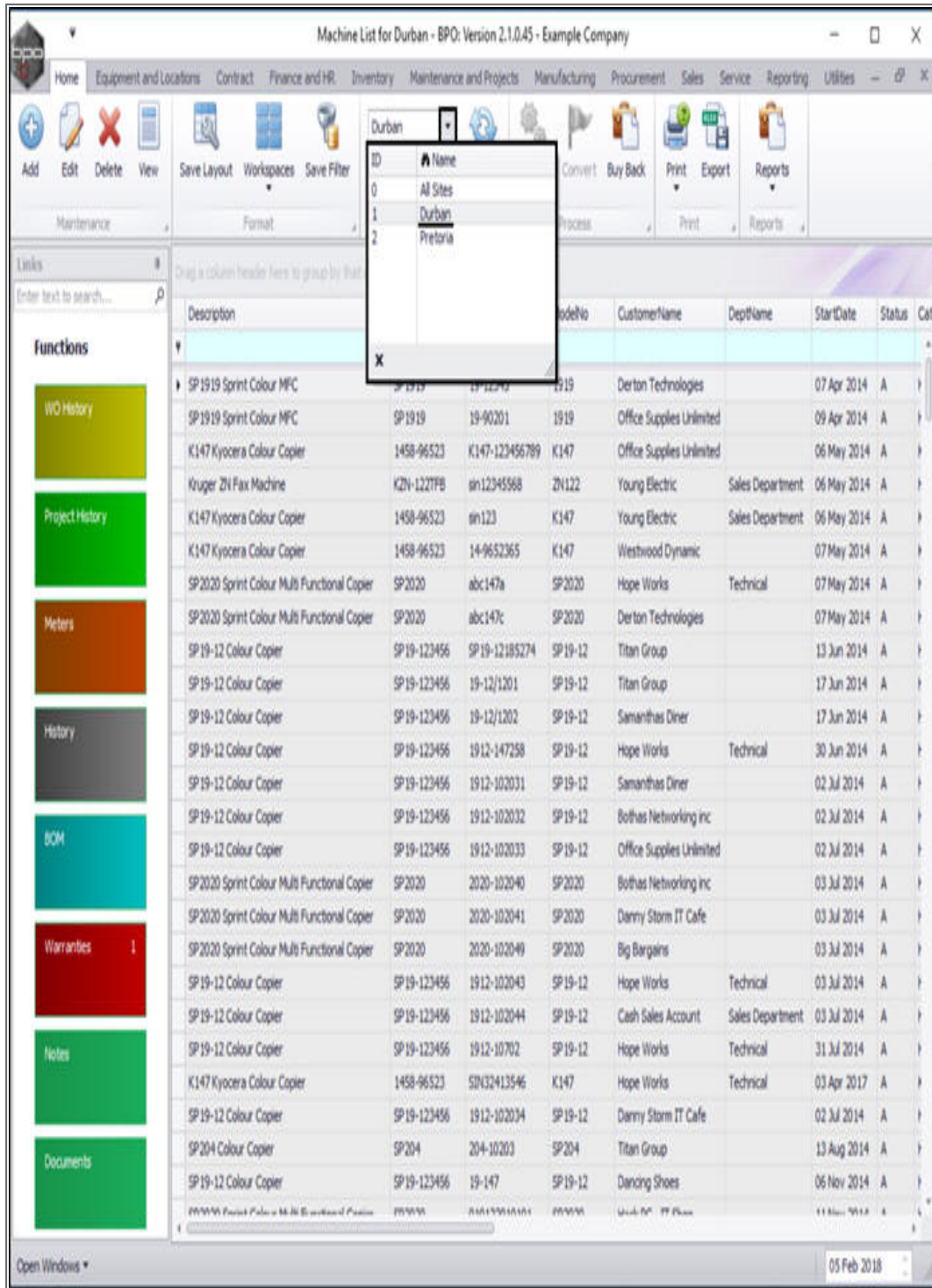
Ribbon Access: Equipment and Locations > Assets



The **Machine Listing for []** screen will be displayed.

SELECT THE SITE AND STATUS

- Select the **site**.
 - In this image **Durban** has been selected.



- Select the **status**.
 - This must be set to **Serialised Stock**.

