

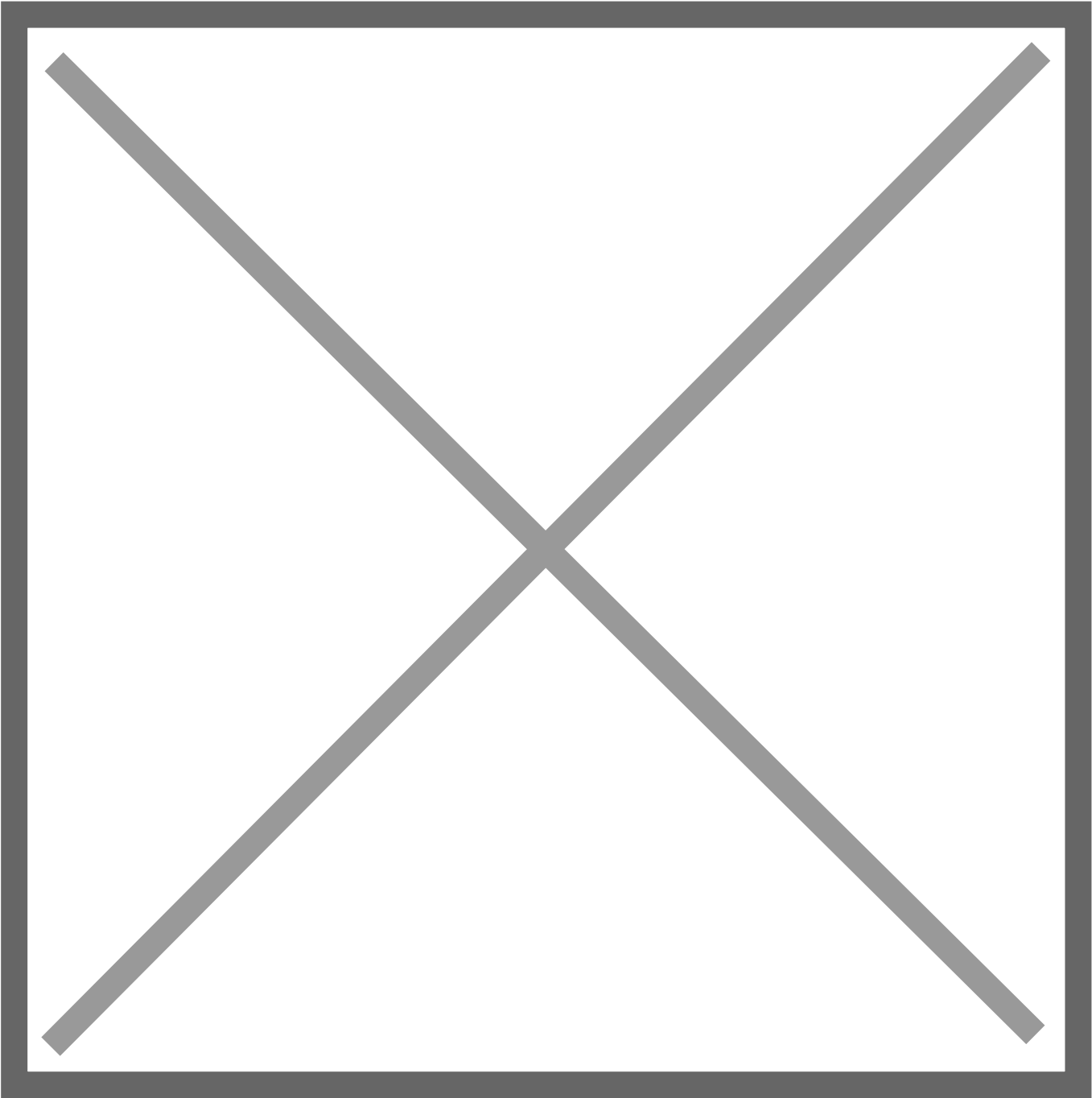
BAT Activity

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Asset Tracker Search

Asset

The asset item has many tabs and information on the asset



TrackIT / Fixed Asset Item

Setup your TrackIT or Fixed Asset Item



Asset Actions

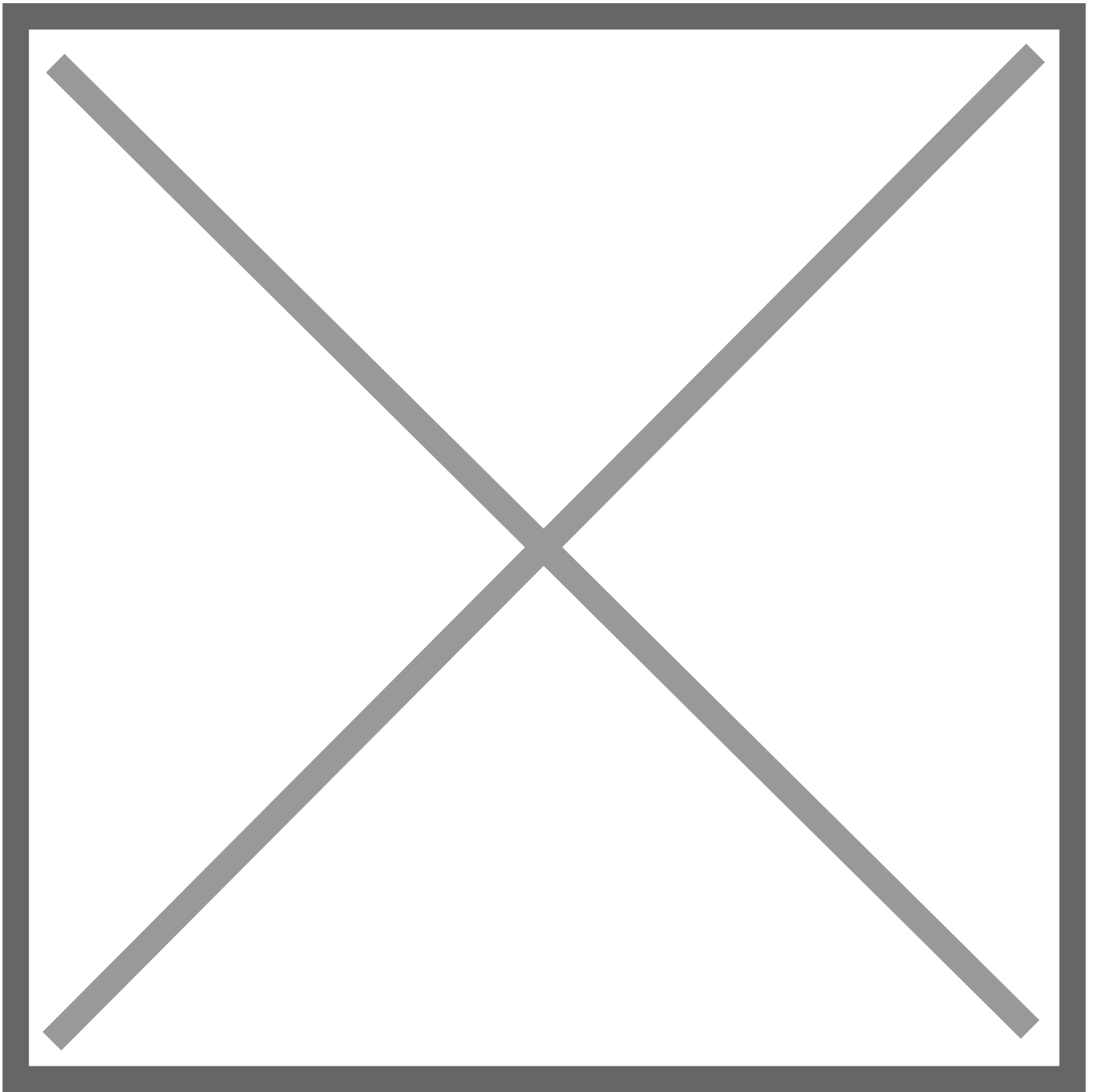
Asset actions are logs against an asset to control various historical actions that an asset has gone through.

One can create a single action log on an asset, this is done within the asset edit screen. It is found in the top right hand corner of the edit screen.

There is no restriction currently on the number of times you can create an action against an asset.

You can create multiple checkins on an asset.

For bulk capturing of asset actions, this is done via the Webatar mobile app for asset actions



Creating an asset allows one to change three main sections of an asset

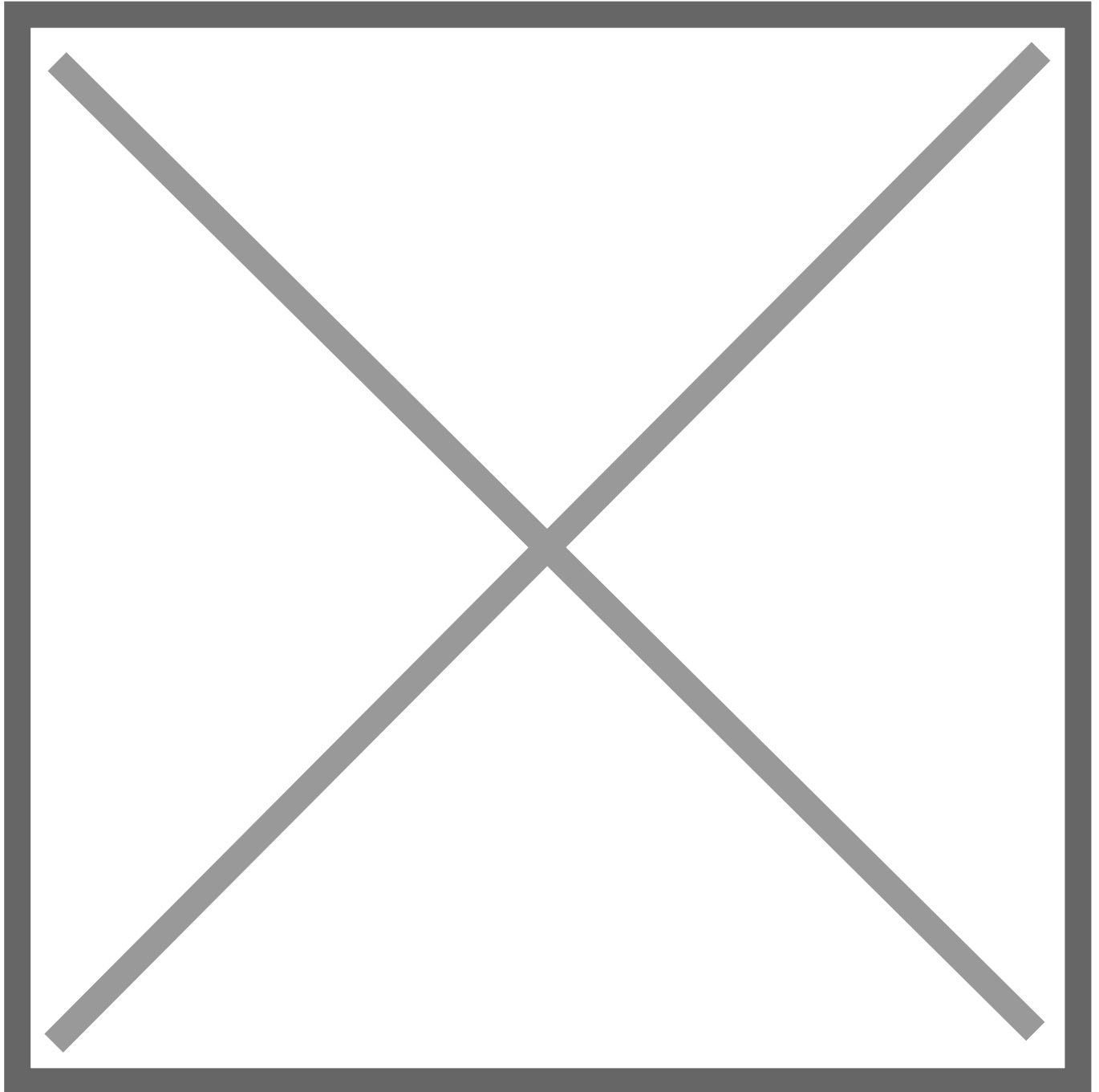
1. Issued To
2. Location
3. Condition

If any one of these three main sections is left blank, it will leave the asset in that state.

