

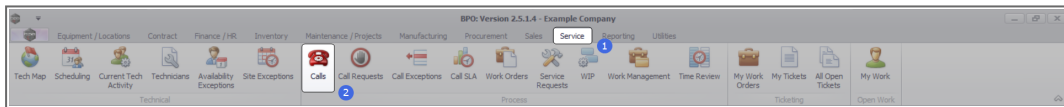
SERVICE

CALLS - ON SITE INFO

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

On Site Info is the Equipment Asset Listing screen that has been filtered to only display serialised items that belong to the customer (customer assets) or internal assets that are on contract with the customer.

Ribbon Select *Service > Calls*



- The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balances	CR	Change Request			107		3
EN0001002	Salematic Driver	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual.	SR	Select Call Type			19-12/202		3
EN0001001	Young Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			en123		3
EN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Batch/Print	MR	New Job Rental				BPO2 TEST 1	3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:55:17	Loan machine for temporary high volume printing requirement	SRV	Service				TOP1234OLD	3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
EN0000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	03/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			en123		3
EN0000985	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
EN0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN23412346		3
EN0000982	Young Electric	18/06/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our manager email entered	ADM	Administration			107		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ADM	Administration			095010155		3
EN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000964	Red PC / IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Sub/Bin Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

- Select the **Call** you wish to work with.

CallReference	CustomerName	CallDate	CallDate	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	12/12/2022	Awaiting Acceptance	Ann Hilson	09:09:10	Test account balance	CR	Change Request			107		3
BN CH001002	Silverleaf Drive	12/12/2022	Awaiting Acceptance	Nary Thompson	06:38:20	Test call for account balance manual	DR	Select Call Type			05-12/202		3
BN CH001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000999	Hope Works (Pty) Ltd	20/06/2022	Unassigned		14:08:11	Loan machine for temporary high volume printing requirement	SRV	New Deal Rental			TOP123456		3
BN CH000991	Aplic Lusa Inc	04/03/2022	Unassigned		05:36:15	Contact Closure - C0000051	DR	Select Call Type					2
BN CH000989	Derton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	12/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BN CH000987	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/04/2022	Unassigned		05:09:13	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN CH000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			5202413596		3
BN CH000982	Young Electric	18/04/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000981	Young Electric	18/11/2019	Awaiting Acceptance	Banca Du Tait	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000979	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Banca Du Tait	06:30:26	Test another call email	ADM	Administration			095019151		3
BN CH000978	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Banca Du Tait	15:57:00	Test new call for email description in body	CR	Change Request			095019151		3
BN CH000977	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000976	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000964	Hock PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			14787		2
BN CH000963	Westwood Dynamic	21/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Edit** button.

CallReference	CustomerName	CallDate	CallDate	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	12/12/2022	Awaiting Acceptance	Ann Hilson	09:09:10	Test account balance	CR	Change Request			107		3
BN CH001002	Silverleaf Drive	12/12/2022	Awaiting Acceptance	Nary Thompson	06:38:20	Test call for account balance manual	DR	Select Call Type			05-12/202		3
BN CH001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000999	Hope Works (Pty) Ltd	20/06/2022	Unassigned		14:08:11	Loan machine for temporary high volume printing requirement	SRV	New Deal Rental			TOP123456		3
BN CH000991	Aplic Lusa Inc	04/03/2022	Unassigned		05:36:15	Contact Closure - C0000051	DR	Select Call Type					2
BN CH000989	Derton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	12/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BN CH000987	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/04/2022	Unassigned		05:09:13	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN CH000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			5202413596		3
BN CH000982	Young Electric	18/04/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000981	Young Electric	18/11/2019	Awaiting Acceptance	Banca Du Tait	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000979	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Banca Du Tait	06:30:26	Test another call email	ADM	Administration			095019151		3
BN CH000978	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Banca Du Tait	15:57:00	Test new call for email description in body	CR	Change Request			095019151		3
BN CH000977	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000976	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000964	Hock PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			14787		2
BN CH000963	Westwood Dynamic	21/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- The **Call maintenance : Call ref - [call reference number]** screen will display.
- Click on the **On Site Info** tile.

