

# 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**.

The screenshot shows a form for adding or editing a part. The fields are as follows:

- Name\*: Industrial Fan
- Active:
- Description\*: Industrial Fan - will be left at property
- Color:  (Color selection icon)
- Taxable:
- Category: Materials
- Required For Service:
- Self Service:
- Internal:
- Asset Tracking: None (highlighted with a red box)
- Accounting Class: --Select one--

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

The close-up shows the 'Asset Tracking' dropdown menu with the following options:

- ✓ None (selected)
- Organization
- 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.

Replacement Cost

650

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.

The screenshot shows the asset tracking form for 'Industrial Fan 1'. The form includes the following fields and options:

- Name\*: Industrial Fan 1
- Description\*: Industrial Fan 1
- Serial Number\*: ABC123
- Status: In Service (dropdown menu with options: In Service, Out of Service, Terminated)
- Condition: Good (dropdown menu with options: Good, Needs Repair, Damaged, Lost)
- Enter Service: 9/1/2024
- Leave Service: (empty field)

Red arrows point from the Status and Condition dropdown menus to their respective options.

## 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
Select a template... ▾	Test Service ▾	Sample description of service.	1	0	\$0.00
<input type="checkbox"/> Taxable					
⋮ × -option-	Large Industrial Fan	Fan rental by day, check in and then return	1	300	\$300.00
⋮ × -option-	-part-	Search...			
		Days			
		Repl Cost			\$0.00
		Subtotal			\$300.00
		Tax	--Select one-- ▾		\$0.00
		Total			\$300.00

## 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.	1	500	\$500.00
	<input type="checkbox"/> Taxable			
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-	<a href="#">Search...</a>			
	<b>Days</b> 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.

<
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 🔄

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**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
Assets

Add...	Name	Serial Number	Status	Condition	Location
<a href="#">Edit</a>   <a href="#">Delete</a>	Fan 1	123ABC	In Service	Good	<a href="#">Test Service for Bella Notte on 11/4/2024 8:00:00 AM</a>
<a href="#">Edit</a>   <a href="#">Delete</a>	Fan 2	DEF456	In Service	Good	

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 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.