

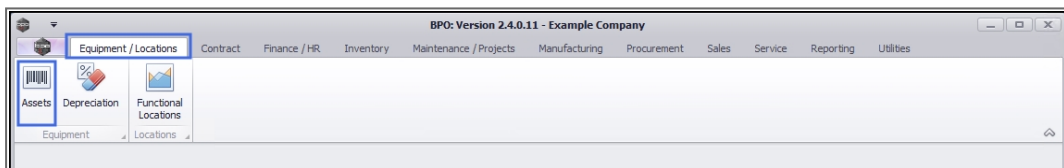
EQUIPMENT

ASSETS - ADD - ASSET DETAILS

A **Customer Asset** should only be added in this manner when a customer brings in a machine, for service or repair, that was bought elsewhere (this would be a [Client Owned Asset](#)).

In this process, we will navigate from the **Asset Listing** (*Machine List for []*) screen. A customer asset can also be [added from the Customer Listing](#) screen.

Ribbon Access: *Equipment and Locations* > *Assets*



1. The **Machine List for [Site]** screen will be displayed.

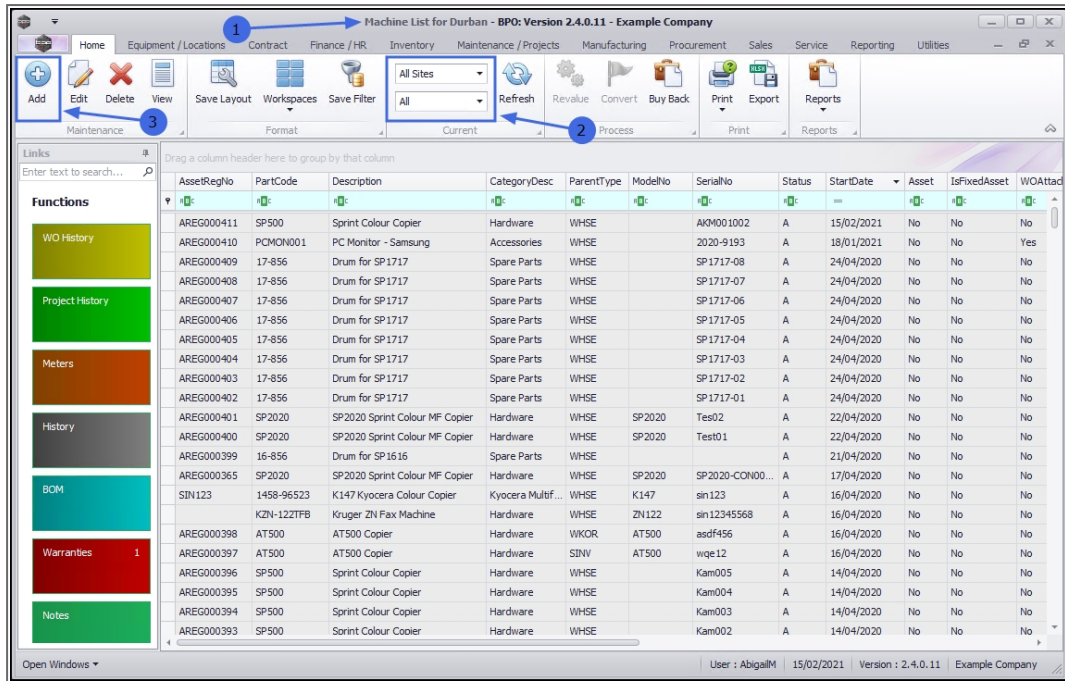
SELECT THE SITE AND STATUS

2. The screen will open with the default Site setting configured on the user.
 - The **Site** and **Status** do not need to be selected in this screen to continue this process.



Refer to [Site Selection](#) for more information.