Call maintenance : Call ref. - CN0005300 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Customer: Big Bargains
 Contact: Francis Parish
 Contact No.: 01010101
 Address: 29 Dune Ave, New Town, Durban
 Call Type: Repair
 Error Code: [Empty]
 Description: Printer displaying error code
 Call Date Time: 18/01/2022 12:51:45
 Priority: 3
 SLA: [Empty]
 Date Required: 18/01/2022
 Order No: [Empty]
 Logged By: JulandaK
 Status: N - New
 Optional No: [Empty]

ReferenceType	ReferenceNo
Serial No	AKM001002
Prior Call Reference	
Call Request Reference	
Contract No	
Location	
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	

CallReference	CallDate	CallTime	Description
CN0005300	18/01/2022	12:51:45	Printer displaying error code

ON SITE INFO LISTING

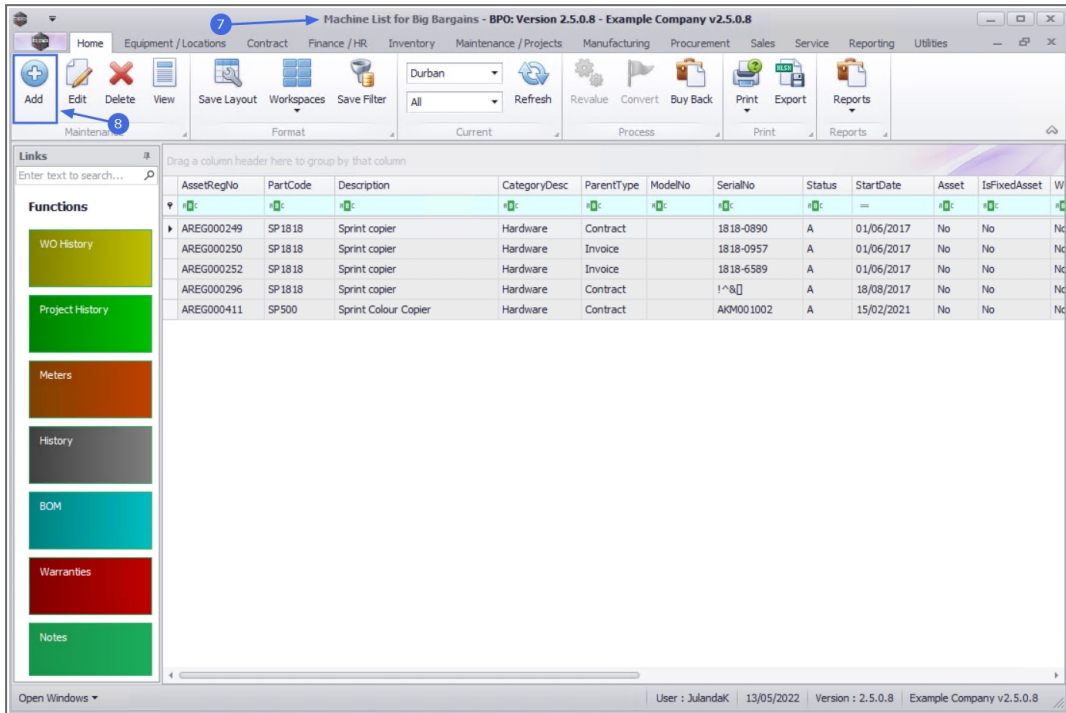
- The **Asset listing or Machine List for [Customer Name]** screen will be displayed.

Machine List for Derton / Technologies - BPO: Version 2.5.1.4 - v2514 Example Company

AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StarDate	Asset	WOAttachment	IsIveAsset
SP2020		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	abc147c	A	07/05/2014	No	No	No
SP2020		SP2020 Sprint Colour Multi Functional Copier	Hardware	Contract	SP2020	2020-102046	A	03/07/2014	No	No	Yes
SP1912		SP19-12 Colour Copier	Hardware	Contract	SP1912	1912-102045	A	03/07/2014	No	No	Yes
SP2020		SP2020 Sprint Colour Multi Functional Copier	Hardware	Contract	SP2020	20-457896	A	07/01/2015	No	No	No
AREG000080		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	2020-8996	A	23/02/2017	No	No	No
AREG000088		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	2020-9194	A	23/02/2017	No	No	No
AREG000089		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	2020-9195	A	23/02/2017	No	No	No
AREG000090		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	2020-9196	A	23/02/2017	No	No	No
AREG000092		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	2020-9198	A	23/02/2017	No	No	No
AREG000097		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	220-8084	A	23/02/2017	No	No	No
AREG000100		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	2020-8087	A	23/02/2017	No	No	No
AREG000192		SP2020 Sprint Colour Multi Functional Copier	Hardware	Warehouse	SP2020	2020-43255	A	16/05/2017	No	Yes	No
AREG000225	2020-856	Drum	Accessories	Warehouse		2020-1111	A	23/05/2017	No	No	No
AREG000226	2020-856	Drum	Accessories	Warehouse		2020-2222	A	23/05/2017	No	No	No
AREG000308	SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	Invoice	SP2020	M00019120000	A	13/02/2018	No	No	No

