

Asset Management Trackit

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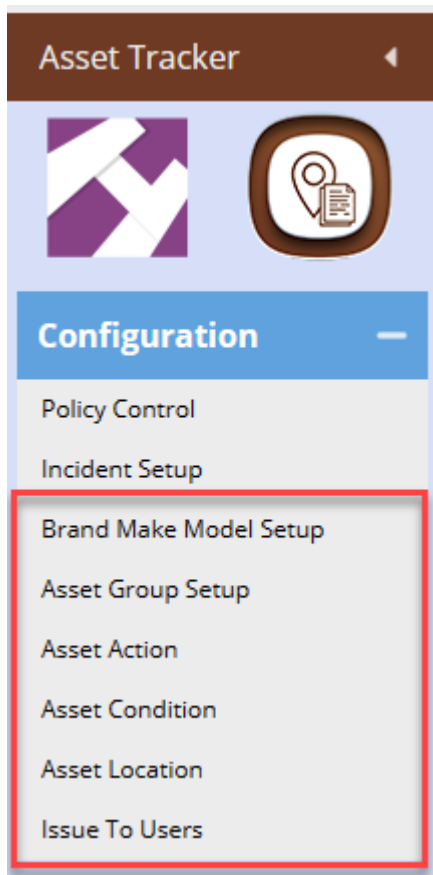
Preparing for Asset Management

Preparing for Asset Management

There are a few setups that are required before working with the assets

Training Video 202402 - [Asset_Intro.mp4](#)

The main system needs to be setup for the following



Brand Make Model setup	Brand make and model to allow easy searches and categories
Asset Group Setup	Setup an Asset group for depreciation journal grouping
Action Actions	Setup various actions for assets
Asset Condition	Setup the condition of assets

Asset Location	Setup the various locations for assets
Issue To Users	Setup Issue to users where assets are assigned to

Have the list of assets ready for importing into the system as a first-time setup.

Ask your consultant for assistance

Asset Tracker




Configuration +

Activity -

Asset Tracker

Asset Maintenance Schedule

Vehicle Register

Fixed Asset Audit

Mobile Asset Audit

Document Management

Incident Log Search

Asset Tracker Search

Search

Add

Edit

Clone

Action

Imports

Print / Export

Basic Search

Custom Search

Expand

Asset No.:

Customer:

Location:

Status:

Asset Name:

Employee:

Condition:

Stock Item:

Total Count 52

Total Assets 52

Checked Out 14

Asset Utilization 27 %

Fixed Assets 10

Vehicles 3

Asset

Activity Data

Tree View

Page 0 of 0

Remove Paging:

#	Att	Memo	Status	A-Status	Asset No.	Asset Name	Reference	Asset Category	Asset Location
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Asset Management App

Asset Modules defined

The Asset Tracker has four modules

Asset Search	Search for Assets and view information on the asset
Asset Actions	Create an action on multiple assets
Asset Audit	Action a standard audit or blind audit on location
Asset Scan Print	Create an action on an asset by scanning the barcode. The system will automatically print the label of information of that asset Used in a manufacturing process

Huge ERP Demo



Asset Search



Asset Actions



Asset Audit



Asset Scan Print

Asset Search

Search for Assets and view information on the asset

Asset Search video (2023 October) - [Asset Search.mp4](#)

Search on an asset by

- 1. Scanning the asset tag
- 2. Searching for the product

↓↑
A
Z

Asset Search

+

Asset:

● 100003

Epson till slip printer

Christchurch

New

Malcolm Granville



 GL9656

Ford Ranger Red

Christchurch

Damaged

Malcolm Granville

4x4 Ford Ranger

Red Ford Ranger equipped for outdoors



● 100002

Godex Printer

Christchurch

Used

Malcolm Granville

Printer

Godex G530



Logged in as: Malcolm Granville

	A-Z	Sort the asset list by A-Z or Z-A
	+ (Add new asset)	Add a new Asset
	Asset Barcode scan area	Scan a barcode to find an asset Great with a scanner
	Barcode	Scan a barcode using the camera Best used with a phone