3. Click on **Add**.

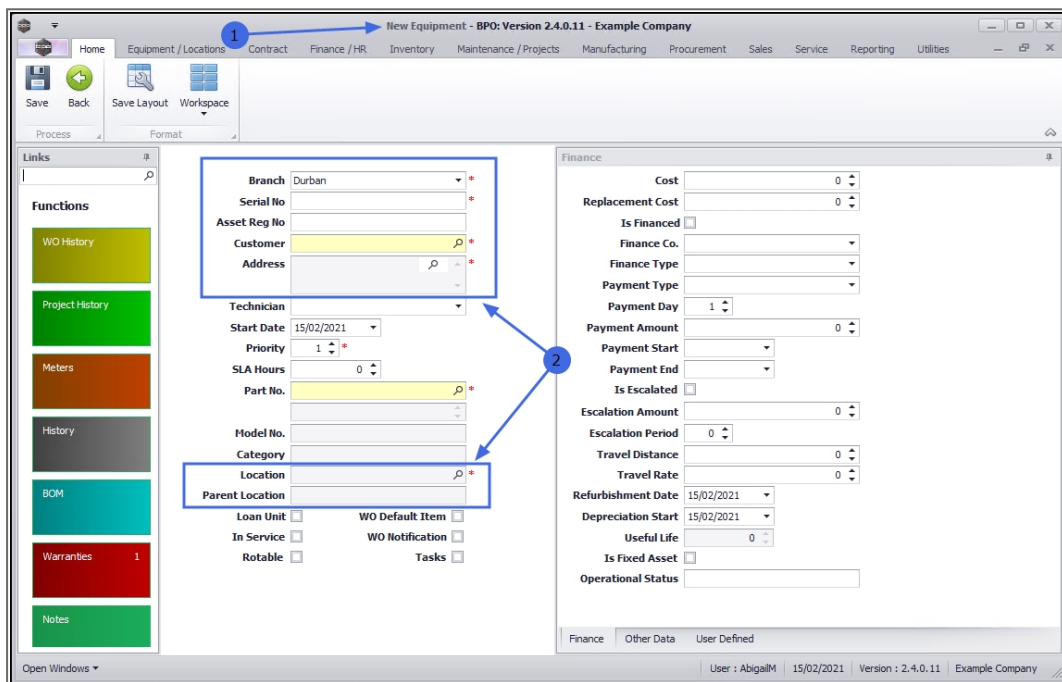


ADD CUSTOMER ASSET DETAILS

1. The **New Equipment** screen will open.
2. Add the customer asset *details*:
 - **Branch:** The branch or site the customer asset is to be linked to.
 - **Serial No.:** The serial no. of the customer asset.
 - **Asset Register No.:** Type in an alternative asset register number if required. (The asset register no. of the asset is different from the serial no.).
 - **Customer:** Click on the *search* button and select from the pop up screen, the name of the client that owns the asset. If the customer is not listed here then follow the process to [add a new customer](#).
 - **Address:** As you select the customer above:
 - **Location:** The *Select the Location...* screen will pop up as soon as the Customer and Address fields are populated. The

Customer Asset Warehouse bin will be auto selected in this pop-up screen. Click on Ok.