ADD EQUIPMENT

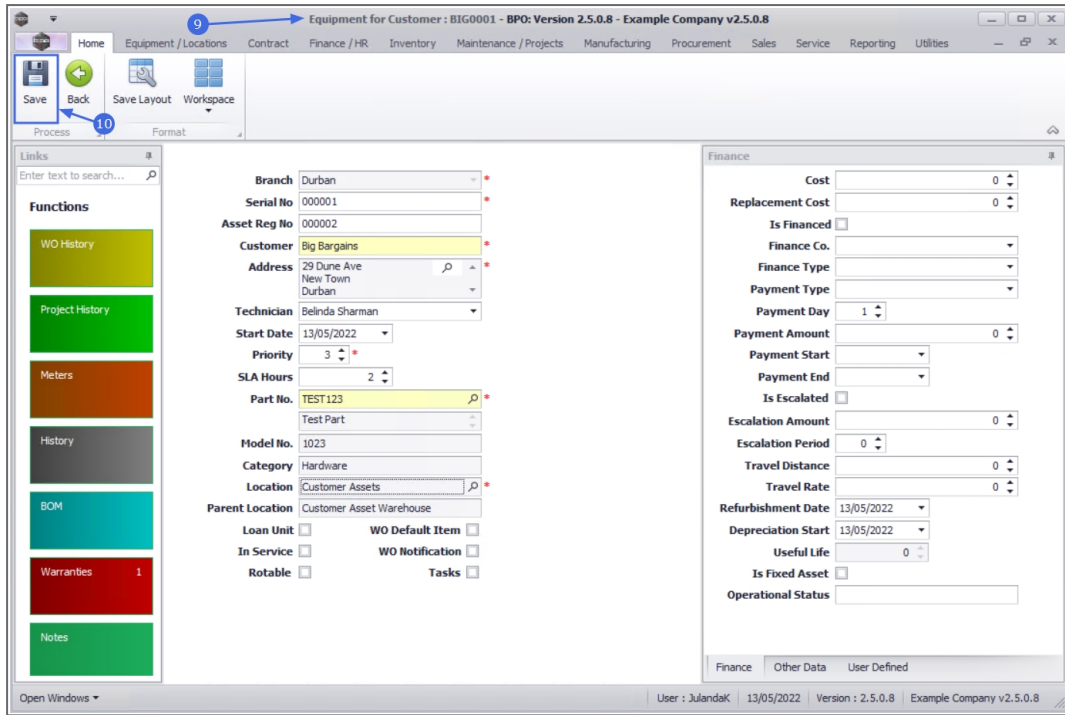
- Click on **Add**.



- The **Equipment for Customer : [customer code]** screen will be displayed.
- Add the Customer asset details as required and click on **Save**.



For a detailed handling of this topic refer to [Assets - Add - Asset Details](#)