The screenshot shows the 'Machine List for Durban' application window. The 'Serialised Stock' dropdown menu is open, displaying the following options:

- All
- Client Machines
- Internal Assets
- Serialised Stock (highlighted)

The main table displays a list of assets with the following columns: Description, delNo, CustomerName, DeptName, Status, CategoryDesc, Asset, and IsFixedAsset. The table contains multiple rows of data, including various copiers and drums.

SELECT ASSET TO BE CONVERTED

Either,

- Select the **row** of the **serialised item** that you wish to convert from stock to an asset.

Important Note: The selected serialised item must be in the **stock warehouse** and not attached to a work order or linked to a contract. You will not be able to convert it if it is attached to a work order or linked to a contract.

- Click on **Convert**.

Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

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

Add | Edit | Delete | View | Save Layout | Workspaces | Save Filter | Durban | Serialised Stock | Refresh | Revalue | **Convert** | Buy Back | Print | Export | Reports

Links: Enter text to search...

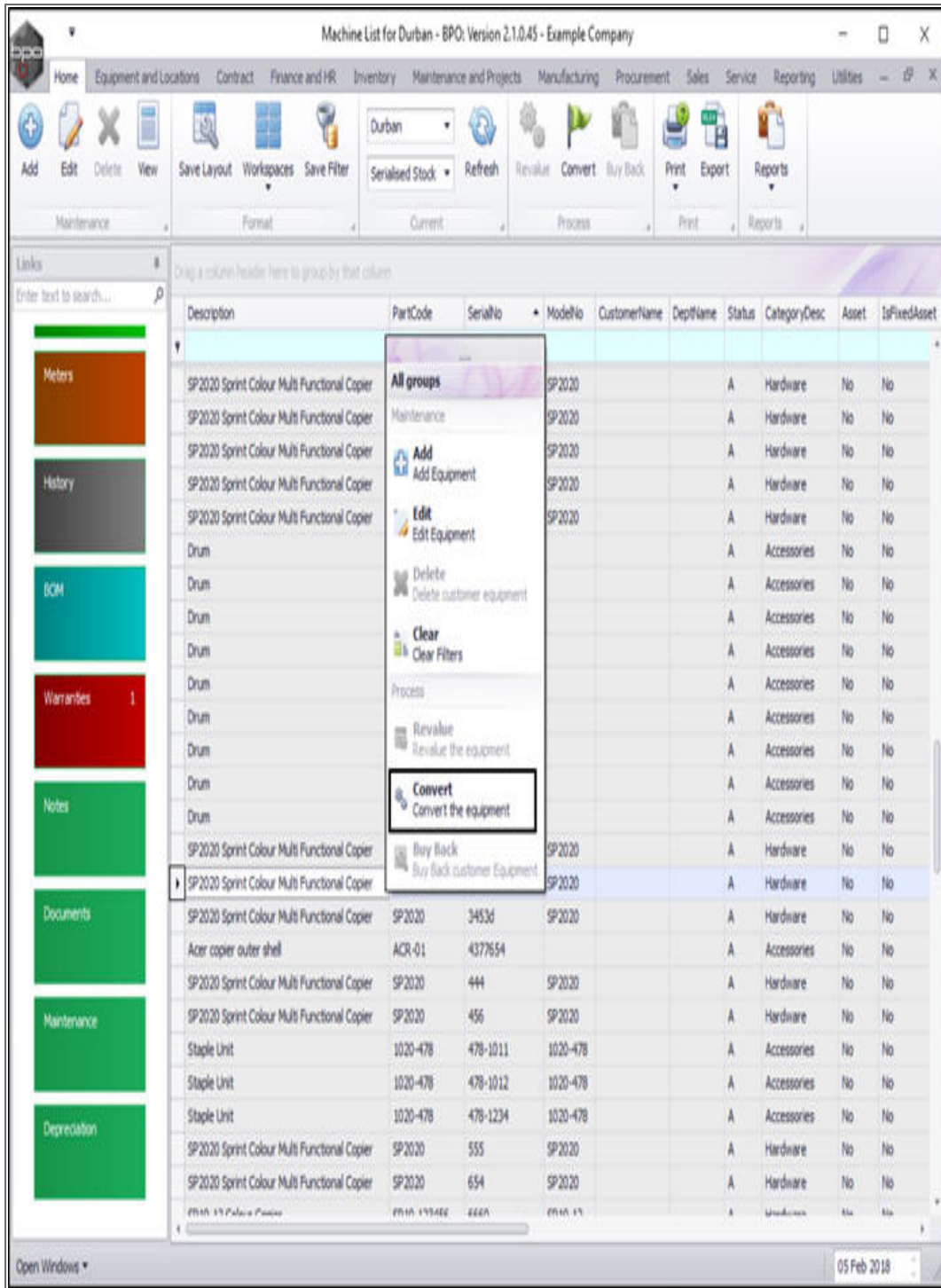
Functions: WO History, Project History, Meters, History, DOM, Warranties, Notes, Documents