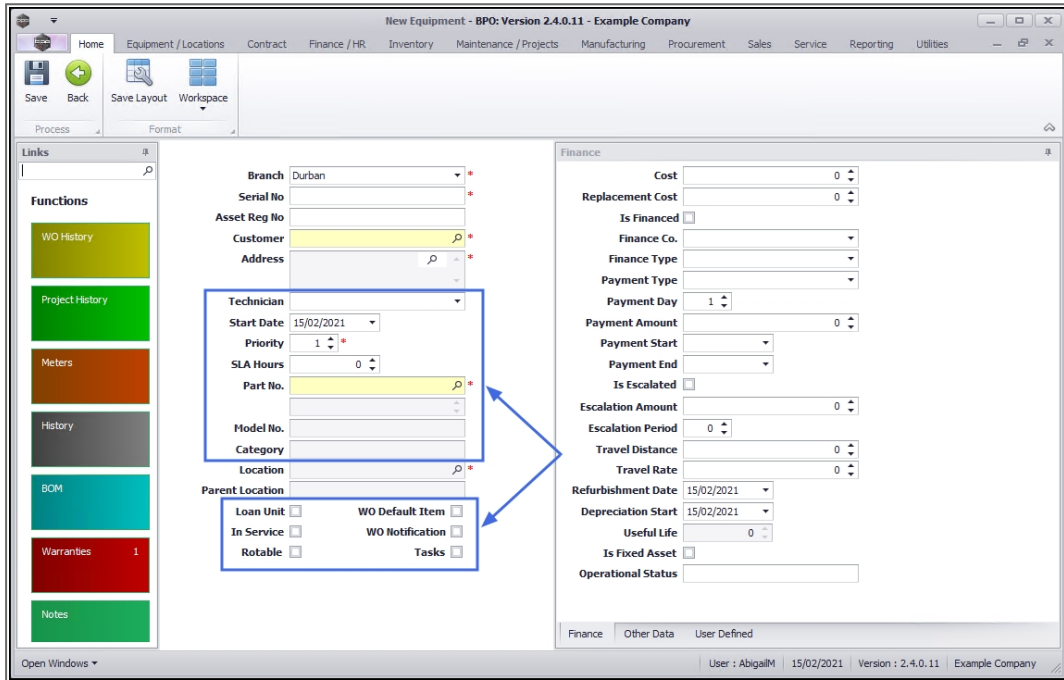
- **Parent Location:** This will auto populate with the warehouse linked to the bin location above.
 - This Address field will auto populate with the address linked to the customer - if there is only one address linked.
 - **Or a Select** screen will pop up with a list of addresses for this customer - if there is more than one address linked. Select from this list, the correct address.



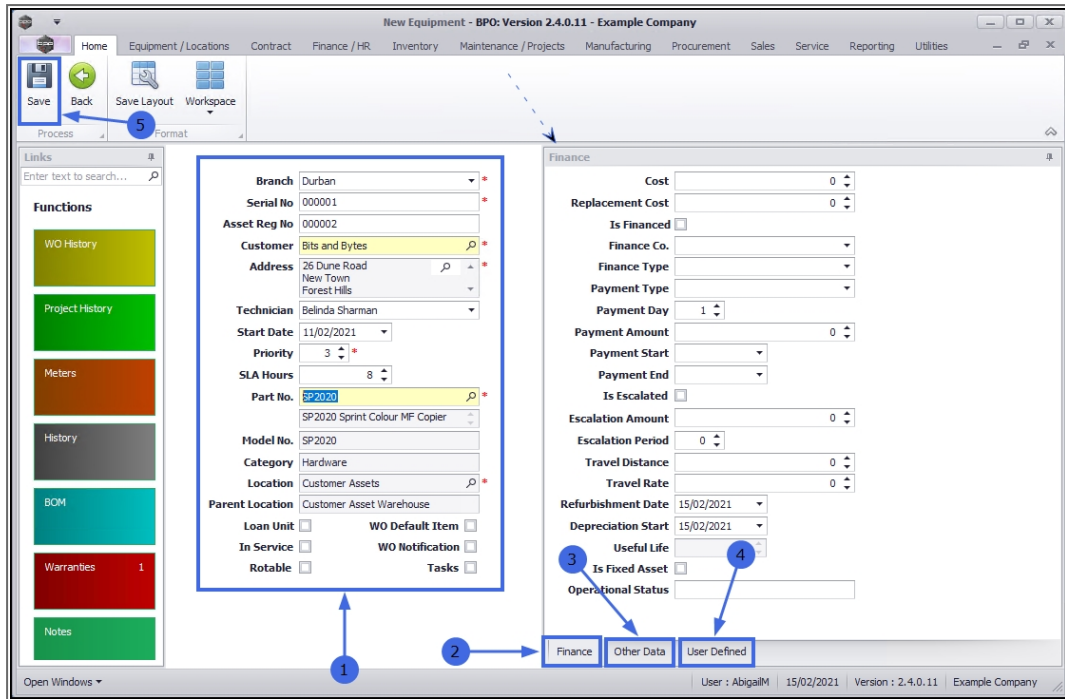
- **Technician:** Click on the drop-down arrow and link a specific employee to this customer asset, where required. (This will be marked as **'Is Default'** in the employee look-up when assigning a technician).
- **Start Date:** This will auto populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date, if required.