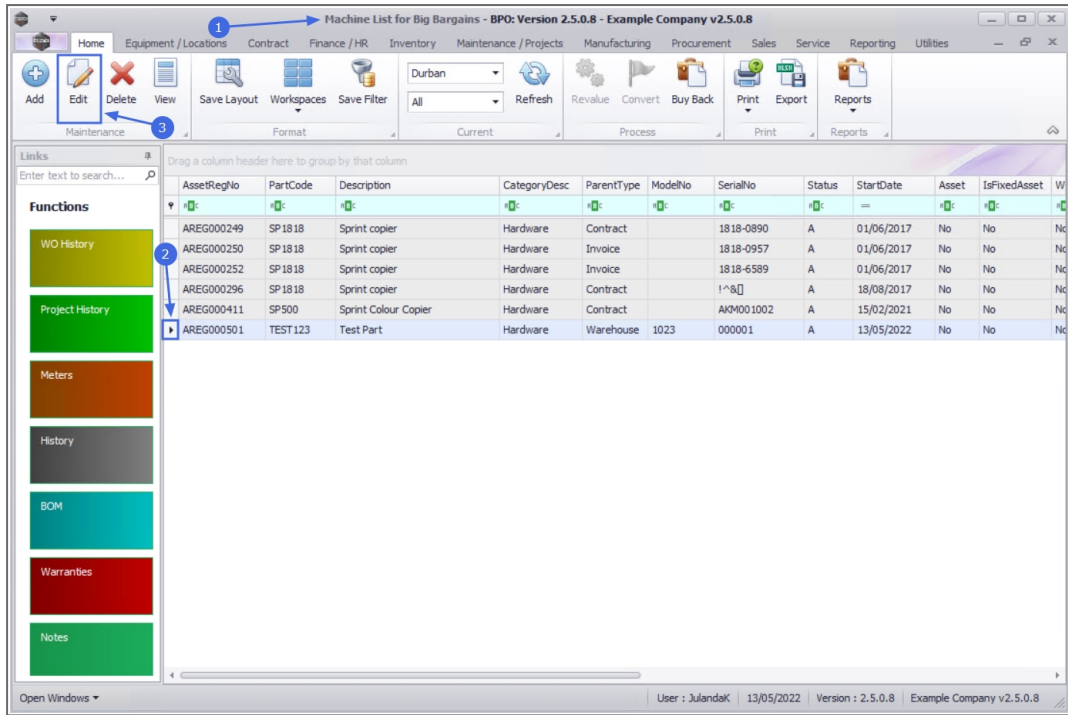
EDIT EQUIPMENT

After an asset is created, you may wish to edit certain attributes and details of the asset. Only certain asset details can be edited. You may have [user security rights](#) set in your [company configuration](#) whereby a control may be applied to these editing rights. For example, only a manager can edit certain details, for example, *incorrect serial number input* (which affects stock reports) but an administrator can edit other less impactful details.

It is important to note that if the serial number is edited for a company asset, [all](#) stock reports will be affected.

Explanations for all the **Details** and **Finance** fields can be found in [Introduction to Assets](#).

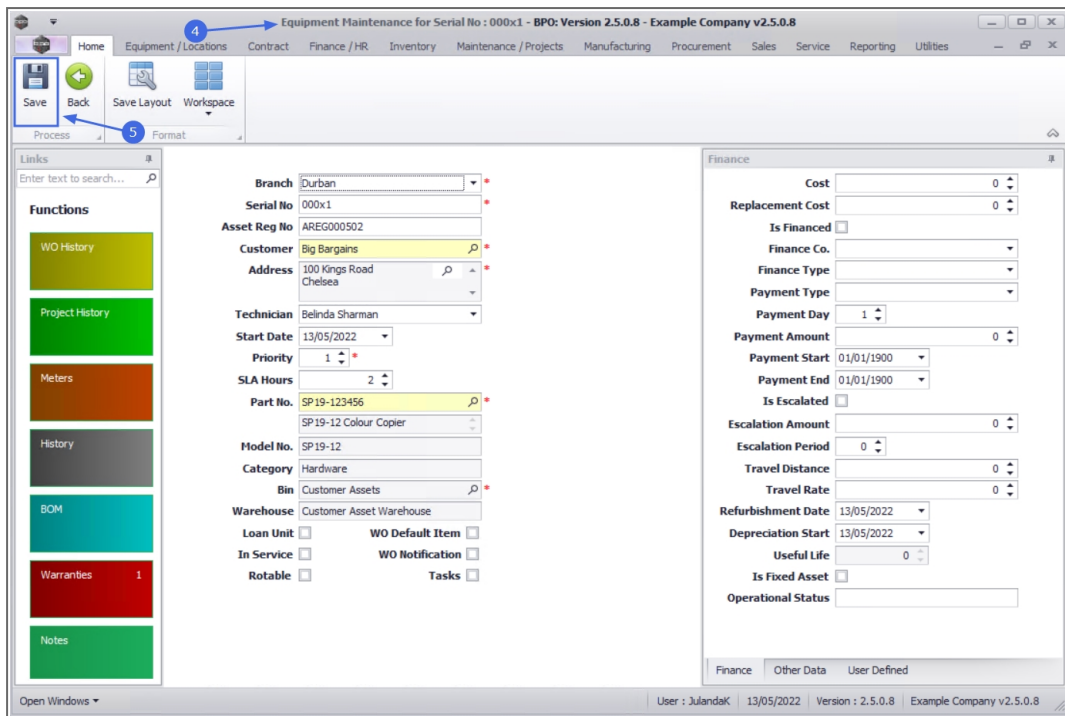
- From the **Machine List for [customer name]** screen,
- Click on the **row** of the asset detail you wish to make changes to.
- Click on **Edit**.