View the asset

Tap on the asset to view the details

☰

← Asset Details

Asset

Details

Notes

Asset Info

Actions

Linked Items

Activity Report

Attachments

Photos

Asset



Status:

● Available

Asset Number:

100003



Asset Name:

Epson till slip printer

Location:

Christchurch

Condition:

New

Logged in as: Malcolm Granville

Asset Menus

These menus are activated via the security against the user on the main system

Asset	View Basic information on the asset
Details	View Additional information like warranty, Next Service Date, Additional fields
Notes	View notes on the asset
Asset Info	View financial information on the asset eg. Cost price, supplier, when purchased
Actions	View all the actions done against the asset Create a new action on this asset by clicking on the Plus

Linked Items	View all linked items against the asset Click on the Plus icon to linked multiple assets to this asset
Activity Report	View all activities done on this asset
Attachments	See all attachments eg. photos, pdf documents etc
Photos	Add new photos or upload from gallery

Asset Information

View Basic information on the asset

	Save updated information on the asset
	GPS tag the asset If you don't see this icon, contact your administrator to add to your security profile

Asset



Status:

● Check Out

Asset Number:

GL9589



Asset Name:

Office Chair new Black leather

Location:

[Auckland](#)

Condition:

[Used](#)

Employee:

Charlotte Lockhart

Reference:

Office Chair 2

Description:

Fixed Asset Office Equipment Chair Black

Client:



Brand:

Hardware



Make:

Harddrive



Model:

External



Serial Number:

001D9A05278F



Comment:

GPS Location:

Picture	Default image of Asset
Status	Current Action status of Asset
Asset Number	Asset number, Asset barcode
Asset Name	Description and name of asset

Location	Current Location To update this field one is required to create an action against the asset
Condition	Current Condition To update this field one is required to create an action against the asset
Employee	Current Employee To update this field one is required to create an action against the asset
Reference	More information on this asset
Description	Long description describing this asset
Client	A client linked to this item
Brand	The Brand category of this asset
Make	The Make category of this asset
Model	The Model category of this asset
Serial Number	Serial number of asset
Comment	Comment on asset
GPS Location	The GPS coordinates

Asset Actions

Create an action on multiple assets

Asset Actions video (2023 October) - [Asset Actions.mp4](#)

Actions logged against an asset are as follows:

1. Location
2. Condition
3. Issued to

Icons defined

	Full item details on grid
	Compact grid view
	Multiple item scanning
	Single item scanning Allows only one scan per asset
Send to Server Button	Updates the assets with the action

Issue By:

Malcolm Granville

Action:

Check Out

Issue To:

Malcolm Granville

Location:

Not Selected

Condition:

Not Selected

Return Date:

2023/11/08

Description:

Check Out

Add Asset

#1

GL9589

2023-09-20 14:54:30

Check Out

Malcolm – Malcolm Granville

Check Out

#2

ITW001

2023-09-20 14:54:24

Check Out

Malcolm – Malcolm Granville

Check Out

Send To Server [2]

Issued By	The person who is issuing the action This can be a fixed field or activated for multiple users Multiple user is activated on security
Action	Select the action on the actions eg Check in or Check out etc
Issued To	Who are you issuing the assets to
Location	Where are the assets going to be located
Condition	What condition are the assets in
Return Date	An estimated return date
Description	Small description of the action on the assets
Batch No	Enter a batch number

Note: If you don't put anything into the Issue To, Location or Condition (eg they are left as Not selected) then the asset will retain its original log

Asset Audit

Create a Standard audit or blind audit

Asset Blind audit video (202401) - [Asset Audit.mp4](#)

Asset Results (202401) - [Asset Audit Results.mp4](#)

Standard Audit	Standard audit is green Standard Audit allows one to view items in location Once scanned the list is reduced
Blind Audit	Blind audit is blue Does not show assets at location Only shows items that are scanned in audit

Note: to limit the user from seeing the standard Audit, setup in security

Icons defined

	Full item details on grid
	Compact grid view
	Fetch information on the current asset which is not part of the current audit location. Information updated on which location it is from, assigned to and condition. It checks whether this asset exists in the system
	Scanned items are hidden
	Scanned items can be viewed in list Scanned items are marked with a green dot to show it is valid
	Blue icon - item in audit, but not scanned
	Green icon - Item scanned in audit and is found and valid

Activating an Audit

Once all basic information has been filled in

Audit	Full (Default) or Part audit
Type	Standard or Blind audit
Description	Default description which can be overridden
Location	The location of the audit
Unassigned Location	The location that assets will be moved to that have not been audited
Action	The action assigned to the audit

Buttons defined

In order to start the audit, the basic information must be filled in.