Once the action has been processed, it creates a log against the asset with a date timestamp and user who logged it.

View the history of a single asset, by going into the tab of that asset for action log.

One can view all action logs, in the menu item called action logs which looks across all assets.



Webatar app screen for multiple Asset actions

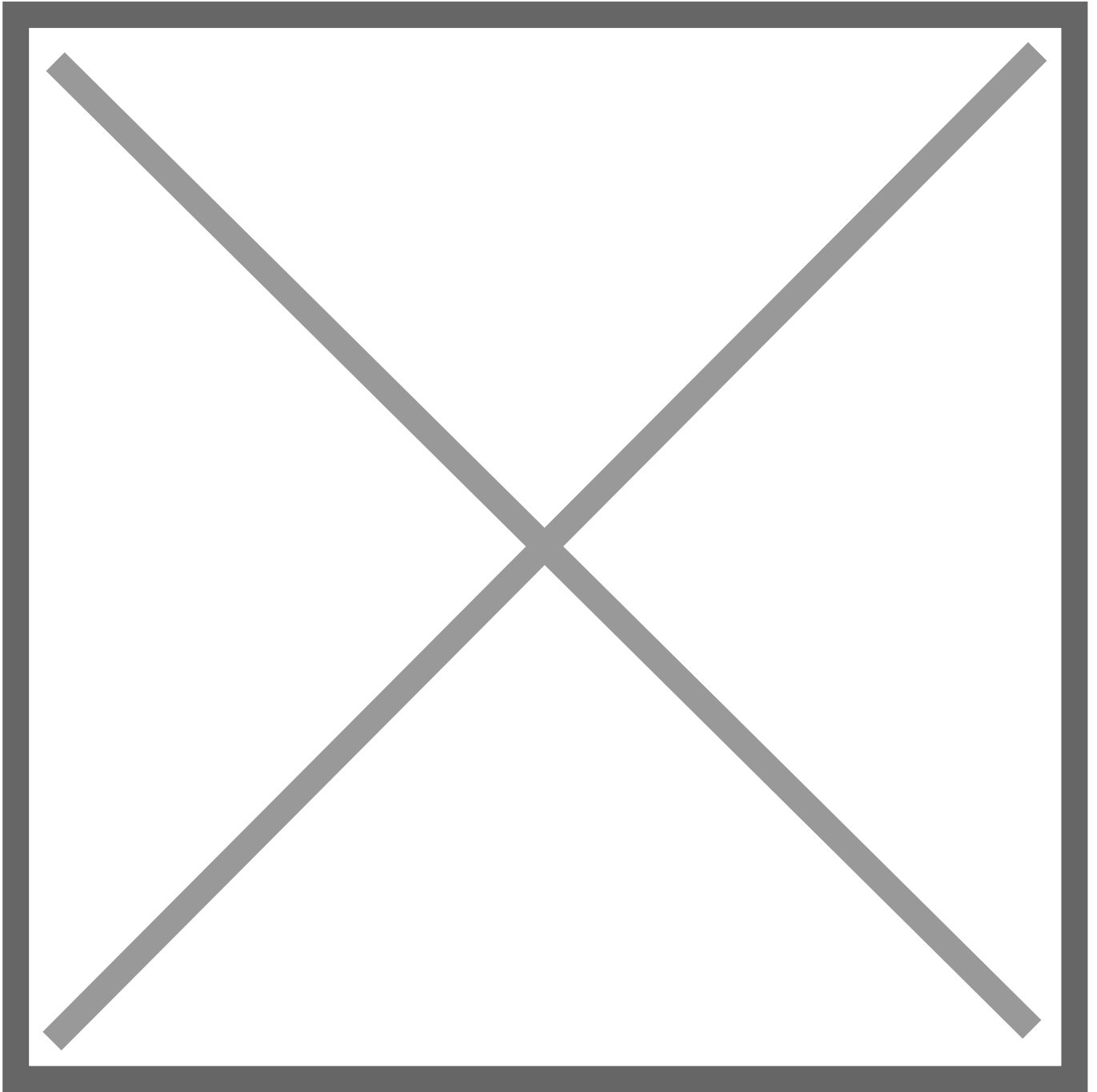


Statistics Setup

In order for the statistics to auto calculate the number of total assets and the asset utilisation percentage.

This needs to be set up in the system configuration module.

It gives the user the option to automatically specify specific assets that they want to count and mark as asset utilisation.



System Configuration Module> Administration> Defaults

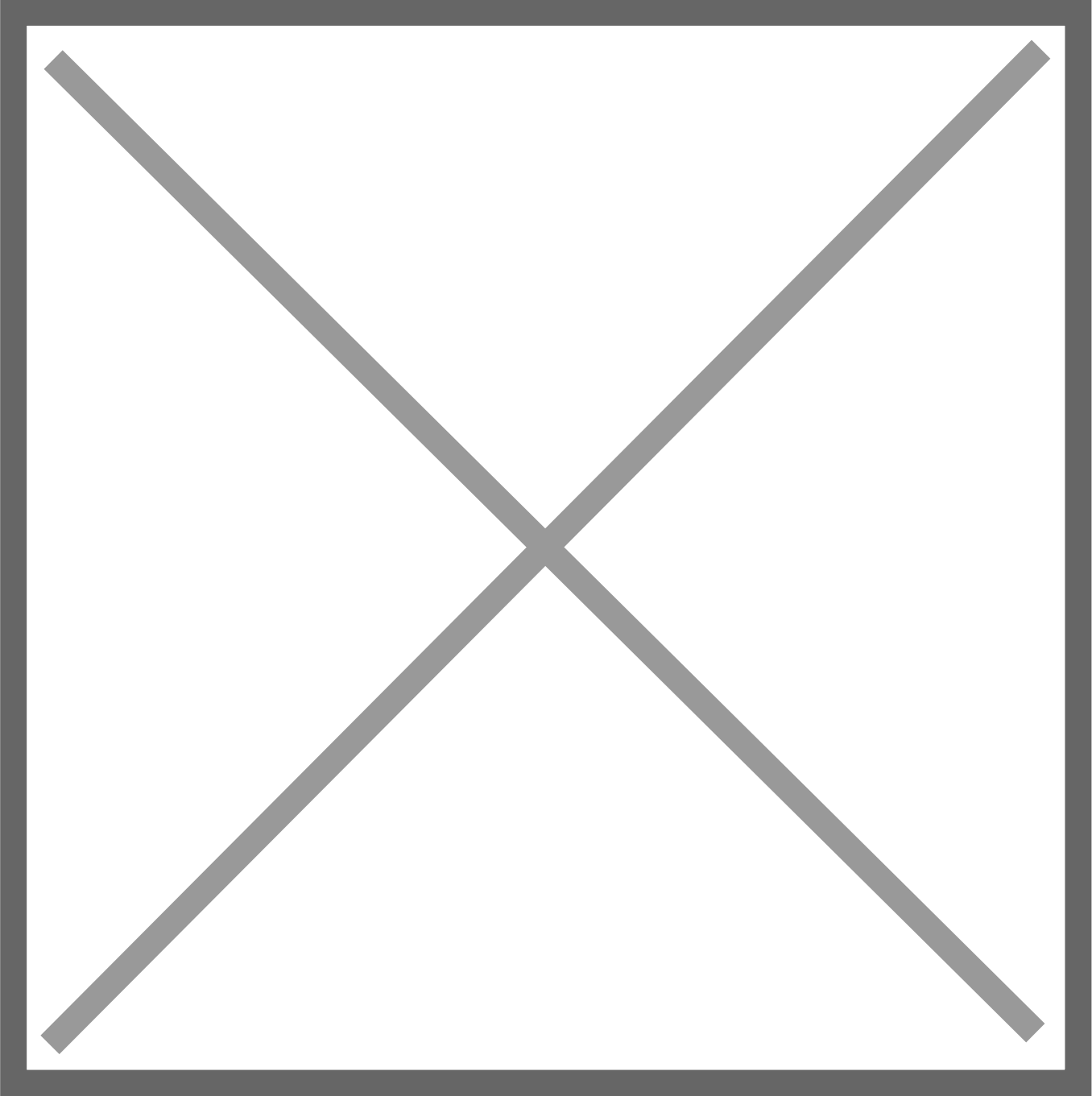
Click on the asset tab

And the various categories but you want to count his assets.

In most cases, it would be the fixed asset and general category.

Make sure that you save your settings before continuing.

This will then ensure that your statistics calculations work.



Fixed Assets Item Setup

Creating a Fixed Asset from the Inventory Module

Inventory Module > Configuration > Item Setup

The minimum data requirement for a Fixed Asset Inventory item in the Inventory Module is the item code for the fixed asset item, the description, and basic defaults.

Edit Inventory Item

Inventory Detail

Attachment Memo Suppliers Warehouses Alerts Inventory Overview Functions Close

Inventory Code: X006 **Description:** X006 Fixed Asset Item SN

General Details More Details Pricing Levels Custom Fields Bill of Material Properties Replacer

Inventory Code: X006

Category: Fixed Asset 1

Description: X006 Fixed Asset Item SN

Long Description:

Group Code:

Stock Category: Fixed Asset - Fixed Asset 2

Priority Level:

Bar Code: Print

Version Number: **Active:** ☒

Sync To Mobile: ☒ **Hide From Purchase:** ☐

Sync to WebShop: ☐ **Hide from Sale:** ☐ **Primary Image:**

Seasonal: ☐ **Slow Mover:** ☐ **Thumbnail Image:**

Save & New Save & Close Save Close

Click Add

Enter a code

Enter the description of the asset item

Select the Group code

Select the Category

Click the More Details Tab

Select the Fixed Asset GL Account

Edit Inventory Item

Inventory Detail

Attachment Memo Suppliers Warehouses

Inventory Code: X006 Description

General Details **More Details** Pricing Levels

General:

Default Supplier: [Dropdown] Commitment: [Dropdown]
Payment Method: [Dropdown] Excl. Fr: [Dropdown]
Weight per Unit: 0 Lead Tr: [Dropdown]
Expenses Property: [Dropdown] Job Act: [Dropdown]

UOM Type: [Dropdown] Re: [Dropdown]
Unit of Measure: [Dropdown] Co: [Dropdown]
Selling UOM: [Dropdown] Purchase UOM: [Dropdown]

Custom, Service and Fixed Asset items only:

Account Type: 1-2210 - Owned Assets - Office Equipment: Cost **3** Fixed Asset Setup **4**

Zero Cost on Docs: ☐ Job Costing Allocation: ☐ Job Capture Max Hrs: 0
Zero Cost on Job: ☐ Flag Report: ☐ Use Mapping COS: ☐

Serial Number: Tick this box for serialised inventory items that require serial number tracking. **5**
Serial No. Tracking: ☒

Save & New Save & Close Save Close

Asset Management Item Setup

Default Setting for Fixed Assets

Before creating a Fixed Asset for Asset Management it is necessary to populate the default values

System Configuration> Administration> Defaults> Asset Tab

Fixed Asset Minimum Balance For Transactions as determined by company policy should be 100

Fixed Asset Minimum Balance For Transactions	
Minimum Balance On Asset For Transactions:	100

Additional Default Setting for Fixed Asset

General Ledger Module> Configuration> General Ledger Accounts

Search the GL Accounts detail relating to the specific fixed asset GL Item

Number Of Years:	5	Number Of Days:	1825
Number Of Months:	60	Percentage Rate:	10

Transaction Type: Journal

Depreciation:
 Activate Journal Schedule: ☒ Journal Process: Automatic
 Asset Account: 1-2210 - Owned Assets - Office Dr
 Residual Value Account: 1-2210 - Owned Assets - Office Dr
 Depreciation Account: 1-2220 - Owned Assets - Office Cr
 Depreciation Exp. Acct.: 6-2450 - General Expenses Dr
 Sales Account: 4-2450 - Sales - General
 COS Account: 5-2850 - Cost of Sales/Purchase

Transaction Period Setup:
 Schedule Every: Month
 Asset Custom Item: +
 Residual Value Item: +
 Depreciation Custom Item: -
 Depreciation Expense Item: +
 Sales Account:
 COS Account:

Tax Reduce:
 Activate Journal Schedule: ☐ Journal Process: Automatic
Transaction Period Setup:
 Schedule Every: Month
 Tax Account: Dr
 Tax Depreciation Account: Cr
 Tax Custom Item: +
 Tax Depreciation Custom Item: -

Branch
Save
Save and New
Save and Close
Close

Creating a Fixed Asset

Fixed Assets are created in two ways in the system. The first way would be via a GRV and the second way would be to create a new Fixed Asset directly in the Asset Management Module.