- The **Equipment Maintenance for Serial No : [serial number]** screen will be displayed.
- Make the required changes to the asset details and click on **Save**.

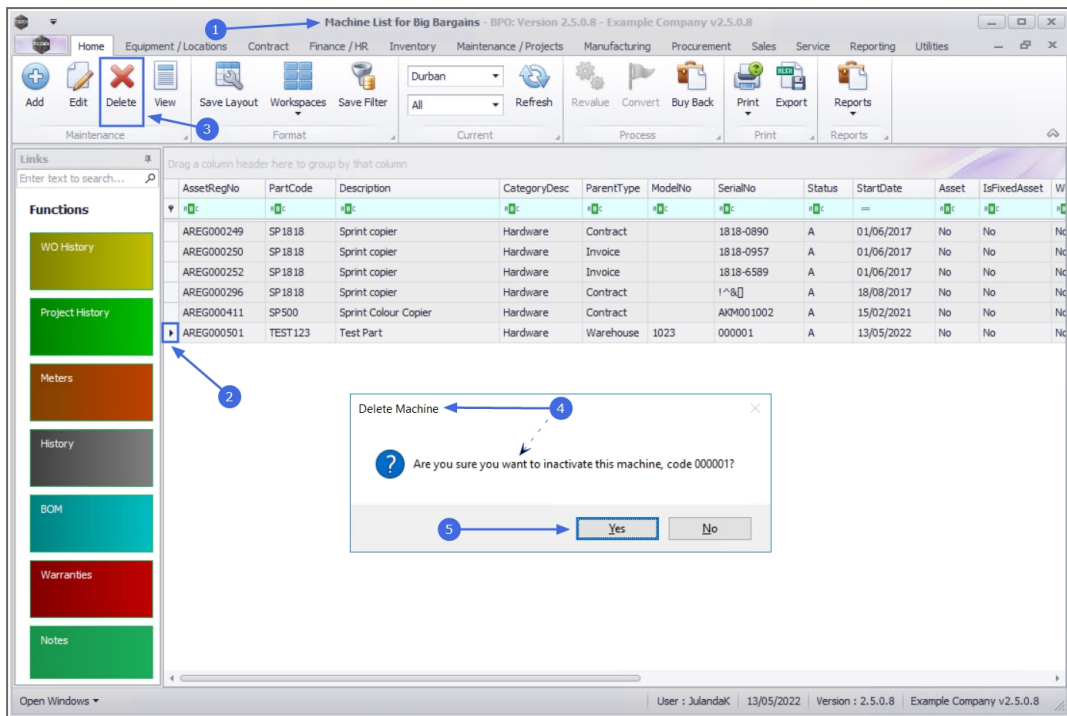


For a detailed handling of this topic refer to [Assets - Edit - Asset Details](#)



DELETE EQUIPMENT

- From the **Machine List for [customer name]** screen,
- Click on the **row** of the asset you wish to remove,
- Click on **Delete**.
- When you receive the **Delete Machine** message to confirm;
 - **Are you sure you want to inactivate this machine, code [serial number]?**
- Click on **OK**.

