

Asset Management

09/29/2025 11:28 am 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 > Edit a part > General**. Use the **Asset Tracking** dropdown menu to choose between **Organization** and **Contact**.

☐ Internal?

☒ Taxable?

Asset Tracking

✓ None

Organization

Contact

--Select one--

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.

After you set the Asset Tracking and Save the changes, you can edit the part again and assign a **Replacement Cost**. This indicates 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.

Replacement Cost

250

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.

Additional Details					
Collateral		Assets			
Add...	Name	Serial Number	Status	Condition	Location
Edit Delete	Fan 1	123ABC	In Service	Good	Test Service for Bella Notte on 11/4/2024 8:00:00 AM
Edit Delete	Fan 2	DEF456	In Service	Good	

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

Name*

Industrial Fan 1

Description*

Industrial Fan 1

Serial Number*

ABC123

Status

In Service

✓ In Service

Out of Service

Terminated

Condition

Good

✓ Good

Needs Repair

Damaged

Lost

Enter Service

9/1/2024

Leave 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.

Option	Item	Description	Quantity	Rate	Amount
<div>Select a template... ▾</div>	<div>Test Service ▾</div>	<div>Lorem ipsum dolor sit amet,</div>	<div>1</div>	<div>0</div>	<div>\$0.00</div>
<div><input checked="" type="checkbox"/> Taxable ✎</div>					
<div>⋮ × -option-</div>	<div>Example Part 1</div>	<div>Example Part 1</div>	<div>1</div>	<div>100</div>	<div>\$100.00</div>
<div>⋮ × -option-</div>	<div>Large Industrial Fan</div>	<div>Fan rental by day, check in and then return</div>	<div>1</div>	<div>300</div>	<div>\$300.00</div>
<div>⋮ × -option-</div>	<div>-part-</div>	<div>Search...</div>	<div></div>	<div></div>	
					<div>Days</div>
					<div>Repl Cost</div>
					<div>\$0.00</div>
					<div>Subtotal</div>
					<div>\$400.00</div>

Asset Settings

Start Date*

09/12/2025



Through Date*

09/15/2025

Days

4 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.

	<input type="text" value="-option-"/>	<input type="text" value="Large Industrial Fan"/>	<input type="text" value="Fan rental by day, check in and then return"/>	<input type="text" value="1"/>	<input type="text" value="50"/>	<input type="text" value="\$200.00"/>
	<input type="text" value="-option-"/>	<input type="text" value="-part-"/>	<input type="text" value="Search..."/>	<input type="text"/>	<input type="text"/>	
					<input type="text" value="Days"/>	<input type="text" value="09/12/2025 - 09/15/2025 4 days"/>
					Repl Cost	\$0.00
					Subtotal	\$300.00

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.

<

Asset Inventory Place

≡

Scheduled Mon, Nov 4, 2024 at 8:00a

Service

Test Service

Name

Bella Notte

Address

4222 Clinton Way | Austin, TX 78701

Community

Downtown Austin

123ABC

Serial Number

123ABC

Condition

Good

Status

InService

Place

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

Additional Details					
Collateral <u>Assets</u>					
Add...	Name	Serial Number	Status	Condition	Location
Edit Delete	Fan 1	123ABC	In Service	Good	Test Service for Bella Notte on 11/4/2024 8:00:00 AM
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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.

Shortcuts	
Home	>
My Schedule	>
Add a Contact	>
Schedule an Appointment	>
Inventory Maintenance	>
Parts/Add-ons Pricing	>
Hours	>

FAQs

Why doesn't organization asset show where it was placed on the part details pagewhen 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.