

EQUIPMENT

INTRODUCTION TO ASSETS

In BPO 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.

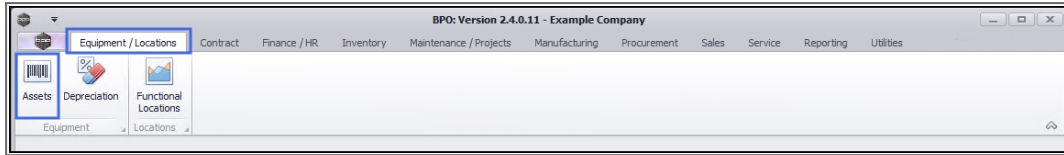
Note:

- A **serialised stock item** is not 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), BPO will 'move' it into the Customer Asset Warehouse, ready to attach a contract to it, if necessary, for servicing.
- The BPO **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**

Ribbon Access: *Equipment and Locations > Assets*



1. The Asset listing or **Machine List for [Site]** screen will be displayed.
2. The data grid will list all the serialised items currently on the system.
3. This screen will open with the **Site** filter set to your default site as configured on your User setup.

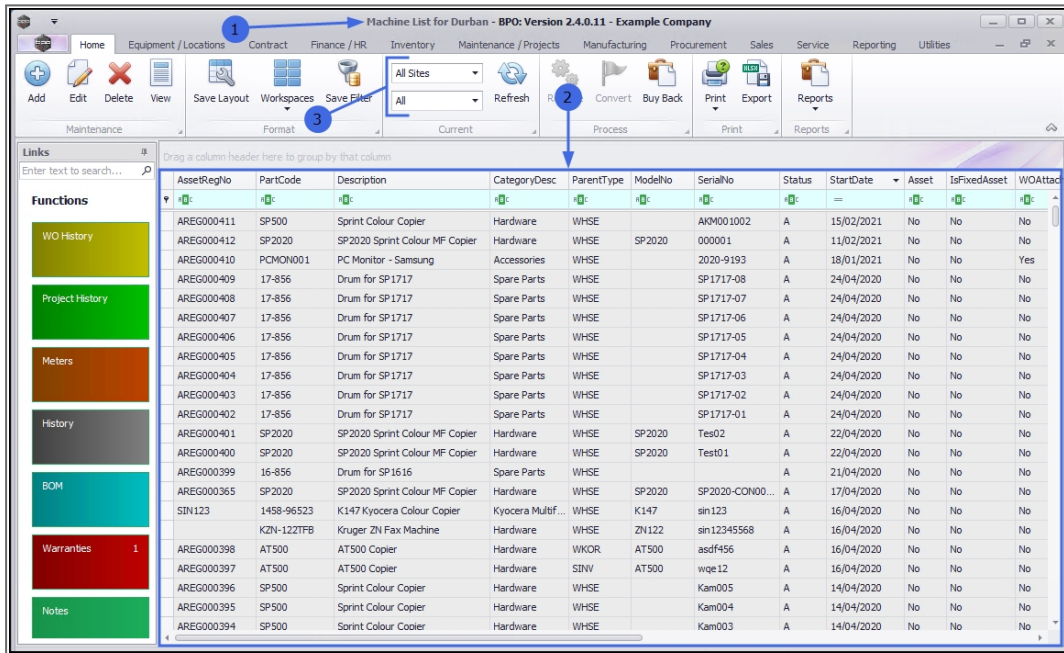


For a detailed handling of this topic refer to Site Selection.

The **Status** filter will be set to **All**.



For a detailed handling of this topic refer to State/Type Selection.