When creating a Fixed Asset via GRV the Fixed Asset should be part of the inventory system and the serial numbers can be tracked throughout the system.

GRV Method

When producing a GRV that will create a Fixed Asset the GRV line item must be a FixedAsset inventory type and the inventory type must be ticked as a Serial Number Tracking.

One other, requirement is Allow GRV item to Asset Tick box found on:

System Configuration Module> Administration> Company Profile> Advanced Settings

The screenshot shows the 'Edit Company Profile Info' window with the 'Advanced Settings' tab selected. The window has a blue header bar with the title and a close button. Below the header is a toolbar with icons for Attachments, Print, Generic Naming Defaults, and Functions. The main content area is divided into several sections: 'Decimal Places', 'Debtors Settings', 'Job Costing', and 'Support Logs'. The 'Allow GRV Item to Asset' checkbox is highlighted with a red box.

Section	Setting	Value
Decimal Places	Debtors Cost Value:	4
	Creditors Cost Value:	5
	Inventory Cost Value:	4
	Debtors Sell Value:	3
	GL Decimal Values:	6
Debtors Settings	Password Expiry:	Never
	Allow GRV Item to Asset:	☒
	Allow Quote to debtor leads:	☐
Job Costing	Job Invoice Type:	Usage
	Use Template Task:	☐
	Allow to Exceed:	☒
	Process GRV to Job:	☒
	Setup Service Zero Cost:	☐
Support Logs	Block Printing Notes:	☐
	Block SO:	☐

On the GRV line item once the inventory item has been selected and the quantity has been specified click on the create serials button and create the serial numbers as specified on the items being captured

Create Serial Numbers

Search

Add

Remove

Print Grid

Add Subserial Number

Auto Generate

Close

Serial Numbers

Fixed Assets

Serial Number:

Internal Serial Number:

Scan Internal:

☐

Required Serial Numbers: 0

Page 0 of 0

Remove Paging: ☐

No data to display

	#	Serial Number ▲	Internal Serial Number	Sub Serial Number	Residual Value	Brought Into Use Date
☐	1	X006/012			500	2023-01-12
☐	2	X006/013			500	2023-01-12
☐	3	X006/014			500	2023-01-12
☐	4	X006/015			500	2023-01-12
☐	5	X006/016			500	2023-01-12

Save

Close

It is important to ensure that a Brought Into Use Date is created for each serial number created. These dates can be edited on the grid if required. Residual values for serial number can also be captured on the grid at this time.

When GRV has processed the Residual value and Brought Into Use Date will be captured into the Fixed Asset along with all other default data discussed above.

Create Asset Directly in Asset Management

Go to Asset Management Module> Activity> Asset Search

Click on the Add button and capture the necessary details for an Asset.

Please note the system will not allow the duplication of Asset Numbers

Assets created directly will not be linked to any inventory item as a serialised item

All fields with yellow or pink backgrounds are compulsory fields.

Add Asset Item

Asset Item Detail

Attachments Memo Create Reminder Print Detail View Attachments Action: [Dropdown] Close

Asset Fixed Asset Vehicle Register CRM

Main General Info Linked Items Doc Links Asset Action Log Maintenance Custom

Asset No.: [Text Field] [Barcode Icon] Print Return Date: N/A

Asset Name: [Text Field]

Asset Category: [Dropdown Menu: General] **The Asset Category typically defaults to General and the Fixed Asset tab is enabled however for Fixed Assets to be captured this dropdown needs to be set to Fixed Asset otherwise when this Asset Item is next edited the Fixed Asset tab will be disabled blocking access to the Fixed Asset data.**

Issued To: [Text Field: Fixed Asset]

Asset Location: [Text Field: General]

Condition: [Text Field]

Customer: [Text Field] View

Brand: [Text Field]

Make: [Text Field]

Model: [Text Field]

Asset Group: [Text Field]

Link to Parent: [Text Field]

Comment: [Text Field]

Reference: [Text Field]

Description: [Text Field]

Default Image: [Text Field]

Save And New Save And Close Save Close

Asset Management Module

Access the Asset Management Module > Configuration

The items below may require additional entries to satisfy your company requirements.

Asset Management




Configuration

- Debtor Setup
- Supplier Setup
- Inventory Setup
- Unit Of Measure Setup
- Policy Control
- Incident Setup
- Group Code Setup
- Brand Make Model Setup
- Asset Group Setup**
- Asset Action
- Asset Condition
- Asset Location

Asset Group Setup

Code:
Description:
Active: ☒

Page 1 of 1
Remove Paging: ☐

#	Code	Description
1	CEGroup	Computer Equipment Group
2	VehGroup	Vehicle Group
3	SepGroup	September Group
4	FF	Furniture and Fittings
5	OF	Office Furniture

Access the **Asset Management Module -> Activity -> Asset Search**

You will notice that the Serial Numbers captured earlier in the GRV now appear in the Asset Tracker Search as individual Fixed Asset Items.

Asset Tracker Search

Basic Search
Custom Search
Expand

Asset No.: X006
Customer:
Location: All
Status: All

Asset Name:
Employee1: All
Condition: All
Stock Item:

Total Count
174

Total Assets
4

Checked Out
1

Asset Utilization
25 %

Fixed Assets
80

Vehicles
8

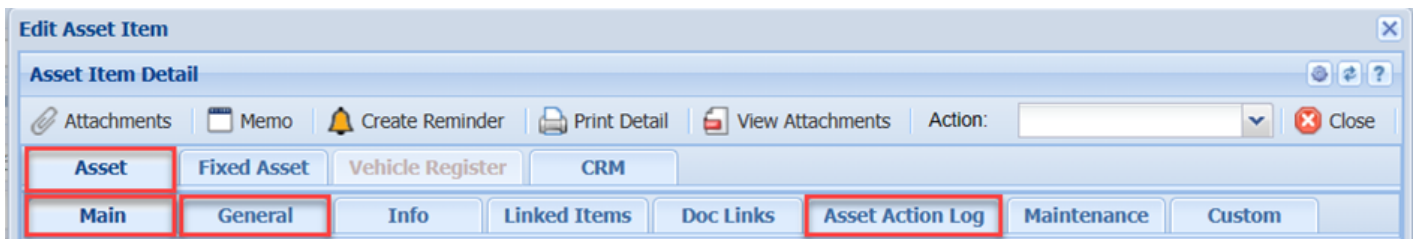
Asset Tracker
Activity Data
Tree View

Page 1 of 1
Remove Paging: ☐

#	Att	Memo	Status	A-Status	Asset No.	Asset Name	Asset Category	Reference	Description
1					X006/012	X006 Stock Item SN	Fixed Asset	Testing Fixed Asset	X006 Stock Item SN
2					X006/013	X006 Stock Item SN	Fixed Asset	Testing Fixed Asset	X006 Stock Item SN
3					X006/014	X006 Stock Item SN	Fixed Asset	Testing Fixed Asset	X006 Stock Item SN
4					X006/015	X006 Stock Item SN	Fixed Asset	Testing Fixed Asset	X006 Stock Item SN
5					X006/016	X006 Stock Item SN	Fixed Asset	Testing Fixed Asset	X006 Stock Item SN

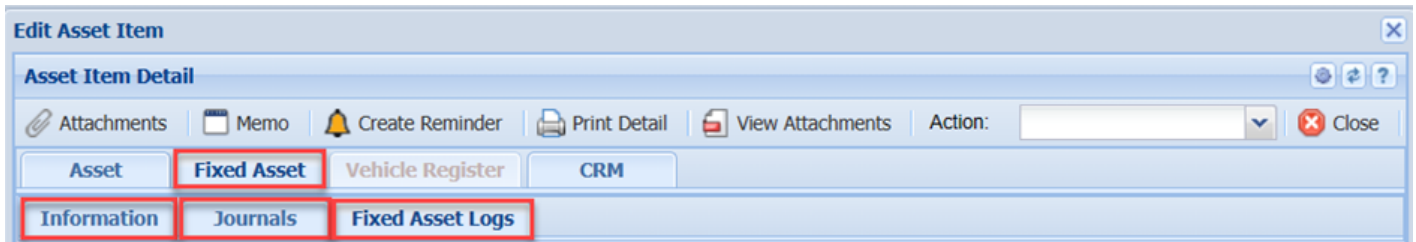
When viewing the Asset Details by selecting and then clicking on the Edit button you will notice that most of the important data has been populated from the various default setups through the GRV processing.

Important Tabs to View When Editing the Asset



The tabs above display the general information about the asset and some of the fields are editable.