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102047	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103054	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103055	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103057	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103058	SP2020			A	Hardware	No	No
Drum	2020-856	2020-11111				A	Accessories	No	No
Drum	2020-856	2020-3425				A	Accessories	No	No
Drum	2020-856	2020-6537				A	Accessories	No	No
Drum	2020-856	2020-6589				A	Accessories	No	No
Drum	2020-856	2020-7564				A	Accessories	No	No
Drum	2020-856	2020-8749				A	Accessories	No	No
Drum	2020-856	2020-9085				A	Accessories	No	No
Drum	2020-856	2020-9675				A	Accessories	No	No
Drum	2020-856	2020-9765				A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-9999	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	333	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	3453d	SP2020			A	Hardware	No	No
Acer copier outer shell	ACR-01	4377654				A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	444	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	456	SP2020			A	Hardware	No	No
Staple Unit	1020-478	478-1011	1020-478			A	Accessories	No	No
Staple Unit	1020-478	478-1012	1020-478			A	Accessories	No	No
Staple Unit	1020-478	478-1234	1020-478			A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	654	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	666	SP2020			A	Hardware	No	No

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Or,

- **Right click** anywhere in the **row** of the **serialised item** that you wish to convert from stock to an asset.
- A **Maintenance** menu will pop up.
- Click on the **Convert - Convert the equipment** option.



- An **Equipment Conversion** message box will appear with the following prompt:

- Are you sure you want to convert serial number []?
- Click on **Yes**.

The screenshot shows the 'Machine List for Durban - BPO: Version 2.1.0.45 - Example Company' application. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, and a dropdown menu for 'Serialized Stock' with options like Refresh, Revalue, Convert, Buy Back, Print, Export, and Reports.

The main area displays a table with the following columns: Description, PartCode, SerialNo, ModelNo, CustomerName, DepName, Status, CategoryDesc, Asset, and IsFixedAsset. The table lists various items, including 'SP2020 Sprint Colour Multi Functional Copier' and 'Drum' accessories. A confirmation dialog box titled 'Equipment Conversion' is overlaid on the table, asking 'Are you sure you want to convert serial number 333?' with 'Yes' and 'No' buttons.

Description	PartCode	SerialNo	ModelNo	CustomerName	DepName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102047	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103054	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103055	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103057	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103058	SP2020			A	Hardware	No	No
Drum	2020-856	2020-1111				A	Accessories	No	No
Drum	2020-856	2020-3425				A	Accessories	No	No
Drum	2020-856	2020-6537				A	Accessories	No	No
Drum	2020-856	2020-6589				A	Accessories	No	No
Drum	2020-856	2020-7564				A	Accessories	No	No
Drum	2020-856	2020-8749				A	Accessories	No	No
Drum	2020-856	2020-9085				A	Accessories	No	No
Drum	2020-856	2020-9675				A	Accessories	No	No
Drum	2020-856	2020-9765				A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-9999	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	333	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier						A	Hardware	No	No
Acer copier outer shell						A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier						A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier						A	Hardware	No	No
Staple Unit						A	Accessories	No	No
Staple Unit						A	Accessories	No	No
Staple Unit						A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	654	SP2020			A	Hardware	No	No

ASSET TRANSACTION DETAILS

A **Transfer Information for serial no. []** screen will pop up.

- **Transaction Date:** This will populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Transfer Notes:** Type in a reason for this item transfer.

Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

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

Add Edit Delete View Save Layout Workspaces Save Filter

Durban Serialised Stock Refresh Revalue Convert Buy Back Print Export Reports

Maintenance Format Current Process Print Reports

Links

Enter text to search...

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier								No	No
SP2020 Sprint Colour Multi Functional Copier								No	No
SP2020 Sprint Colour Multi Functional Copier								No	No
SP2020 Sprint Colour Multi Functional Copier								No	No
SP2020 Sprint Colour Multi Functional Copier								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
Drum								No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	333	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	3453d	SP2020		A	Hardware		No	No
Acer copier outer shell	ACR-01	4377654			A	Accessories		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	444	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	456	SP2020		A	Hardware		No	No
Staple Unit	1020-478	478-1011	1020-478		A	Accessories		No	No
Staple Unit	1020-478	478-1012	1020-478		A	Accessories		No	No
Staple Unit	1020-478	478-1234	1020-478		A	Accessories		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	654	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	666	SP2020		A	Hardware		No	No

Transfer information for serial no. 333

Home

Ok Cancel

Process

Transaction Date: 05 Feb 2018

Transfer Notes

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SAVE ASSET CONVERSION

- When you have finished adding the transfer date and note information, click on **Save**.

The screenshot shows the 'Machine List for Durban - BPO: Version 2.1.0.45 - Example Company' window. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, and a dropdown menu for 'Durban'. The main area displays a table of assets with columns: Description, PartCode, SerialNo, ModelNo, CustomerName, DeptName, Status, CategoryDesc, Asset, and IsFixedAsset. A dialog box titled 'Transfer information for serial no. 333.' is open, showing a 'Transaction Date' of '06 Feb 2018' and 'Transfer Notes' containing 'Rental Contract'. The dialog has 'Ok' and 'Cancel' buttons. The table below the dialog shows various assets, including 'SP2020 Sprint Colour Multi Functional Copier' and 'Acer copier outer shell'.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier	SP2020	333	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	3453d	SP2020		A	Hardware		No	No
Acer copier outer shell	ACR-01	4377654			A	Accessories		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	444	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	456	SP2020		A	Hardware		No	No
Staple Unit	1020-478	478-1011	1020-478		A	Accessories		No	No
Staple Unit	1020-478	478-1012	1020-478		A	Accessories		No	No
Staple Unit	1020-478	478-1234	1020-478		A	Accessories		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	654	SP2020		A	Hardware		No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	666	SP2020		A	Hardware		No	No