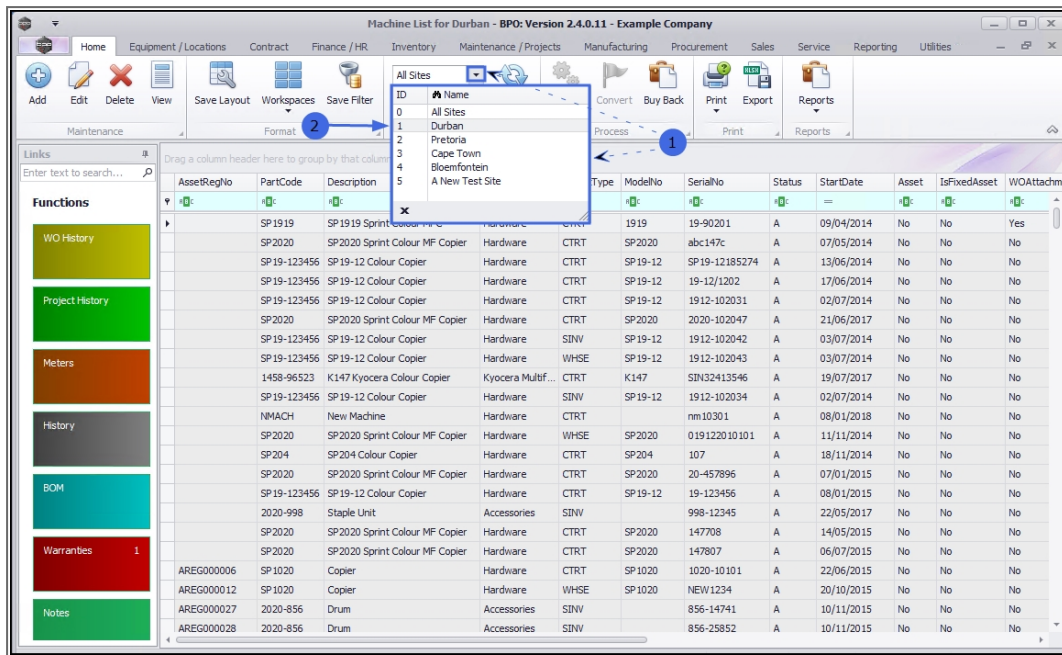


1. Click on the **drop-down arrow** to view the Site filter menu.



Selecting a specific Site will filter the data grid to display only the items linked to that Site.

2. In this image **Durban** has been selected.



THE ASSET TYPE FILTER

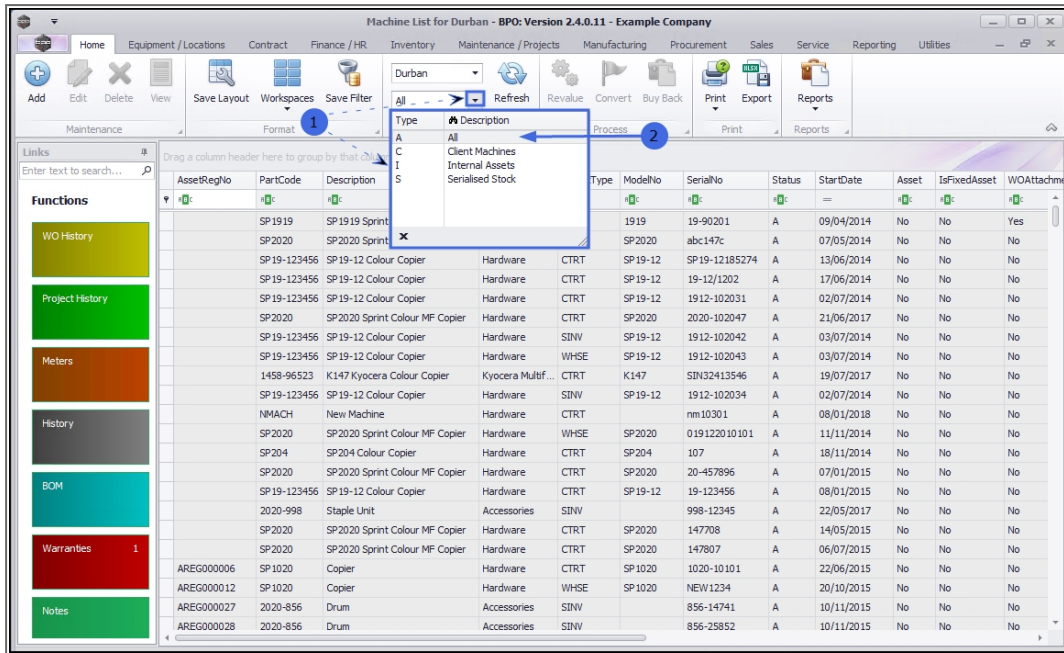
By default, the **Asset Type** or **Status** filter in this screen is set to view **All** serialised items.

- 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**.



Selecting a specific Status will filter the data grid to display only the items with that particular Status description.