The Asset Action Log is a grid displaying all actions that take place against the Asset



The tabs above display the information for dealing with depreciation, selling and disposing assets

The Fixed Asset Log is a grid displaying all the financial transactions that are created against the particular asset starting with GRV which was processed to created an Asset

Fixed Asset Tab> Information

Edit Asset Item

Asset Item Detail

Attachments
Memo
Create Reminder
Print Detail
View Attachments
Action:
Close

Asset
Fixed Asset
Vehicle Register
CRM

Information
Journals
Fixed Asset Logs

Sell Asset
Write Off
Create ADHOC Journal
Take On Depreciation
Take On Asset

Asset No.: X006/012
Asset Name: X006 Stock Item SN
Purchase Date: 2023-01-12
Supplier Purchased: REC001 - Rectron
Brought Into Use: 2023-01-12
Supplier Inv. No.: Testing Fixed Asset
Purchase Value: 500
GRV No.: GRV391242
Residual Value: 100
Fixed Asset Type: Straight Line
New Carrying Value: 400
GL Account: 1-2210 - Owned Assets - Office Equipment: Co
Years Remaining: 5
Number Of Years: 5
Months Remaining: 60
Number Of Months: 60
Days Remaining: 1825
Number Of Days: 1825
Min. Balance Value: 100
Percentage Rate: 10

Save And New
Save And Close
Save
Close

Available

Brought Into Use Date	Is the day from which the first depreciation will be calculated
Fixed Asset Type	The type of depreciation to be applied to this asset (Straight line or Reducing line)
Percentage Rate	The percentage depreciation to be calculated at each period. This can be monthly or annually

Fixed Asset> Journals

Edit Asset Item

Asset Item Detail

Attachments Memo Create Reminder Print Detail View Attachments Action: Close

Asset Fixed Asset Vehicle Register CRM

Information Journals Fixed Asset Logs

Transaction Type: Journal

Depreciation:

Activate Journal Schedule: Journal Process: Automatic

Asset Account: 1-2210 - Owned Assets - Office Dr
Residual Value Account: 1-2210 - Owned Assets - Office Dr
Depreciation Account: 1-2220 - Owned Assets - Office Cr
Depreciation Exp. Acct.: 6-2450 - General Expenses Dr
Sales Account: 4-2450 - Sales - General
COS Account: 5-2850 - Cost of Sales/Purchase

Transaction Period Setup:

Scheduled every: Month

Asset Custom Item:
Residual Value Item:
Depreciation Custom Item:
Depreciation Expense Item:
Sales Account:
COS Account:

Tax Reduce:

Activate Journal Schedule: Journal Process: Automatic

Transaction Period Setup:

Scheduled every: Month

Tax Account:
Tax Depreciation Account:
Tax Custom Item:
Tax Depreciation Custom Item:

Save And New Save And Close Save Close

Available

Transaction Type: Journal or GRV is still under development

Activated Journal Schedule	Ticked - Will be selected in the Fixed Asset Depreciation Schedule which will run at a predetermined time as specified in the Fixed Asset Depreciation Setup. Unticked- Will be ignored by the fixed Asset Depreciation Schedule.
Journal Process	Automatic - The subsequently created depreciation journal will be automatically processed. Manual - The subsequently created depreciation journal will remain in a preparation status to be in General Ledger Module> Activity> GL Journal and click on the search button
Asset Account ect	These are all pre-defined accounts required for the various transactions that will take place against this asset item. e.g Depreciation, Selling, Disposing and ADHOC Journal Transactions.

Fixed Asset Depreciation Setup

Depreciation Transactions

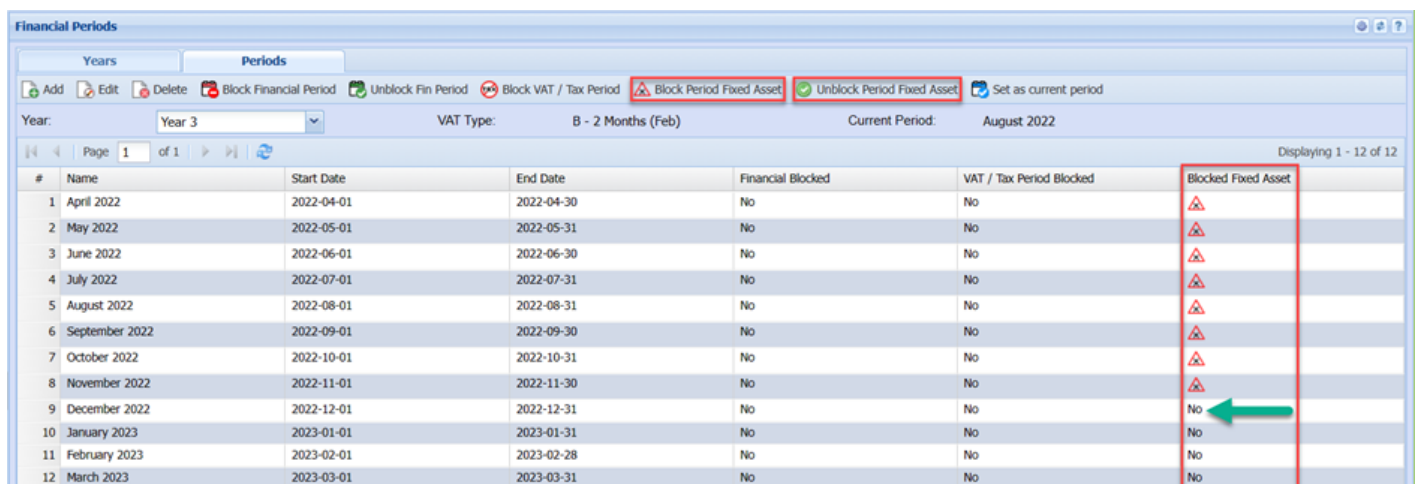
Depreciation transactions require the following setup:

Financial Period	Block Period Fixed Asset
Schedule Setup	Activate Fixed Asset Depreciation Schedule

Block Period Fixed Asset

System Configuration > Administration > Financial Periods Setup

Select the year then click on the periods tab to display all the Financial Periods that have been set up for the selected year



#	Name	Start Date	End Date	Financial Blocked	VAT / Tax Period Blocked	Blocked Fixed Asset
1	April 2022	2022-04-01	2022-04-30	No	No	△
2	May 2022	2022-05-01	2022-05-31	No	No	△
3	June 2022	2022-06-01	2022-06-30	No	No	△
4	July 2022	2022-07-01	2022-07-31	No	No	△
5	August 2022	2022-08-01	2022-08-31	No	No	△
6	September 2022	2022-09-01	2022-09-30	No	No	△
7	October 2022	2022-10-01	2022-10-31	No	No	△
8	November 2022	2022-11-01	2022-11-30	No	No	△
9	December 2022	2022-12-01	2022-12-31	No	No	No
10	January 2023	2023-01-01	2023-01-31	No	No	No
11	February 2023	2023-02-01	2023-02-28	No	No	No
12	March 2023	2023-03-01	2023-03-31	No	No	No

The Block Fixed Asset Column:

Select the period and then click the Block Period Fixed Asset. The system works as follows, when the Fixed Asset Depreciation Schedule runs the system will search for the first unblocked period the use the date for this period e.h 2022-12-01 to 2022-12-31 for the date range for calculating the depreciation amount for the Month/ Year for each fixed asset selected in the process. In the case of the first depreciation transaction, the system will calculate the number of days from the Brought Into Use Date to the end of the Month/Year and calculate the depreciation accordingly. As soon as the system detects a difference Blocked Fixed Asset period e.g. the month the system will calculate depreciation for all the selected Fixed Assets for the next month.

In the event of bringing in a new asset with a backdated Brought Into Use Date it will be necessary to select the period corresponding to the date range of the period and then click Unblock period Fixed Asset. When the Fixed Asset Depreciation Schedule next runs the system will create the necessary depreciation transaction for the period for the Fixed Asset. It might be necessary to repeat this several times the backdated Brought Into Use Date was several periods before the last blocked period.

Remember to block all the periods again to get back to the original blocked fixed asset status in the Blocked Fixed Asset Column

To aid in blocking previous year’s Fixed Asset Periods. Select the Year on the Year Tab then click on the Block Fixed Asset Year to block an entire year.

Financial Periods

Years

Periods

Add

Create New Year

Edit

Delete

Block Financial Year

Functions

Recreate Periods

Unblock Financial Year

Block Fixed Asset Year

Displaying 1 - 8 of 8

#	Name	Start Date	End Date	Financial Blocked
1	Year 8	2027-04-01	2028-03-31	No
2	Year 7	2026-04-01	2027-03-31	No
3	Year 6	2025-04-01	2026-03-31	No
4	Year 5	2024-04-01	2025-03-31	No
5	Year 4	2023-04-01	2024-03-31	No
6	Year 3	2022-04-01	2023-03-31	No
7	Year 2	2021-04-01	2022-03-31	No
8	Year 1	2020-04-01	2021-03-31	No

Activated Fixed Asset Depreciation Schedule

System Configuration> Administration> Company Profile

Select the company on the grid and click on the Edit button

Click on the Advanced settings and the Schedule setup button

Edit Company Profile Info

Attachments Print

Basic Settings

Settings GL L

Decimal Places

Debtors Decimal:

Creditors Decimal:

Inventory Decimal:

Debtors Settings

Password Expiry:

Allow GRV Item to Asset:

Allow Quote to debtor leads:

Block SO:

Manage Task Scheduling

Schedule Setup

Days Prior: 3 Days

VAT Category:

Tax Reporting Method:

Save Close

Scheduled Tasks Search

Add Schedule Edit Schedule Delete Schedule View Schedule Tasks Log Start Schedule Stop Schedule

Page 1 of 1

Displaying 1 - 35 of 35

#	Task Name	Task Code	Active	Status	Email List	Recipients	Run Now
1	API Stock import	API Stock import		Has not been schedul...		0	
2	Auto Badger Import	Auto Badger Import		Has not been schedul...		0	
3	Below Max Level Report	Below Max Level Report		Has not been schedul...		0	
4	Below Min Level Report	Below Min Level Report		Currently Suspended		0	
5	Cancel Expired Quotes	Cancel Expired Quotes		Has not been schedul...		0	
6	Cancel TrackIT Warranty	Cancel TrackIT Warranty		Has not been schedul...		0	
7	Check PO To GRV Intervals	PO_GRV		Has not been schedul...		1	
8	Check PO To GRV Intervals	PO_GRV		Has not been schedul...		0	
9	Creditors Payment Batch Update	Creditors Payment Batch Update		Has not been schedul...		0	
10	Daily Inventory Valuation Report	Daily Inventory Valuation Report		Has not been schedul...		2	
11	Daily Stock Control Report (WIP ...	Daily Stock Control Report (WIP ...		Has not been schedul...		0	
12	Daily Time Log Figures	Daily Time Log Figures		Has not been schedul...		1	
13	Daily WIP Journal	Daily WIP Journal		Has not been schedul...		0	
14	Debit Order pending message	Debit Order pending message		Has not been schedul...		0	
15	Email Daily Reminders	Email Daily Reminders		Has not been schedul...		0	
16	Email In Progress Sales Leads Al...	Email In Progress Sales Leads Al...		Has not been schedul...		0	
17	Email Open Service Requests	Email Open Service Requests		Has not been schedul...		0	
18	Emailing Schedule	Emailing Schedule		Currently Suspended		1	
19	Escalate outstanding reminders	Escalation of Reminders		Has not been schedul...		0	
20	Exchange Rate Update Fixer	Exchange Rate Update Fixer		Currently Suspended		0	
21	Export Schedule	Export Schedule		Currently Suspended		1	
22	Fixed Asset Depreciation Schedule	Fixed Asset Depreciation Schedule	Yes	Currently Running.		1	
23	Recurring GL Journal Auto Proces...	Recurring GL Journal Auto Proces...		Has not been schedul...		0	

Close

Select Fixed Asset Depreciation Schedule then click on the Edit Schedule button.

This is a typical Schedule Task Setup. The task will run Once a Day at Midnight every day of the week.

×

Schedule Task Setup

Task Code:

Fixed Asset Depreciation Schedule

Task Description:

Fixed Asset Depreciation Schedule

Task To Be Executed:

##class(AssetTracker.AssetTrackerDetail2).Depreciation Transaction(44)

Run Task:

☒ Once A Day

☐ More Than Once a Day

☐ Time Period Setup

Schedule Time:

00

▼

Hrs

00

▼

Min

Schedule Days:

Sun: ☒

Mon: ☒

Tue: ☒

Wed: ☒

Thu: ☒

Fri: ☒

Sat: ☒

Save

Close

Ensure that there is a number here between the brackets. If the number is missing click the Save button then the Close button then the Edit Schedule button again.

Status Column	Ensure on the selected scheduled task that the Status column is set to Currently Running If not click on the Start Schedule button The status should now read Currently Running.
Recipients Column	This column indicates the number of users that have been selected to receive the generated email report when the schedule has been run

Select Users

Available Users

Page 1 of 1

#	User Name
1	Acck - Support (malcolm@stormtr...
2	Arlecia - van Rooyen (gerrit@weba...
3	Chris - Stone (chris@stormtrader.c...
4	Gerrit - van Rooyen (gerrit@weba...
5	Harry - Jones (h.jones@anywhere...
6	Imraan - Saljee (imraan@hugesof...
7	Imraan - Saljee (imraan@hugesof...
8	Malcolm - Granville (malcolm@sto...
9	Otsile - Loate (otsile@hugesoftwa...
10	Paige - Granville (paige@webacco...
11	Peter - Smit (peter@webaccountin...