PRINT CONVERSION TRANSFER NOTE

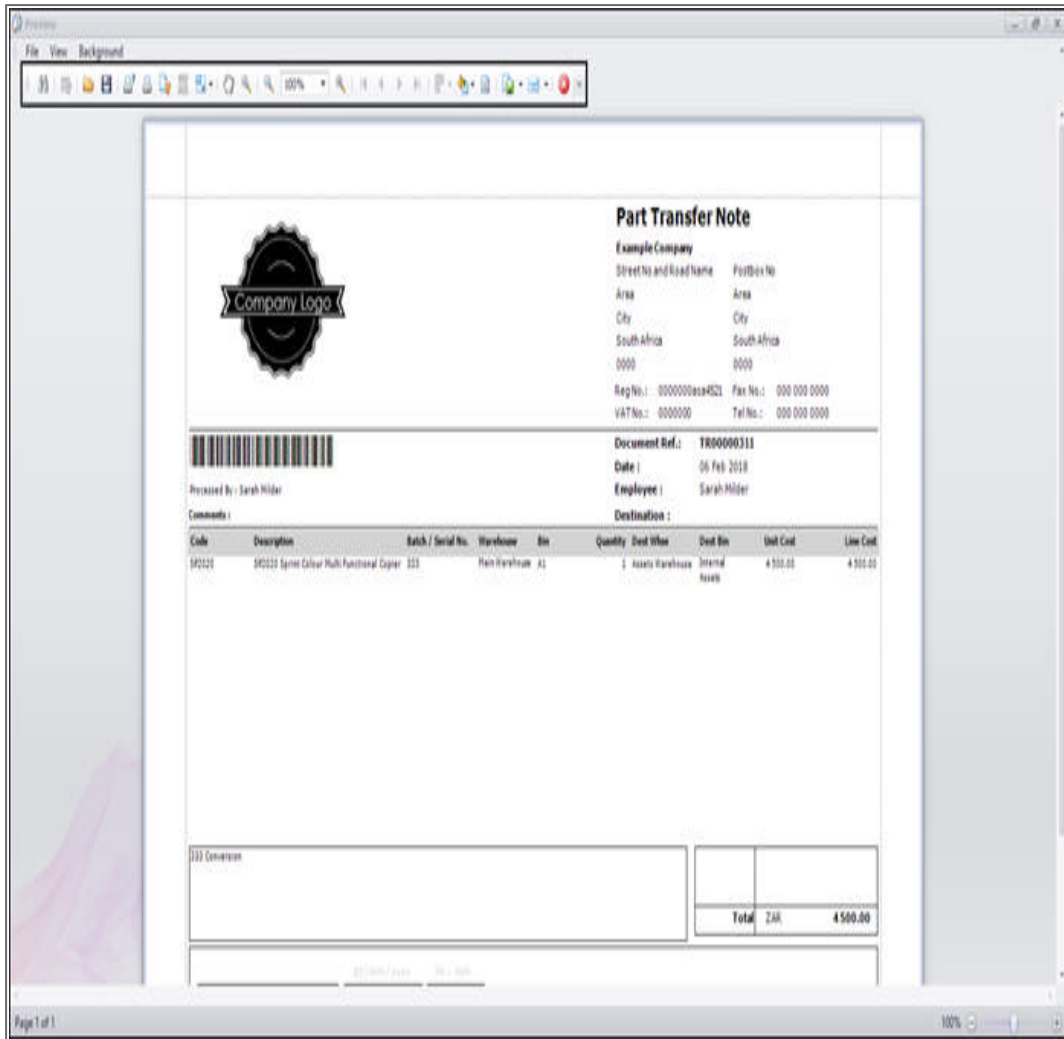
- A **View Transfer** message box will appear with the following prompt:
 - The Stock transfer, doc number [] has been created successfully. Do you wish to print the Transfer Note?
- Click on **Yes**.
- Or, click on **No** to miss out the next manual step.

The screenshot shows the 'Machine List for Durban - BPO: Version 2.1.0.45 - Example Company' window. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, and a dropdown menu for 'Durban'. The main area displays a table of machine assets with columns for Description, PartCode, SerialNo, ModelNo, CustomerName, DeptName, Status, CategoryDesc, Asset, and IsFixedAsset. A dialog box titled 'View transfer' is overlaid on the table, displaying a question: 'The Stock transfer, doc number TR00000311, has been created successfully. Do you wish to print the Transfer Note?' with 'Yes' and 'No' buttons.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102047	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103054	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103055	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103057	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103058	SP2020			A	Hardware	No	No
Drum	2020-856	2020-1111				A	Accessories	No	No
Drum	2020-856	2020-3425				A	Accessories	No	No
Drum	2020-856	2020-6537				A	Accessories	No	No
Drum	2020-856	2020-6589				A	Accessories	No	No
Drum	2020-856	2020-7564				A	Accessories	No	No
Drum	2020-856	2020-8749				A	Accessories	No	No
Drum	2020-856	2020-9085				A	Accessories	No	No
Drum	2020-856	2020-9675				A	Accessories	No	No
Drum	2020-856	2020-9765				A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-9999	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	333	SP2020			A	Hardware	No	No
Acer copier outer shell							Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier							Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier							Hardware	No	No
Staple Unit							Accessories	No	No
Staple Unit							Accessories	No	No
Staple Unit							Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	654	SP2020			A	Hardware	No	No
2016 15 Polaris Printer	2016 1534EE	8888	2016 15			A	Unknown	No	No

- The **Part Transfer Note Preview** screen will be displayed.
- From here you can **Edit, Print, Email** or **Export** the document.

- **Close** the preview screen when you are finished.



- You will return to the **Machine List for []** screen where the selected serialised item has now been **removed** from this screen.

