Asset Management

10/30/2024 3:52 pm CDT

Overview

Asset Management (formerly known as Per Diem Pricing) can be used to keep track of your valuable equipment as it moves from job to job.

This article will review:
- Settings and Navigation
- Adding Individual Assets
- Asset Tracking on Proposals
- Placing an Asset
- FAQs

Settings and Navigation

Asset Tracking can be turned on for individual parts in **Control Panel > Parts/Add Ons**.

Towards the top of the page, you will see a dropdown menu that gives you the choice between **Organization** and **Contact**.

If this is set to **Organization**, the asset belongs to the organization and is assumed to be rented out when applied to a proposal.

If it is set to **Contact**, the asset will reside at a contact's location but it may need to be checked and maintained by your team.

A **Replacement Cost** can also be assigned to this part, indicating the cost to replace the item if it is lost or damaged while left at a contact's property. This field is found in the **Pricing** section of the part settings.

The replacement cost of this item

Adding Individual Assets

Once you have enabled a Part to be tracked as an organization-owned asset, you'll want to add individual assets that you can track. For example, you may have 4 identical units that you have rotating between your various appointments. On the Part details page, in the Additional Details section you will see a tab that says Assets. Select that tab, then click Add.

Here is where you can record a serial number, status, and condition of the item as well as when it entered or existed service.

Asset Tracking on Proposals

When Asset Tracking is enabled for any Part on a proposal, the word Days will appear below the line items. Click that to enter in a date range that this part will be checked out with this service.

Asset Settings

Start Date*	11/04/2024
Through Date*	11/06/2024
Days	3 days

The system will then take the resulting rates from those lines, multiply by the number of days and show that on the proposal. This will allow you to mix items at the proposal level where some are per day and some are flat rate.

Test Service ▼	Sample description of service. ☑ Taxable ✏	1	500	$500.00
Large Industrial Fan	Fan rental by day, check in and then return ✏	1	300	$900.00
Example Part 1	Example Part 1 ✏	1	100	$100.00
┃part-	Search...			

Days	11/04/2024 – 11/06/2024	3 days
Repl Cost		$0.00
Subtotal		$1,500.00
Tax	Example State Tax ▼	$43.15
Total		$1,543.15

Asset parts now multiply the unit cost by the number of days for the Materials calculation for proposal margins.

Placing an Asset

When a service agent is running an appointment that includes an Asset, they will be prompted with the option to Place that item.

Additional

Past Appointments	32	>
Contact Pictures	3	>

Place >

Take 1 After Pictures >

They will be directed to a page where they will enter the Serial Number. They must click **Return** on their keyboard for the information to populate.

You can review the current location of each asset in **Control Panel > Parts** back on the Assets tab for the part.

In the "hamburger menu" of the app, there is also a section called **Inventory Maintenance** where a user may scan an item or type in a serial number to find that unique Asset in the system and update its condition/service/etc.

FAQs

Why doesn't organization asset show where it was placed on the part details page when was just used on an appointment?

An Asset must be manually placed at an appointment by the Service Agent. If this step does not happen, the location of the Asset will not be tracked.