Selected Users

Page 1 of 1

#	User Name
1	Andrew - Skene (andrew@hugesoft...

Close

To add or remove Email recipients click on the Email icon in the Email List column.

Run Now Column

To run the Schedule manually select the Fixed Asset Depreciation Schedule entry and then click on the green arrow icon.

Run Task Now?

Are you sure you want to run this task now?

Please Note :
The time taken to complete the task will depend on the size and complexity of the selected task.

Yes No

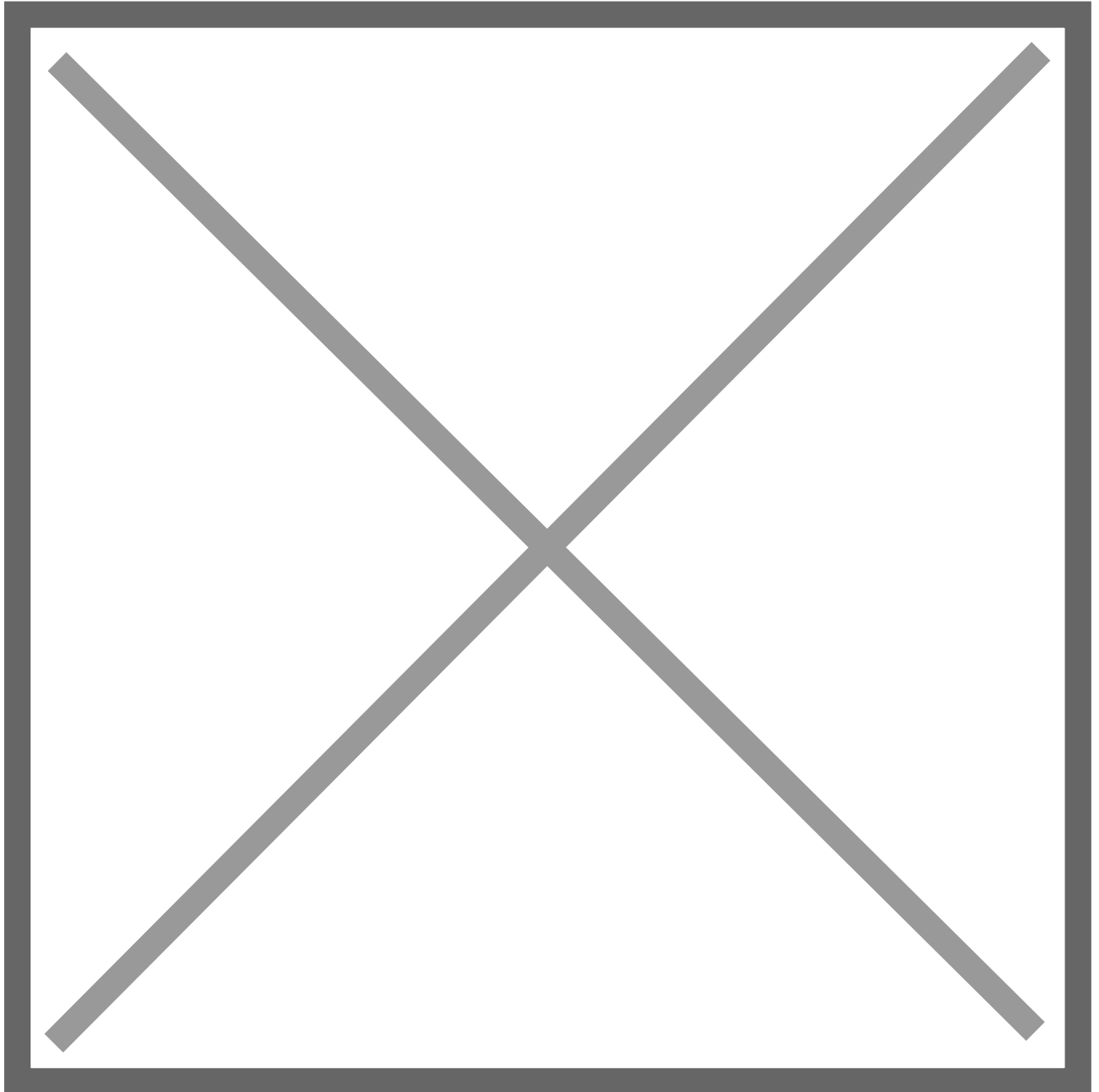
And respond accordingly.

Vehicle Register

Vehicle Register

Vehicle Register

This is a search option that searchers for assets that have been flagged as a vehicle



Asset Actions

Asset actions

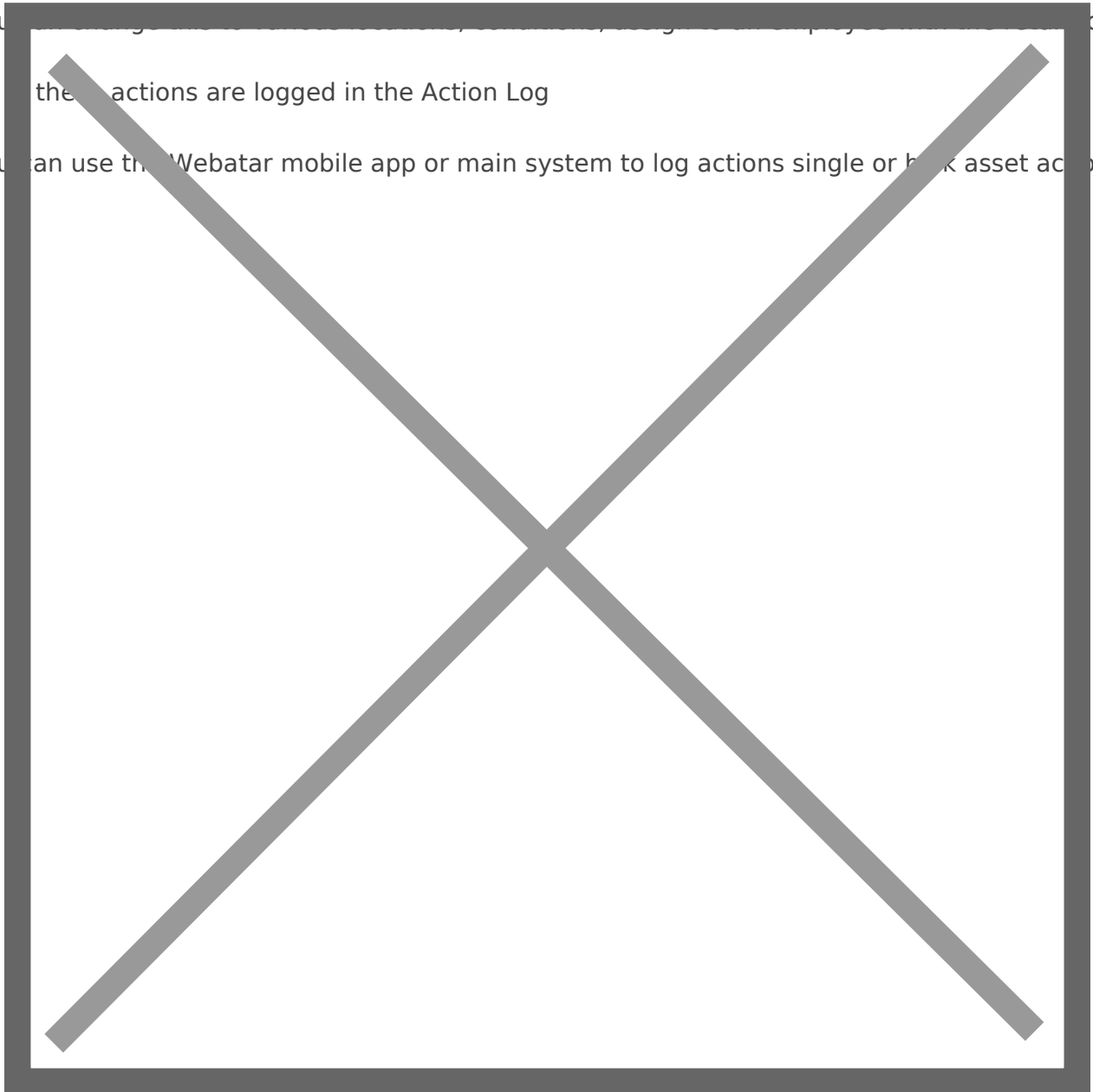
Create various actions against the fixed asset item.

This will change the status and state of the item.

You can use the Webatar mobile app or main system to log actions single or bulk asset actions

All the actions are logged in the Action Log

You can use the Webatar mobile app or main system to log actions single or bulk asset actions