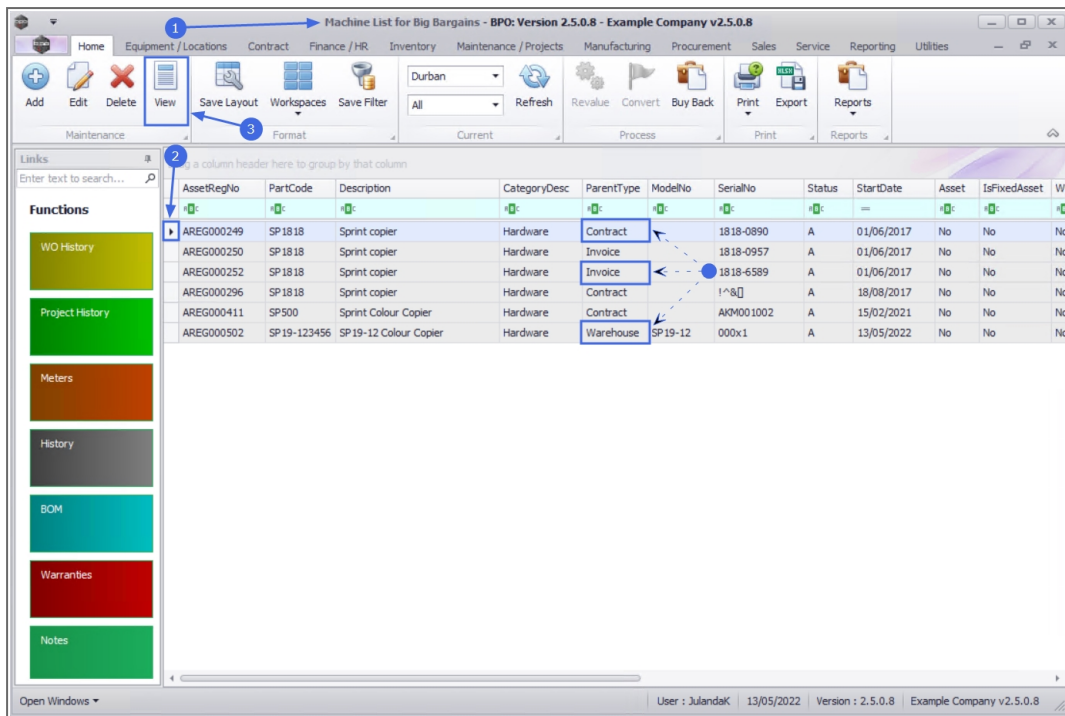


VIEW EQUIPMENT

- On the **Machine List for [customer name]** screen,
 - Note that there are 3 potential **Parent Types**;
 - Contract,
 - Invoice, and
 - Warehouse
 - Each of the Parent Types will affect which fields and field content will display on the screen.
- Click on the **row** of the customer asset you wish to view.
- Click on **View**.



For a detailed handling of this topic refer to View Client Machine

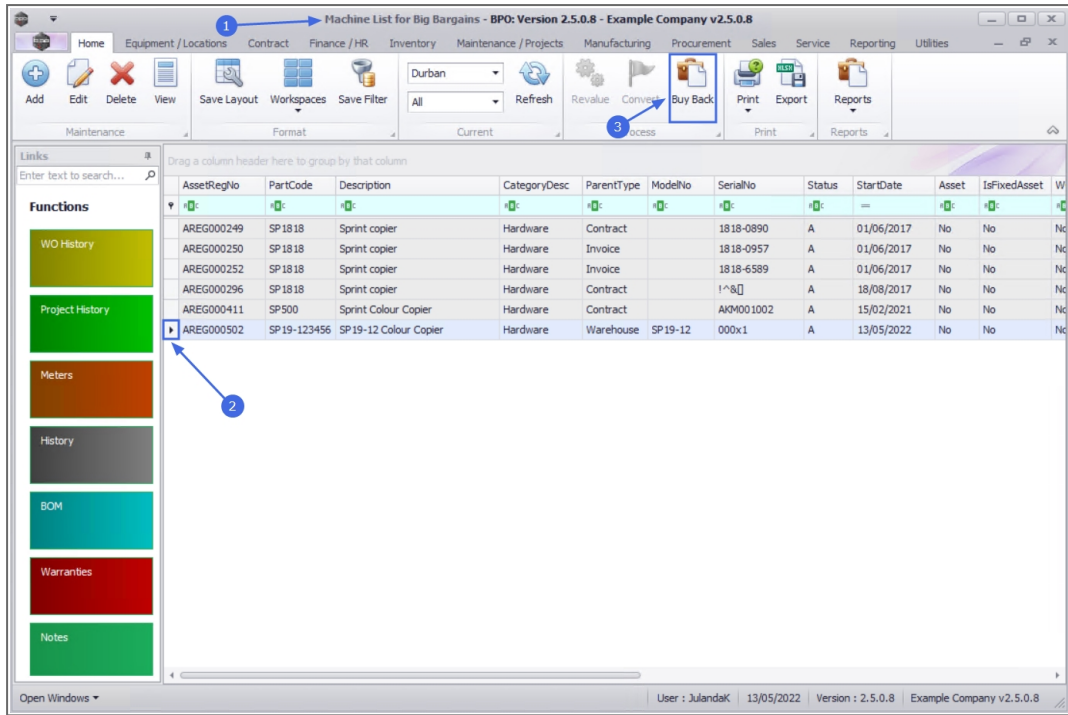


BUY BACK

Use this process only if;

- A Stock item or an Internal Asset has been incorrectly loaded as a Customer Asset
- A Contract is ending and the customer asset is to become the company property.