2. In this image the status has been kept as **All**.



ASSETS ACTION BUTTONS

MAINTENANCE

From this screen, you can:

- [Add](#) an Asset
- [Edit](#) an Asset
- [Delete](#) an Asset
- [View](#) an Asset:
 - [View Client Machine](#)
 - [View Internal Asset](#)
 - [View Serialised Stock Item](#)

Machine List for Durban - BPO: Version 2.4.0.11 - Example Company

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

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

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

AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset	WOAttachm
SP1919	SP1919	Sprint Colour MFC	Hardware	CTRT	1919	19-90201	A	09/04/2014	No	No	Yes
SP2020	SP2020	Sprint Colour MF Copier	Hardware	CTRT	SP2020	abc147c	A	07/05/2014	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	CTRT	SP19-12	SP19-12185274	A	13/06/2014	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	CTRT	SP19-12	19-12/1202	A	17/06/2014	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	CTRT	SP19-12	1912-102031	A	02/07/2014	No	No	No
SP2020	SP2020	Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102047	A	21/06/2017	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	SINV	SP19-12	1912-102042	A	03/07/2014	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	WHSE	SP19-12	1912-102043	A	03/07/2014	No	No	No
1458-96523	K147	Kyocera Colour Copier	Kyocera Multif...	CTRT	K147	SIN32413546	A	19/07/2017	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	SINV	SP19-12	1912-102034	A	02/07/2014	No	No	No
NMACH		New Machine	Hardware	CTRT		nm10301	A	08/01/2018	No	No	No
SP2020	SP2020	Sprint Colour MF Copier	Hardware	WHSE	SP2020	019122010101	A	11/11/2014	No	No	No
SP204	SP204	Colour Copier	Hardware	CTRT	SP204	107	A	18/11/2014	No	No	No
SP2020	SP2020	Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-457896	A	07/01/2015	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	CTRT	SP19-12	19-123456	A	08/01/2015	No	No	No
2020-998		Staple Unit	Accessories	SINV		998-12345	A	22/05/2017	No	No	No
SP2020	SP2020	Sprint Colour MF Copier	Hardware	CTRT	SP2020	147708	A	14/05/2015	No	No	No
SP2020	SP2020	Sprint Colour MF Copier	Hardware	CTRT	SP2020	147807	A	06/07/2015	No	No	No
AREG000006	SP1020	Copier	Hardware	CTRT	SP1020	1020-10101	A	22/06/2015	No	No	No
AREG000012	SP1020	Copier	Hardware	WHSE	SP1020	NEW1234	A	20/10/2015	No	No	No
AREG000027	2020-856	Drum	Accessories	SINV		856-14741	A	10/11/2015	No	No	No
AREG000028	2020-856	Drum	Accessories	SINV		856-25852	A	10/11/2015	No	No	No