Fixed Asset Audit

Fixed Asset Audit

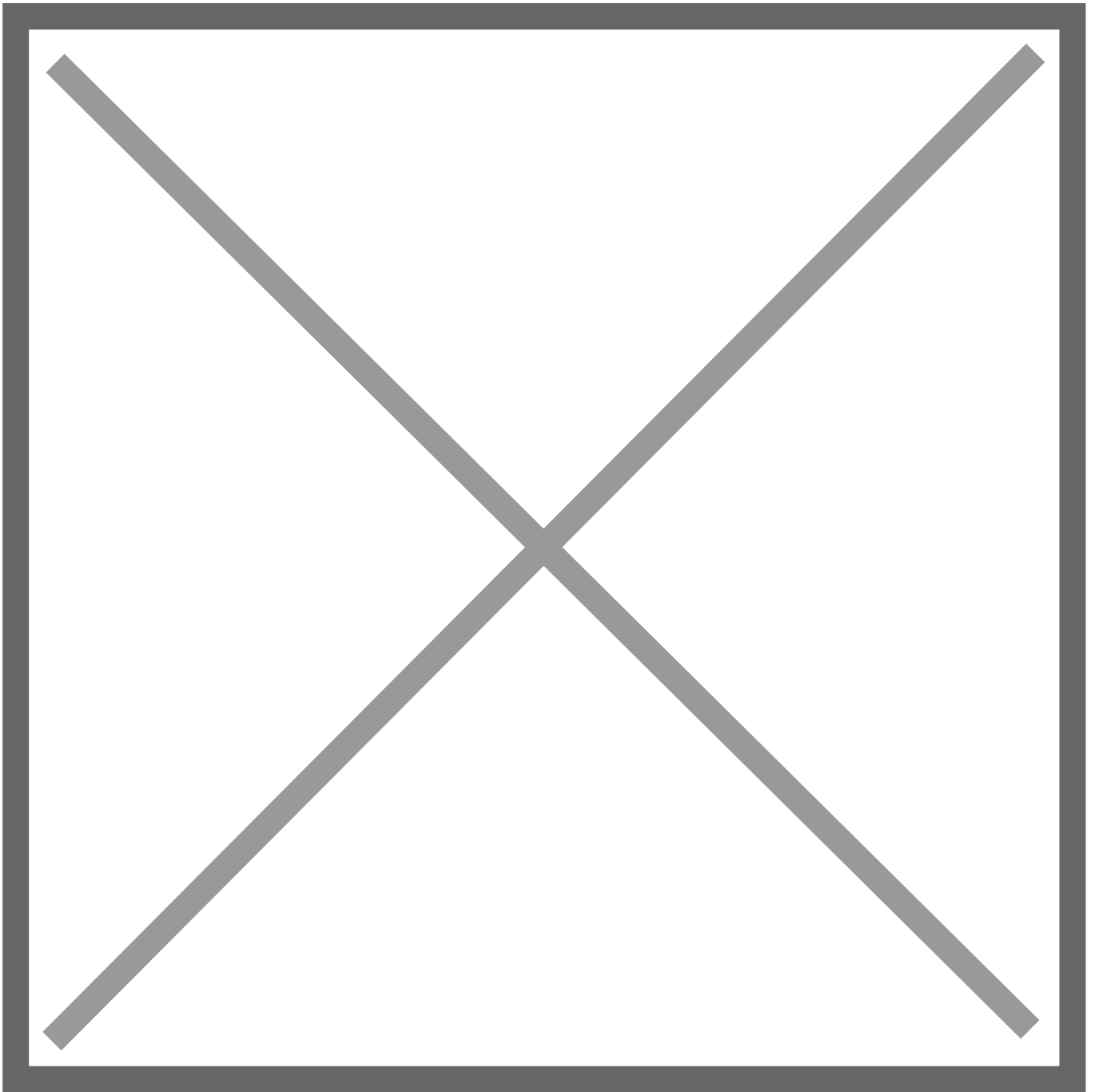
Create an audit on your fixed assets

The audits can be created by

1. Location
2. Assign To
3. Condition
4. Brand
5. Customer

Audits are divided into two types of audits

1. Standard audit
2. Blind audit



Standard audit

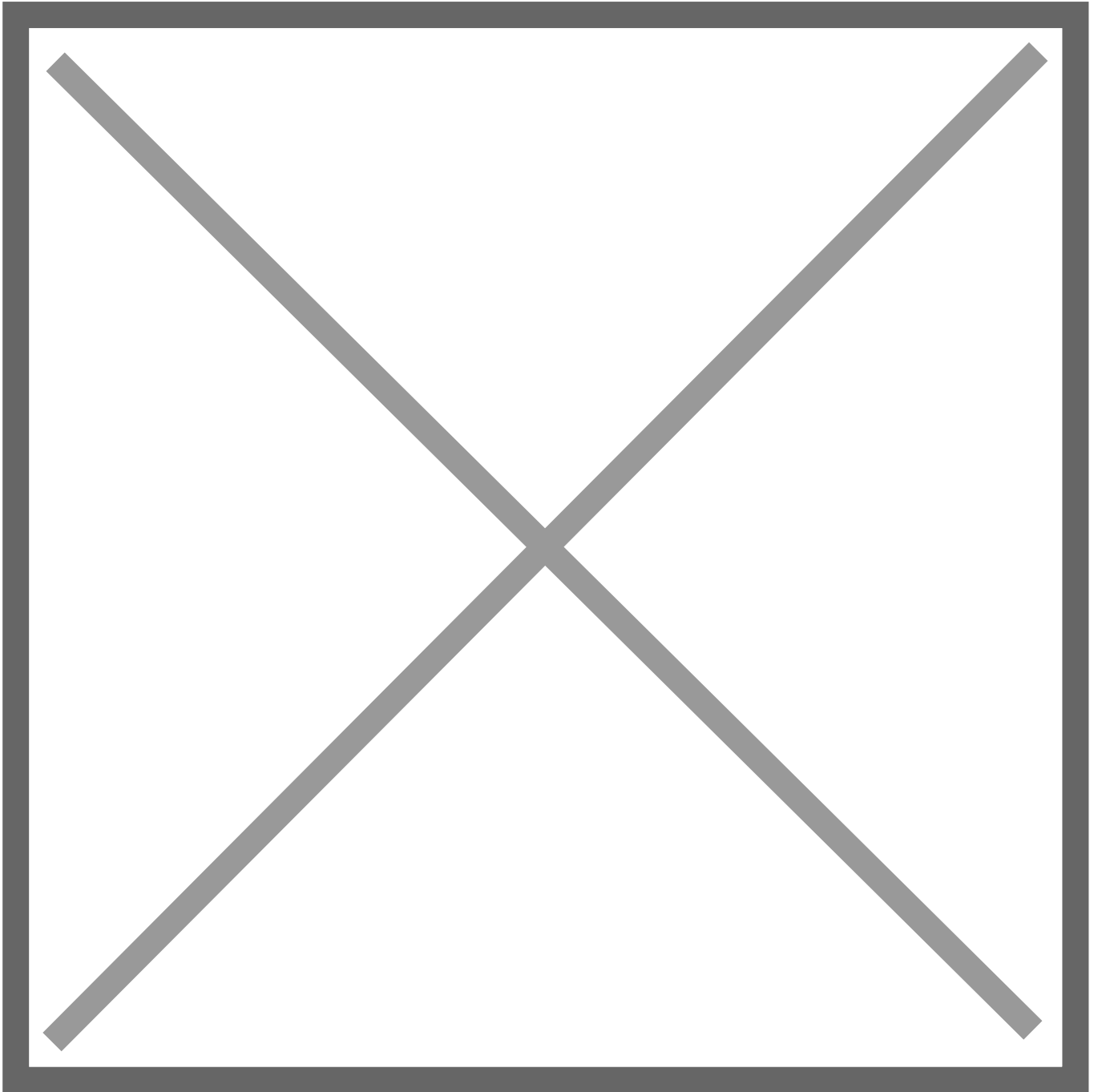
Create a standard audit which will allow you to check assets within a location as an example.

It will list the assets and flag them to indicate that they are audited

Blind audit

Allows you to scan all the assets in the area without knowing what is actually in the area.

One then will verify the blind audit, to what was in the area.