- **Priority:** Either type in or click on the arrow indicators and select an alternative priority number, if required. This is the work order priority of the customer machine service / repair. (1 = Most Important, 5 = Least Important).
- **SLA Hours:** Type in, or use the directional arrows to enter the [Service Level Agreement](#) response time to a call logged, in hours.
- **Part No. and Description:** Click on the **search** button and select from the pop-up screen, the number of the part to be linked as a customer asset. As this number is selected, the second field will populate with the description of the Part No.
- **Model No.:** This will display the model no. linked to the Part No. above, if applicable.
- **Category:** This will populate with the category linked to the part no. above e.g. Hardware.
- **Loan Unit:** As this is a customer machine and not a loan unit, this check box will remain un-ticked.
- **In Service:** Select this check box to indicate whether this asset falls within a Service Plan and needs to be periodically serviced. (Similar to a vehicle having a service plan.) *This functionality is not currently in use in BPO2.*
- **Rotable:** Select this check box to indicate whether this asset is included in a rotatable service plan. Rotable is a servicing method in which an already-repaired equipment item is exchanged for a failed equipment item, which in turn is repaired and kept for another exchange. *This functionality is not currently in use in BPO2.*
- **WO Default Item:** If this option is set in the company configuration, one machine per customer needs to be marked as the default (this machine will pull through automatically when a customer is selected on a new call).

- **WO Notification:** Select this check box to indicate whether this asset is linked to an automated/scheduled task set up. A work order notification will be sent out when the asset is due to be serviced.
- **Tasks:** This check box is related to the above and is linked to the Maintenance / Project screen. Refer to [Introduction to Tasks](#) for more information.



1. Once the customer asset details have been added, you can now follow the processes to:
2. Add the asset [Finance](#) details
3. Add the asset [Other Data](#) and
4. Add the asset [User Defined](#) fields, as required,
5. before **saving** the new customer asset.



VIEW ADDED CUSTOMER ASSET

1. You will return to the **Machine List for []** screen, where, if the status is set to **All** or **Client Machines**,
2. You will be able to view the added customer asset in the data grid.

AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset
AREG000412	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	000001	A	11/02/2021	No	No
AREG000410	PCMON001	PC Monitor - Samsung	Accessories	WHSE		2020-9193	A	18/01/2021	No	No
AREG000409	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-08	A	24/04/2020	No	No
AREG000408	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-07	A	24/04/2020	No	No
AREG000407	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-06	A	24/04/2020	No	No
AREG000406	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-05	A	24/04/2020	No	No
AREG000405	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-04	A	24/04/2020	No	No
AREG000404	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-03	A	24/04/2020	No	No
AREG000403	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-02	A	24/04/2020	No	No
AREG000402	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-01	A	24/04/2020	No	No
AREG000401	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	Tes02	A	22/04/2020	No	No
AREG000400	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	Test01	A	22/04/2020	No	No
AREG000399	16-856	Drum for SP1616	Spare Parts	WHSE			A	21/04/2020	No	No
AREG000365	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	SP2020-CON00...	A	17/04/2020	No	No
SIN123	1458-96523	K147 Kyocera Colour Copier	Kyocera Multif...	WHSE	K147	sin123	A	16/04/2020	No	No
	KZN-122TfB	Kruger ZN Fax Machine	Hardware	WHSE	ZN122	sin12345568	A	16/04/2020	No	No
AREG000398	AT500	AT500 Copier	Hardware	WKOR	AT500	asdf456	A	16/04/2020	No	No
AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wqe12	A	16/04/2020	No	No
AREG000396	SP500	Sprint Colour Copier	Hardware	WHSE		Kam005	A	14/04/2020	No	No
AREG000395	SP500	Sprint Colour Copier	Hardware	WHSE		Kam004	A	14/04/2020	No	No
AREG000394	SP500	Sprint Colour Copier	Hardware	WHSE		Kam003	A	14/04/2020	No	No
AREG000393	SP500	Sprint Colour Copier	Hardware	WHSE		Kam002	A	14/04/2020	No	No

Related Topics

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

MNU.007.034