PROCESS

- [Revalue](#) an Asset
- [Convert](#) an Asset
- [Buy Back](#) an Asset

Machine List for Durban - BPO: Version 2.4.0.11 - Example Company

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

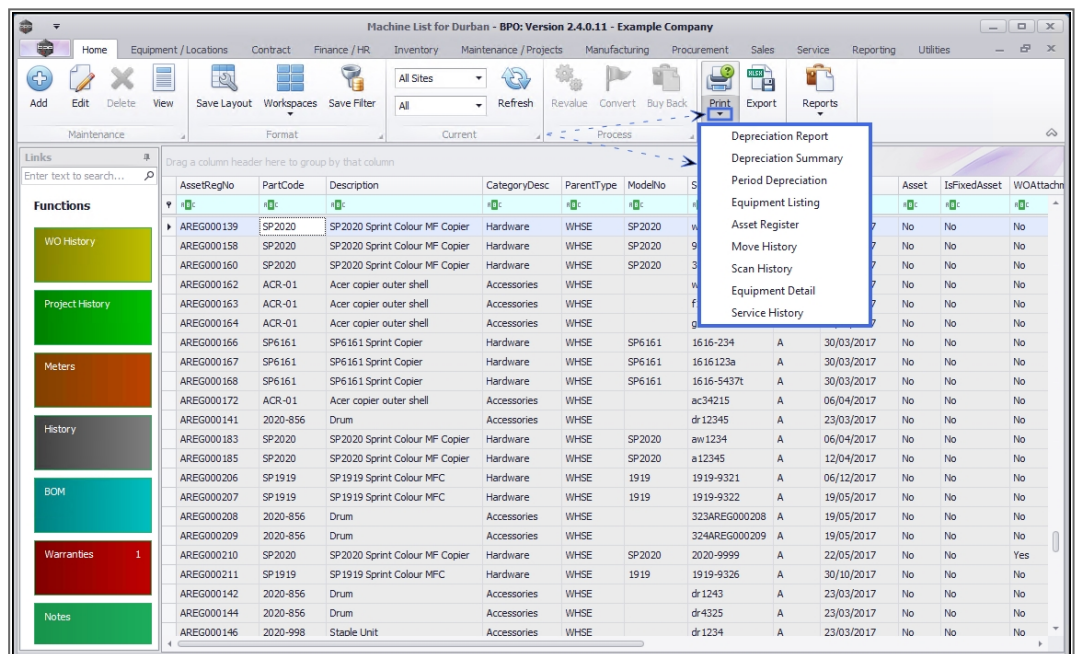
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SP204	SP204	Colour Copier	Hardware	CTRT	SP204	107	A	18/11/2014	No	No	No
SP2020	SP2020	Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-457896	A	07/01/2015	No	No	No
SP19-123456	SP19-12	Colour Copier	Hardware	CTRT	SP19-12	19-123456	A	08/01/2015	No	No	No
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SP2020	SP2020	Sprint Colour MF Copier	Hardware	CTRT	SP2020	147807	A	06/07/2015	No	No	No
AREG000006	SP1020	Copier	Hardware	CTRT	SP1020	1020-10101	A	22/06/2015	No	No	No
AREG000012	SP1020	Copier	Hardware	WHSE	SP1020	NEW1234	A	20/10/2015	No	No	No
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AREG000028	2020-856	Drum	Accessories	SINV		856-25852	A	10/11/2015	No	No	No

PRINT

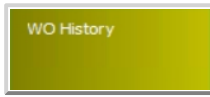
- The following **Asset Reports** can be printed from this screen:
 - [Depreciation Report](#)
 - [Depreciation Summary](#)
 - [Period Depreciation](#)
 - [Equipment Listing](#)
 - [Asset Register](#)
 - [Move History](#)
 - [Scan History](#)
 - [Equipment Detail](#)
 - [Service History](#)



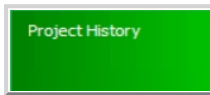
ASSET FUNCTIONS TILES

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.

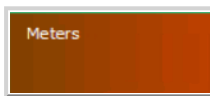
Important Note: When working from the **Asset Listing** (Machine List for Site) screen, ensure that you have selected the correct asset before you click on any tile.



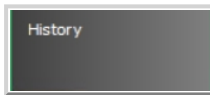
The **WO History** tile will direct you to the [Work Orders for machine](#) screen, where you can *Add, Edit, Delete, View, Close,* and *Complete* a work order linked to the asset.



The **Project History** tile will direct you to the [Project Listing for equipment](#) screen, where you can *Add, Edit, Apply a Project Methodology* or *Adjust Project Baseline*, as well as maintain *Employee* and *Project Time*.



The **Meters** 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.



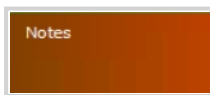
The **History** tile will direct you to the [Transaction History for Equipment](#) screen, where you can view a history trail of the *Valuation, Transactions* and *Movement* of an asset.



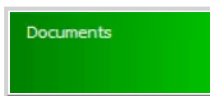
The **BOM** tile will direct you to the [BOM Listing for equipment](#) screen, where you can *Add, Delete* and *View* BOMs linked to the asset.



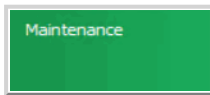
The **Warranties** tile will direct you to the [Warranties for Equipment](#) screen, where you can *Add, Edit* and *View* warranties, and *Warranty Claims* linked to the asset.



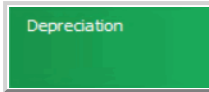
The **Notes** tile will direct you to the [Note Listing for Serial No.](#) screen, where you can *Add* a note linked to the asset.



The **Documents** tile will direct you to the [Documents for Equipment](#) screen, where you can *Add, Edit* and *Delete* digital documents linked to the asset.



The **Maintenance** tile will direct you to the [Maintenance Methodology for Asset](#) screen., where you can *Add, Edit* and *Delete* maintenance methodologies linked to the asset.



The **Depreciation** tile will direct you to the [Asset Depreciation](#) screen, where you can *View* the current period and depreciation date.

BPO.MNU.007