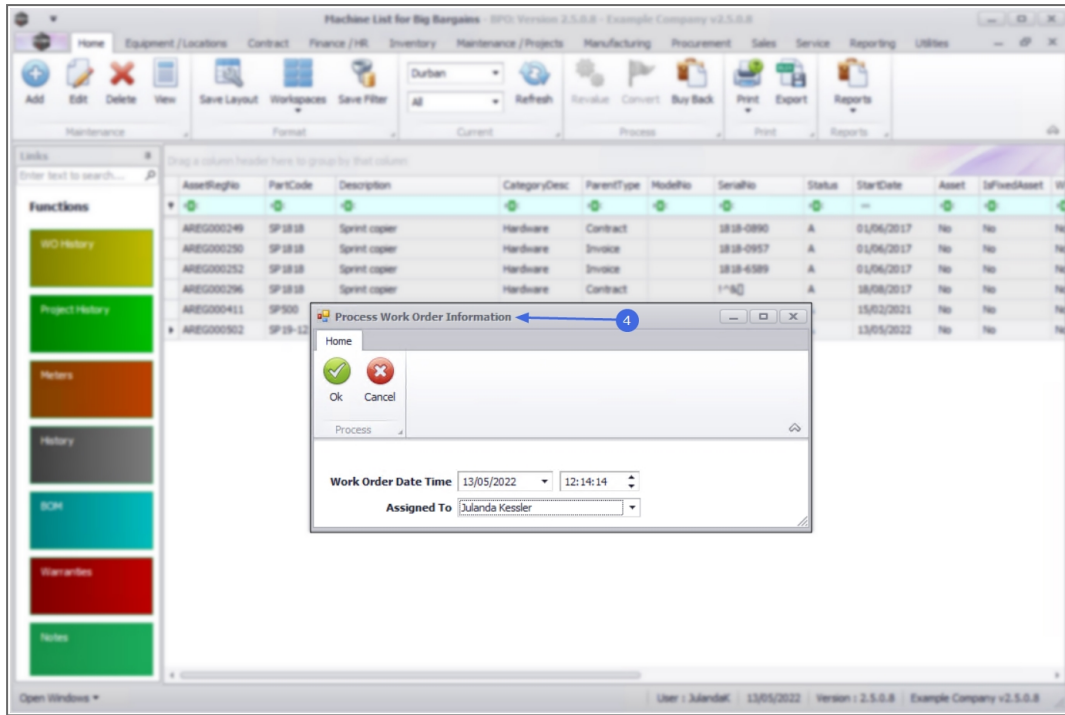
- From the **Machine List for [customer name]** screen,
- Click on the **row** of the asset you wish to buy back.
- Click on **Buy Back**.



- The **Process Work Order Information** screen will display.



Refer to **"Add Work Order Details"** on page 4 for a detailed handling of this topic.