Machine List for Durban - BPO: Version 2.1.0.45 - Example Company

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

Add | Edit | Delete | View | Save Layout | Workspaces | Save Filter | Durban | Serialised Stock | Refresh | Revalue | Convert | Buy Back | Print | Export | Reports

Maintenance | Format | Current | Process | Print | Reports

Links: Enter text to search... Drag a column header here to group by that column

Functions: WO History, Project History, Meters, History, BOM, Warranties 1, Notes, Documents

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102047	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103054	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103055	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103057	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103058	SP2020			A	Hardware	No	No
Drum	2020-856	2020-1111				A	Accessories	No	No
Drum	2020-856	2020-3425				A	Accessories	No	No
Drum	2020-856	2020-6537				A	Accessories	No	No
Drum	2020-856	2020-6589				A	Accessories	No	No
Drum	2020-856	2020-7564				A	Accessories	No	No
Drum	2020-856	2020-8749				A	Accessories	No	No
Drum	2020-856	2020-9085				A	Accessories	No	No
Drum	2020-856	2020-9675				A	Accessories	No	No
Drum	2020-856	2020-9765				A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-9999	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	3453d	SP2020			A	Hardware	No	No
Acer copier outer shell	ACR-01	4377654				A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	444	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	456	SP2020			A	Hardware	No	No
Staple Unit	1020-478	478-1011	1020-478			A	Accessories	No	No
Staple Unit	1020-478	478-1012	1020-478			A	Accessories	No	No
Staple Unit	1020-478	478-1234	1020-478			A	Accessories	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	555	SP2020			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	654	SP2020			A	Hardware	No	No
SP19-12 Colour Copier	SP19-122456	6660	SP19-12			A	Hardware	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	777	SP2020			A	Hardware	No	No

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VIEW THE CONVERTED ASSET STATUS

- Select the **Internal Assets** status.

The screenshot shows the 'Machine List for Durban' application window. The 'Serialised Stock' dropdown menu is open, showing the following options:

- A All
- C Client Machines
- I Internal Assets** (highlighted)
- S Serialised Stock

The main table displays a list of assets with the following columns: Description, IdNo, CustomerName, DeptName, Status, CategoryDesc, Asset, and IsFixedAsset. The table contains several rows of data, including 'SP2020 Sprint Colour Multi Functional Copier' and 'Drum' items.

- You can now view the transferred item in the **Machine list for []** screen where the status is set to **Internal Assets**.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	CategoryDesc	Asset	IsFixedAsset
Drum	2020-856	2020-4327				A	Accessories	No	Yes
Drum	2020-856	2020-4329				A	Accessories	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-787878	SP2020	Apple Juice Inc	Sales De...	A	Hardware	No	Yes
Drum	2020-856	2020856-1234				A	Accessories	Yes	Yes
Sprint copier	SP1818	2020-9867LU				A	Hardware	Yes	Yes
SP1919 Sprint Colour MFC	SP1919	20-857485	1919			A	Hardware	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	321	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	333	SP2020			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	76589	SP2020			A	Hardware	No	Yes
SP19-12 Colour Copier	SP19-123456	7770	SP19-12			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	789	SP2020			A	Hardware	No	Yes
Drum	2020-856	856-1020				A	Accessories	Yes	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	987	SP2020	Hope Works	Technical	A	Hardware	No	Yes
Staple Unit	2020-998	998-987654				A	Accessories	No	Yes
SP19-12 Colour Copier	SP19-123456	9990	SP19-12			A	Hardware	Yes	Yes
Acer copier outer shell	ACR-01	abcd123				A	Accessories	No	Yes
SP1919 Sprint Colour MFC	SP1919	cvb123	1919			A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	lv1234	SP2020			A	Hardware	Yes	Yes
New Machine	NMACH	NM123654				A	Hardware	No	Yes
K147 Kyocera Colour Copier	1458-96523	58V13512345	K147			A	Kyocera Multi...	No	Yes
Test Machine	TMACH	T123				A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	test121212	SP2020	Hope Works	Technical	A	Hardware	No	Yes
SP2020 Sprint Colour Multi Functional Copier	SP2020	test1234	SP2020	Hope Works	Technical	A	Hardware	No	Yes
Test Machine	TMACH	test987654		Sananths Di...		A	Hardware	No	Yes
Test Machine	TMACH	tm40201				A	Hardware	No	Yes

MNU.011.004

