

Asset Actions Setup

Setup the various actions that can occur against an Asset for Asset item

To set an action against an asset go to

Asset Tracker Module> Configuration> Asset Action

The screenshot shows the 'User Management - User Search' interface. At the top, there is a search bar and several action buttons: 'Add' (highlighted with a red box), 'Edit', 'Delete', 'Clone User', 'User Leave', 'Lock Users', and 'Print'. Below the search bar, there are two tabs: 'Basic Search' and 'Custom Field Search'. The 'Basic Search' tab is active. Under this tab, there are search fields for 'Login ID:', 'Employee Name:', and 'Time Log Group:'. To the right of these fields, there is a 'Session Status:' dropdown menu set to 'All', an 'Active:' checkbox which is checked, and a 'No Of Active Users:' display showing '3'. At the bottom of the interface, there are four buttons representing different user types: 'Staff 38' (blue border), 'Consultant 1' (green border), 'Subcontractor 0' (purple border), and 'External 0' (grey border).

Then click add and the screen below will appear. To edit an asset action, highlight the asset action you want to edit then click edit

Asset Action Maintenance

Basic

Email

Enable Emailing:

☐

Code:

Check In

Description:

Check In

Action:

Log Action

▼

State:

In

▼

Action Icons:

Check In

▼

Sequence No.:

2

Show Return Date:

☐

Count:

☒

Allow Next Action:

☐

Next Action:

▼

Active:

☒

Save & Close

Save & New

Save

Close

Enable Emailing	Put a tick on to enable emailing
Code	Enter a code for the action
Description	Enter a description for the action
Action	Various actions can be done on an asset, log action, invoice, credit note, checklist, support log
State	There are four states to which an asset can be assigned, in, pending all, out and Disposed
Action icons	Set up an icon for the action
Sequence No	This is the sort order for the action drop down (You may want more frequently used actions at the top of the list)

Show return date	This should be off for any state that is 'in' and should be on for any state that is 'out'. When this is off, selecting an action will not save the return date.
Count	Put a tick on if you want the system to automatically count your assets
Allow Next Action	Put this tick on to allow next action
Next Action	Select the next action on the drop down menu selection
Active	Put a tick if it is an active action, and do not put a tick if it is inactive

Asset Action Grid

Go through the various actions and clean up the actions that you will not be using

We recommend the following actions remain in the system:

1. Available
2. Check-In
3. Check Out
4. Dispose (Works when you write off the asset and creates a stock level adjustment)
5. Sell (This works when you sell the asset and create an invoice)
6. Audit (Users this when you create your fixed asset audit, it will mark the items as being audited)
7. Bookin (Works with booking in feature in job costing)
8. .Bookout (Works with booking out feature in job costing)

Fixed Asset Action Setup

 Search
  Add
  Edit
  Delete
  Print Grid

Code:

Description:

Active: ☒



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#	Sequence No.	Status	Code	Description	Action	State
1	1		Available	Available	Log Action	In
2	1		AUDIT2	Audit Again	Audit	Out
3	1		Quote1	Duplicate code	Log Action	In
4	1		Quote2	deleteme	Log Action	In
5	1		Code with spac...	Delete This	Log Action	In
6	1		Ready	Ready	Log Action	In
7	2		Check In	Check In	Log Action	In
8	2.2		CHK_AVAIL	Check In then Available	Log Action	In
9	3		Check Out	Check Out	Log Action	Out
10	4		Reserve	Reserve	Log Action	Pending
11	5		Request	Request	Log Action	Pending
12	6		Report Damage	Report Damage	Log Action	Pending
13	7		Repair	Repair	Log Action	Out
14	8		Move Asset	Move Asset	Log Action	Pending
15	9		Perform Mainte...	Perform Maintenance	Check List	Out
16	10		Field Transfer	Field Transfer	Log Action	Out
17	11		Lock	Lock	Log Action	Out
18	12		Dispose	Dispose	Log Action	Out

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