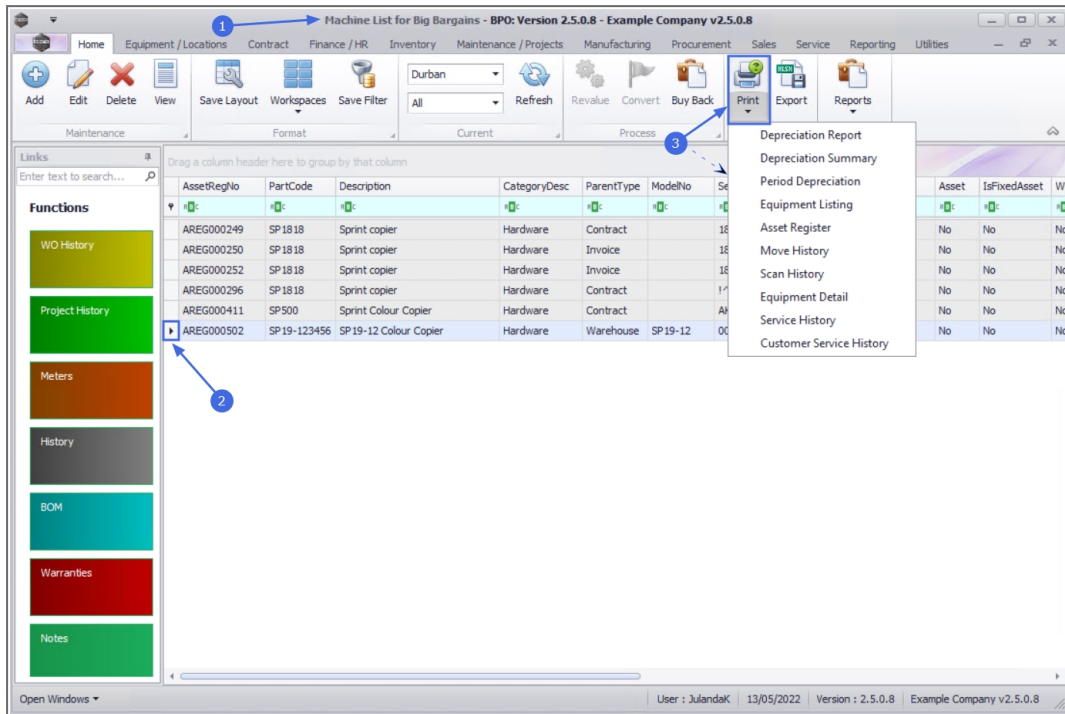


PRINT

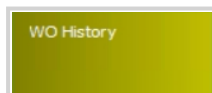
The Print option from the Machine List for Customer screen, will display a list of reports that can be generated and printed for an asset.

- From the **Machine List for [customer name]** screen.
- Click on the **row** of the asset you wish to print a report for.
- Click on **Print** to display the reports drop-down list.
- Click on the **Report** you wish to generate.
 - [Assets - Print - Depreciation Report](#)
 - [Assets - Print - Depreciation Summary Report](#)
 - [Assets - Print - Period Depreciation Report](#)
 - [View Asset Listing Report](#)
 - [Assets - Print - Asset Register Report](#)
 - [View Asset Movement History Report](#)
 - [View Asset Scan History Report](#)

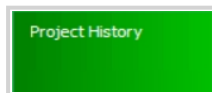
- [View Asset Detail Report](#)
- [Assets - Print - Service History Report](#)



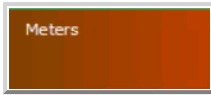
FUNCTION TILES



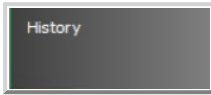
The [Work Order History](#) tile will direct you to the Work Orders for machine screen where you can **Add**, **Edit**, **Delete** and **View** a Work Order linked to the asset, as well **Close**, **Complete** and **Reinstate** a Work Order. Refer to [Introduction to Work Orders](#)



The [Project History](#) tile will direct you to the Project Listing for equipment screen where you can **Add**, **Edit**, **Apply a Project Methodology**, **Adjust Project Baseline** or **Close a Project**, as well as view **Employee and Project Time** and generate a **Progress Report** and **Print** a Project **Delivery Note**. Refer to [Introduction to Projects](#)



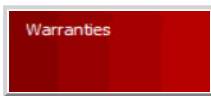
The [Meters](#) tile will direct you to the Meter Listing for Serial No screen where you can **Add, Delete** and **Reset a Reading**. Refer to [Assets - Meters - Add](#)



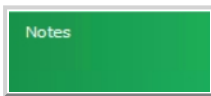
The [History](#) tile will direct you to the Transaction History for Equipment screen where you can **view** the history trail for a serialised equipment item. Refer to [Asset History](#)



The [BOM](#) tile will direct you to the BOM Listing for equipment screen where you can **Add, Delete** and **View** the linked Bill of Materials. Refer to [Asset Bill of Materials](#)



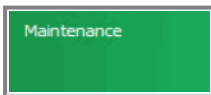
The [Warranties](#) tile will direct you to the Warranties for Equipment screen where you can **Add, Edit** and **View** the warranties linked to an item. Refer to [Assets - Warranties - View, Add, Edit](#)



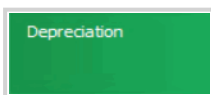
The [Notes](#) tile will direct you to the Notes Listing for Serial No screen where you can **Add** and **view** notes and comments recorded to a particular asset. Refer to [Assets - Notes - View, Add](#)



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



The [Maintenance](#) tile will direct you to the Maintenance Methodology for Asset screen where you can **Add, Edit** and **Delete** a maintenance task issued. Refer to [Link a Task](#)



The [Depreciation](#) tile will direct you to the Asset Depreciation screen where you can **view** the depreciation details for an Asset. Refer to [Asset Depreciation History](#)

MNU.122.045