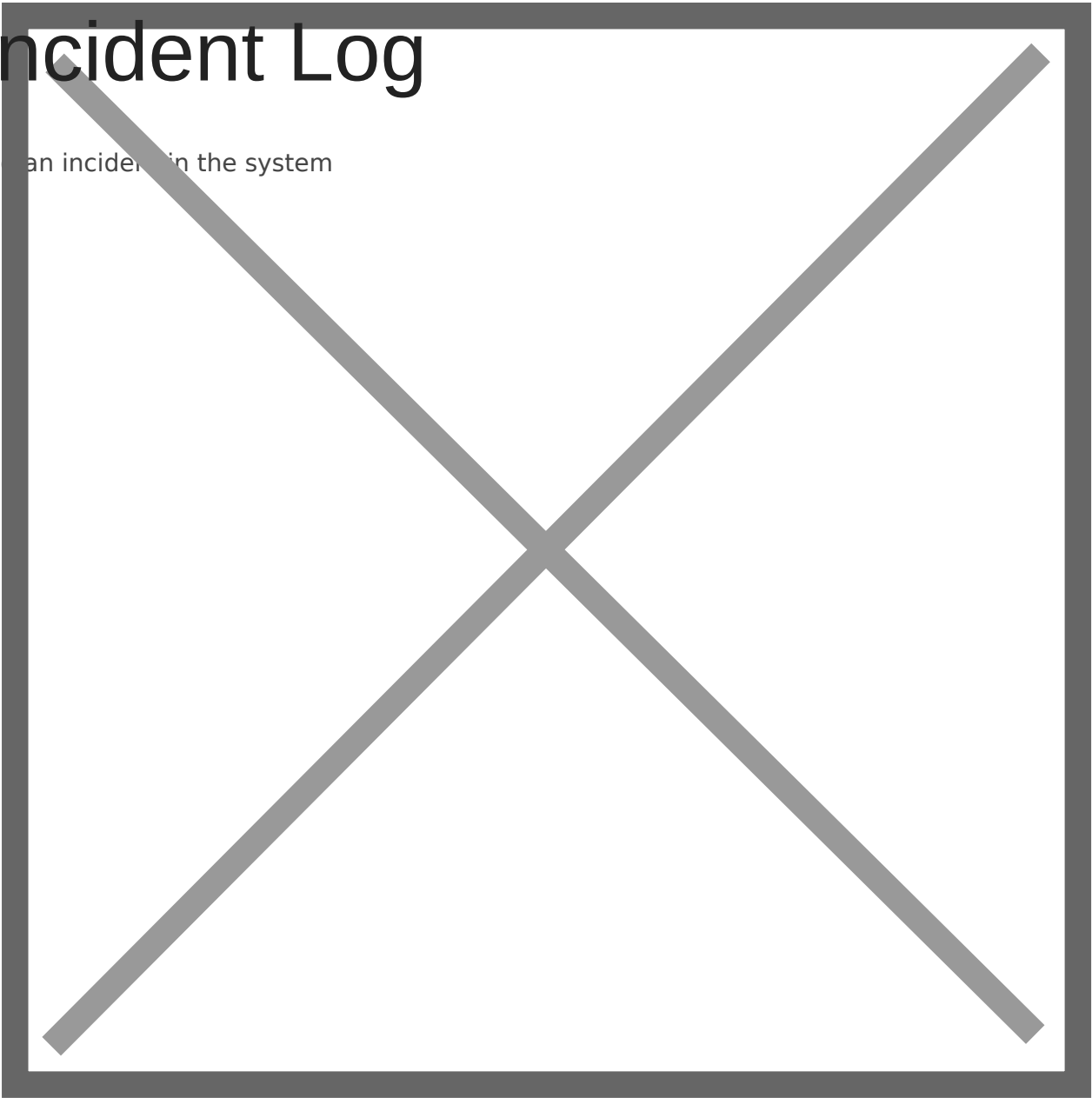


Incident Log

Incident Log

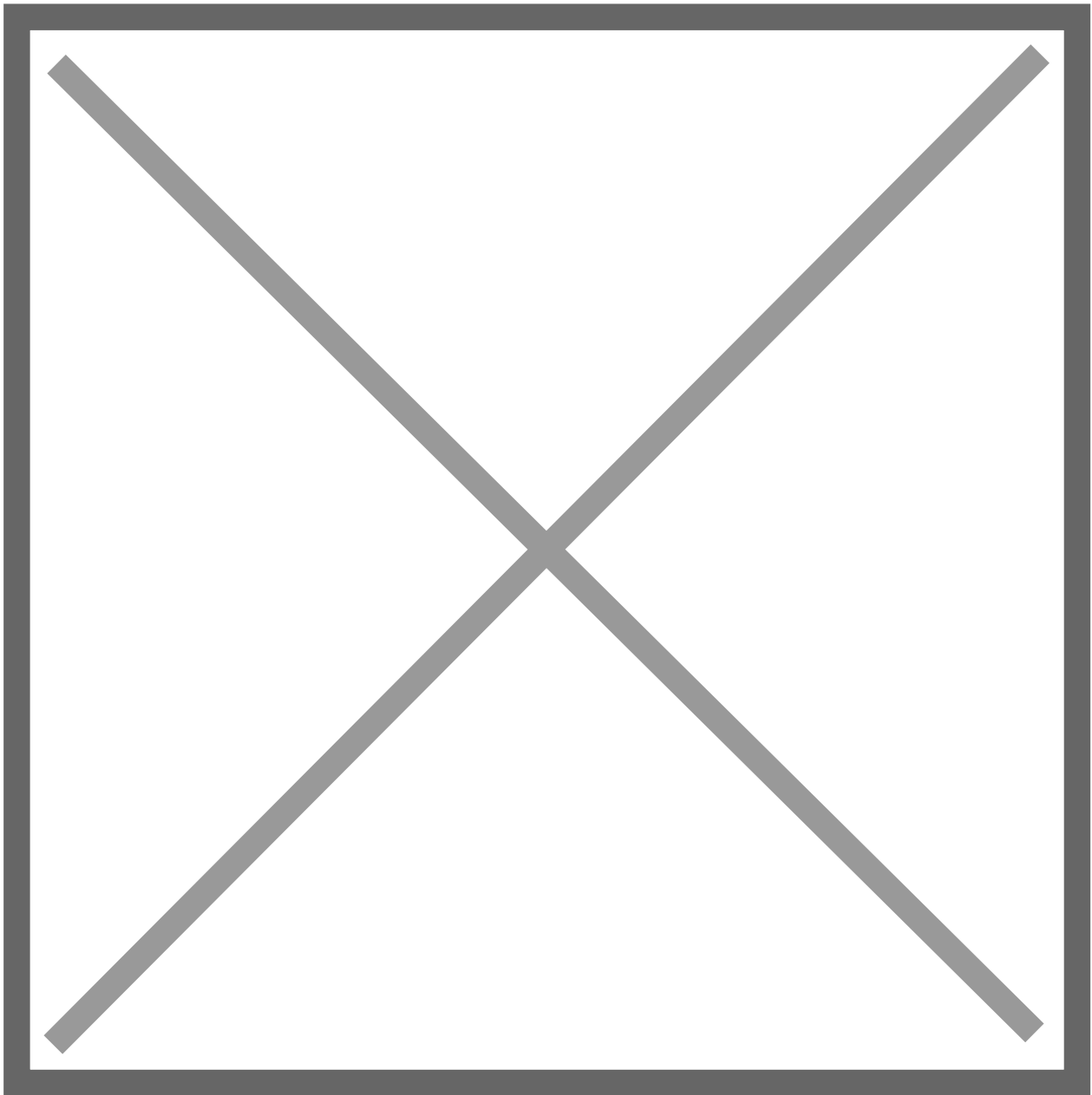
Incident Log

Log an incident in the system

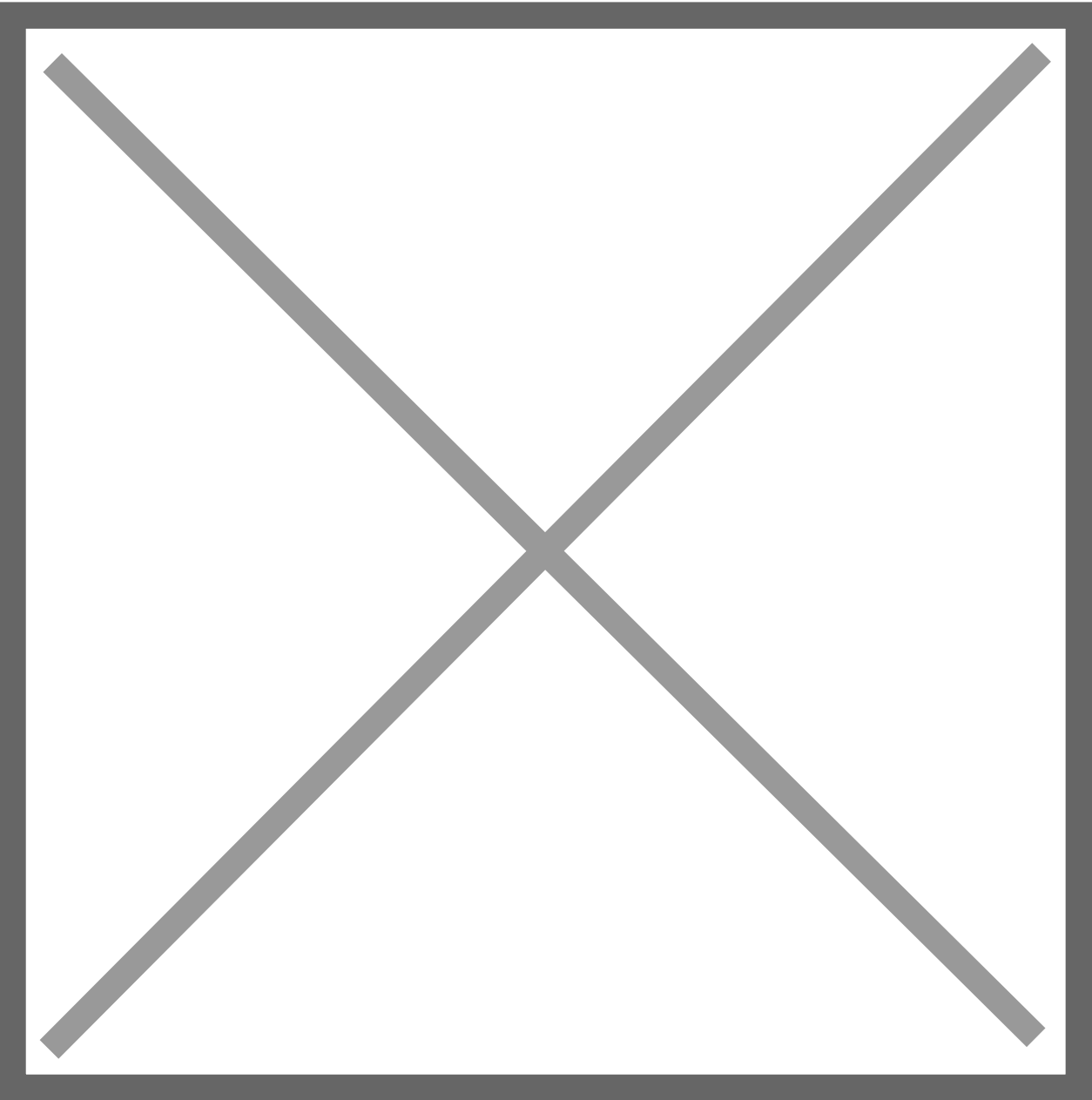


Add a new incident

Fill in all the necessary information on the incident



User setup will show an incident has occurred on the user for a period of time



Asset Maintenance Schedule

Maintenance Schedule

Asset Tracker

Configuration

Activity

Asset Tracker

Asset Maintenance Schedule

Vehicle Register

Fixed Asset Audit

Mobile Asset Audit

Document Management

Incident Log Search

Maintenance Schedule

Search

Checked

Support Log

Print Grid

User: All

Status: All

Document No.:

Description:

Date From:

Date To: 2024-09-05

Remove Paging:

#	Status	Due	Doc. No.	Asset No.	Asset Name	Frequency	Date	Description	Action No.	Action	Checked By	User	Comments
1	✖	📅	MS5	A1000502	Serial number it...	Monthly	2022-10-19	Check item for ...		Available		Andrew Skene	
2	✖	📅	MS5	A1000502	Serial number it...	Monthly	2022-11-21	Check item for ...		Available		Andrew Skene	
3	✔	📅	MS7	A1000502	Serial number it...	Quarterly	2022-10-19	Quarterly Inspe...	AL318	Available	Andrew Skene	Andrew Skene	
4	✔	📅	MS7	A1000502	Serial number it...	Quarterly	2023-01-19	Quarterly Inspe...	AL1404	Available	Paige Granville	Andrew Skene	
5	✔	📅	MS8	A1000502	Serial number it...	Six Monthly	2022-10-19	Six Monthly Ser...	AL317	Available	Andrew Skene	Andrew Skene	
6	✔	📅	MS8	A1000502	Serial number it...	Six Monthly	2023-04-19	Six Monthly Ser...	AL1350	Available	Otsile Loate	Andrew Skene	
7	✔	📅	MS11	X010/003	X010 Fixed Asset	Weekly	2022-10-19	Scheduled Chec...	AL308	Available	Andrew Skene	Andrew Skene	Check Wheels
8	✖	📅	MS11	X010/003	X010 Fixed Asset	Weekly	2022-10-26	Scheduled Chec...		Available		Andrew Skene	
9	✔	📅	MS12	X010/003	X010 Fixed Asset	Weekly	2022-10-19	Scheduled Chec...	AL309	Available	Andrew Skene	Andrew Skene	Check all seals
10	✖	📅	MS12	X010/003	X010 Fixed Asset	Weekly	2022-10-26	Scheduled Chec...		Available		Andrew Skene	
11	✖	📅	MS13	X010/003	X010 Fixed Asset	Weekly	2022-10-19	Scheduled Chec...		Available		Andrew Skene	Inspect all lamps
12	✖	📅	MS13	X010/003	X010 Fixed Asset	Weekly	2022-10-26	Scheduled Chec...		Available		Andrew Skene	

Mobile Asset Audit

Mobile Asset Audit

Asset Tracker



Configuration

Activity

Asset Tracker

Asset Maintenance Schedule

Vehicle Register

Fixed Asset Audit

Mobile Asset Audit

Document Management

Incident Log Search

Mobile Asset Audit

Search

Print Audit

Print Results

Batch No:

Completion:

Description:

Date From:

Asset Name:

Audit Location:

Audit Type:

Line Status:

Date To:

Asset Number:

Audited By:

Asset Location:

Page 0 of 0

Remove Paging:

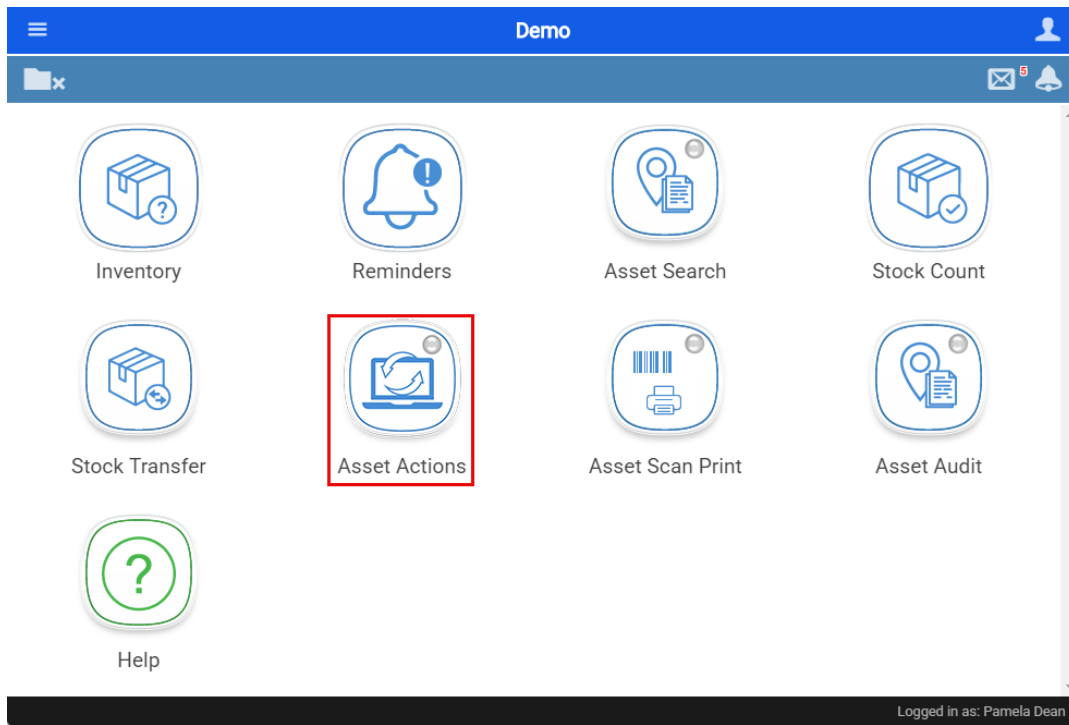
#	Audit Type	Completion	Batch No	Audit Description	Captured	Asset Name
---	------------	------------	----------	-------------------	----------	------------

WOF and Car Services Items

Checking a Vehicle in and Out for a WOF or Service

Use the Webatar app on any android mobile device to log Actions against a specific Asset (Car)

Webatar App> Asset Tracker> Asset Action



1. Select the Action you would like to log (eg: Book a vehicle in for a service or a WOF)
2. Select your location
3. Search for the asset using the Assets unique item code
4. Then click sync to server

Asset Actions

Scanned Items

Issue By:

Pamela Dean

Action:

Book In 1

Issue To:

Pamela Dean

Location:

Christchurch 2

Condition:

Not Selected

Return Date:

N/A

Reminder

No

Description:

Next

Send To Server [1] 4

Logged in as: Pamela Dean

GL9656 3

#1

GL9656

2025-06-25 12:53

Book In

Updating the WOF, REGO and Service Date

1. Select the Action you would like to log (eg: Book a vehicle in/out for a service or a WOF)
2. Select your location
3. Search for the asset using the Assets unique item code
4. Click on the blue icon



Asset Actions

Scanned Items

Issue By:

Pamela Dean

Action:

Book In 1

Issue To:

Pamela Dean

Location:

Christchurch 2

Condition:

Not Selected

Return Date:

N/A

Reminder

No

Description:

Next

Send To Server [1]

Logged in as: Pamela Dean

GL9656 3

#1

GL9656

2025-06-25 12:53

Book In

4

Select the Yellow Icon with the Car



	Opens Action Options
	Add Measurements
	Add Vehicle Service Details
	Add Photos
	Add Notes
	Delete Action

Update the Service, WOF and/or the REGO details by selecting today's date and then select how many months from today's date the WOF. Service or Rego will be due. This can be sent up to send out an email reminder to the customer reminding them of this.