Then click on the blue start button to activate the audit

Start Audit	Start the audit
Cancel Audit	Cancel the current
Complete Audit	Complete the audit and update the assets that an audit was done

Note: A new audit cannot be created until the audit is complete or Canceled

Full and Part Audit

Full Audit	Full Audit will audit all items within the location, any items that are not audited will be moved to the Unassigned location
Part Audit	Part Audit allows one to add assets found after an audit is done. This will still show all assets within the location audit, but only add the additional assets to the Audit Location. All other assets not counted will remain in the Location.

Webatar

Asset Audit

Scan Barcode

No Items

Audit:Full

Type:FullPart

Description:Audit 2024-04-26

Location:

Unassigned Location:Unassigned

Action:Audit

No Last Scan

Start Audit

Cancel Audit

Complete Audit

Logged in as: Malcolm Granville

Standard Audit

Webatar

☰

Asset Audit

Type:

Standard

Description:

Audit 2023-09-20

Location:

Auckland

Unassigned Location:

Unassigned

Action:

Audit

No Last Scan

Start Audit

Cancel Audit

📄

Standard

🔗

Scan Barcode



● 160474

[NO BARCODE]

HP Laptop TS500

Auckland



● GL9589

GL9589

Office Chair new Black leather

Auckland – Board room



● 12345001

[NO BARCODE]

Crate Fold Green

Auckland

● 12345002

[NO BARCODE]

Crate Fold Green

Auckland



Complete Audit [0/10]

Logged in as: Malcolm Granville

Blind Audit

A blind audit is marked as blue

Only items scanned are shown

The system will not show what assets exist against the location

An unassigned location must be specified so that assets that are outside of the audit will be moved to the Location specified

Webatar

Asset Audit

Blind

Scan Barcode



Type:Blind

Description:Audit 2023-11-08

Location:Christchurch

Unassigned Location:Auckland

Action:Audit

Last Scan:GL9585

Time Scanned:2023-11-08 13:02

Status:Valid

Asset Name:Piston Head wizard

Asset Number:GL9585

Barcode:

Location:Christchurch

Start Audit

Cancel Audit

Complete Audit [2]

GL9585

[NO BARCODE]

Piston Head wizard

Christchurch



GL9589

GL9589

Office Chair new Black leather

Christchurch – Board room



Logged in as: Malcolm Granville

Asset Scan Print

Create an action on an asset by scanning the barcode.

The system will automatically print the label of information of that asset

Used in a manufacturing process

Webatar

Asset Scan Print

Scanned Items

Issue By:

Malcolm Granville

Action:

Check Out

Issue To:

Malcolm Granville

Location:

Not Selected

Condition:

Not Selected

Return Date:

2023/11/08

Description:

Check Out

Add Asset

#1

GL9589

2023-11-08 13:19:37

GL9589

GL9589

Office Chair new Black leather

Sent to Printer

Clear List [1]

Logged in as: Malcolm Granville

Automatic printing is setup in the main system

Asset Tag and Add

Tagging an asset with a label and adding this asset as new.

Video training 202402 - [Asset Tag Add.mp4](#)

Tag the asset

Clean the area that the tag or asset label needs to be applied.

Apply the label to the asset.



Add the asset

Adding the asset by clicking on the + button in Asset search

New Asset

N/A

Asset Number:

100005

Asset Name:

Zebra scanner

Location:

Not Selected

Condition:

Not Selected

Logged in as: Malcolm Granville

scanner scanners scanned...

1234567890

qwertyuiop

asdfghjkl

↑zxcvbnm↵

Taking a photo

Take a photo of the asset



Asset Photos