- Click "confirm"


Vehicle Service
Reset

#1

GL9656

2025-06-25 12:53

Book In

Type of Service:

Logged KM:

-

+

Next WOF Date:

Months Ahead:

dd/mm/yy

-

+

Next Service Date:

Months Ahead:

dd/mm/yy

-

+

Next Reg Date:

Months Ahead:

dd/mm/yy

-

+

Confirm

This will then create a Log for Action taken and will update the Due dates for the next WOF, Service or REGO.

Asset Module> Activity> Asset Tracker

Double click to open the asset up

Edit Asset Item

Asset Item Detail

Attachments Memo Create Reminder Print Detail View Attachments Action: Close

Asset Fixed Asset **Vehicle Register** CRM

Basic Tool Reg Fire & First Aid KM Log **Service Dates**

Search Add Edit Delete

Page 1 of 1 Displaying 1 - 2 of 2

#	Type Of Service	Reminder	Date	Date Logged	Time Logged	By Who
1	General Service		2025-06-25	2025-06-25	09:33:17	Malcolm Granville
2	Pre inspection r...		2022-09-27	2022-09-27	12:49:42	Malcolm Granville

Edit Asset Item

Asset Item Detail

Attachments Memo Create Reminder Print Detail View Attachments Action: Close

Asset Fixed Asset **Vehicle Register** CRM

Basic Tool Reg Fire & First Aid KM Log **Service Dates**

Rego No: FORD123 KM Date: 2025-06-27
 Description: Ford Ranger Asset: GL9656 - Ford Ranger Red
 Driver: Malcolm Granville Year: All
 Reg Date: 2025-08-27 Engine No: ENG987654321
 Next Service: 2025-12-27 VIN No: VIN1234567
 WOF Date: 2025-12-27 Chassis No:

Save & New Save & Close Save Close

Vehicle Service

You can find a full log

Asset Module> Activity> Asset Tracker

Asset - Asset Action Log

Edit Asset Item

Asset Item Detail

Attachments

Memo

Create Reminder

Print Detail

View Attachments

Action:

Close

Asset

Fixed Asset

Vehicle Register

CRM

Main

General

Info

Linked Items

Doc Links

Asset Action Log

Maintenance

Units Logged

Custom

Search

View

Print Grid

Action:

All

Condition:

All

Page 1 of 1

Remove Paging:

Displaying 1 - 48 of 48

#	Att	Memo	A-Status	Action Date Tir	Log No	Action	Asset Number	Asset Name	Description	Issued To	Location	Condition	Return Date
1				2025-06-25...	AL705	Check Out	GL9656	Ford Ranger Red	Check Out – Co...	Malcolm Granville	Christchurch		2025-07
2				2025-06-25...	AL704	Check In	GL9656	Ford Ranger Red	Check In – Count	Malcolm Granville	Christchurch		
3				2024-07-24...	AL505	Audit	GL9656	Ford Ranger Red	Audit 2024-05-22		Unassigned		
4				2024-02-23...	AL464	Check In	GL9656	Ford Ranger Red	Check In	Malcolm Granville	Palmerston		2024-02
5				2024-02-23...	AL463	Check Out	GL9656	Ford Ranger Red	Check Out	Malcolm Granville	Palmerston		
6				2024-01-18...	AL412	Audit	GL9656	Ford Ranger Red	Audit 2024-01-17		Unassigned		
7				2024-01-09...	AL385	Audit	GL9656	Ford Ranger Red	Audit 2024-01-09		Unassigned		
8				2023-05-24...	AL300	Field Transfer	GL9656	Ford Ranger Red	Field Transfer	Malcolm Granville	Christchurch		2023-05
9				2023-05-24...	AL299	Perform Main...	GL9656	Ford Ranger Red	Perform Mainte...	Craig B	Auckland	Damaged	2023-06
10				2023-04-18...	AL277	Move Asset	GL9656	Ford Ranger Red	Move Asset				2023-04
11				2023-04-18...	AL275	Repair works...	GL9656	Ford Ranger Red	Repair workshop	Malcolm Granville	Palmerston	Damaged	
12				2023-04-18...	AL276	Repair works...	GL9656	Ford Ranger Red	Repair workshop	Malcolm Granville	Palmerston	Damaged	
13				2023-04-04...	AL267	Check Out	GL9656	Ford Ranger Red	Check Out				
14				2023-04-04...	AL266	Check Out	GL9656	Ford Ranqer Red	Check Out				

Save & New

Save & Close

Save

Close

Check Out

Adding Automated Letter for WOF and Car Services

Setup the various action Letter that can occur against an Asset

Asset Module> Configuration> Email Letter Templates> Add

Asset Tracker

Configuration

Debtors Setup

Creditors Setup

Incident Setup

Brand Make Model Setup

Asset Group Setup

Asset Action

Asset Condition

Asset Location

Issue To Users

Email Letter Templates

Email Template Letters

Search

Add

Edit

Delete

Print

Code:

Description:

Active:

Email Type:

All

Page 1 of 1

Remove Paging:

#	Code	Description	Type	Active	Return Date
1	SAMPLE-OUT	Thanks for Visiting Our Showroom – Let's Make Your Flooring Dreams a Reality!	Action Letter	Yes	
2	SAMPLE-RETURN	Thanks for Returning our samples – Let's Make Your Flooring Dreams a Reality!	Action Letter	Yes	
3	imagetestcms	testing the image uploading	Action Letter	Yes	
4	WOF Due Letter 7days	WOF Due Letter 7days	WOF Letter	Yes	
5	Service Due Letter	Service Due Letter	Registration Letter	Yes	
6	Service Vehicle In	Service Vehicle In	Action Letter	Yes	
7	Service Vehicle finished	Service Vehicle finished	Action Letter	Yes	

This could be used for:

- When the Car is due for a Service or a WOF

- When the Car is booked in
- Sending a reminder for a WOF or Service due soon
- When the car is booked in for the actual service
- When the service or WOF is complete, and the car is ready to be picked up etc...

Add a code and Description for your letter

Select the type of action

The screenshot shows the 'Edit Email Letter' window. A red box highlights the top section where the letter's metadata is defined. The 'Code' field is set to 'Service Vehicle In', and the 'Active' checkbox is checked. The 'Description' field also contains 'Service Vehicle In'. The 'Type' dropdown menu is open, showing options: 'Action Letter' (selected), 'Return Date Letter', 'WOF Due', 'Vehicle Registration Due', and 'Vehicle Service Due'. The 'Event Date Set' field is empty, and the 'No of Days' field is set to 0. Below the dropdown, there are icons for bold (B), italic (i), and align left (A). The main body of the letter contains a template with placeholders for customer and business information. The bottom of the window has 'Save & Close', 'Save', and 'Close' buttons.

Edit Email Letter

Code: Service Vehicle In Active: ☒

Description: Service Vehicle In

Type: Action Letter

Event Date Set: No of Days: 0

B i A

Dear [Customer's Name],

Thank you for dropping off your vehicle with us. We're writing to confirm that your service booking has been received, and your vehicle is now in our care.

Our team will carry out the scheduled work as discussed, and should we identify anything additional during the inspection, we'll be in touch to advise before proceeding.

We appreciate you choosing [Your Business Name], and we'll contact you as soon as your vehicle is ready for collection.

Kind regards,
 [Your Name]
 [Your Business Name]
 [Contact Details]

Characters : 527

Save & Close Save Close

Adding Actions

Asset Module> Configuration> Asset Action

Asset Tracker

Configuration

- Debtors Setup
- Creditors Setup
- Incident Setup
- Brand Make Model Setup
- Asset Group Setup
- Asset Action**
- Asset Condition
- Asset Location
- Issue To Users
- Email Letter Templates

Fixed Asset Action Setup

Search

Add

Edit

Delete

Print Grid

Code:

Description:

Active:

☒

Page 1 of 1

#	Sequence No.	Status	Code	Description	Action	State	Active	Show Return Date	Allow Next Action	Next Action
1	1	Available	Available	Available	Log Action	In	Yes			
2	2	Check In	Check In	Check In	Log Action	In	Yes			
3	2.5	CHK_AVAIL	Check in and then available	Check in and then available	Log Action	In	Yes		Yes	Available
4	3	Check Out	Check Out	Check Out	Log Action	Out	Yes	Yes		
5	3.5	VEH/SERV	Vehicle Service	Vehicle Service	Log Action	In	Yes			
6	4	Reserve	Reserve	Reserve	Log Action	Pending	Yes			
7	5	Request	Request	Request	Log Action	Pending	Yes			
8	6	Report Damage	Report Damage	Report Damage	Log Action	Pending	Yes			
9	7	Repair	Repair workshop	Repair workshop	Log Action	Out	Yes	Yes		
10	8	Move Asset	Move Asset	Move Asset	Log Action	Pending	Yes			
11	9	Perform Maintenance	Perform Maintenance	Perform Maintenance	Log Action	Out	Yes	Yes		
12	10	Field Transfer	Field Transfer	Field Transfer	Log Action	Pending	Yes			
13	10.5	SEEDCOUNT	Seed count	Seed count	Log Action	In	Yes			
14	11	Lock	Lock	Lock	Log Action	Pending	Yes			
15	12	Dispose	Dispose	Dispose	Log Action	Disposed	Yes			
16	13	Sell	Sell	Sell	Invoice	Out	Yes	Yes		
17	14	SITE	Taken to Site	Taken to Site	Log Action	Out	Yes	Yes		
18	15	Audit	Audit	Audit	Audit	Pending	Yes			
19	19	BookIn	Book In	Book In	Log Action	In	Yes			
20	20	BookOut	Book Out	Book Out	Log Action	Out	Yes	Yes		
21	22	Quote	Quote	Quote	Log Action	In	Yes			
22	23	Job	Job	Job	Log Action	In	Yes	Yes		

Click Add

Complete the fields as required:

Asset Action Maintenance

Basic

Email

Email Letter

Enable Emailing:

☒

Code:

Check In WOF

Description:

Check In WOF

Action:

Log Action

State:

In

Action Icons:

Repair

Sequence No.:

1

Show Return Date:

☒

Count:

☐

Allow Next Action:

☒

Next Action:

Check Out

Active:

☒

Email Letter:

☒

Letter Template:

Default Location:

imagetestcms

Action

SAMPLE-OUT

Action

SAMPLE-RETURN

Action

Service Due Letter

Reg Due

Service Vehicle finished

Action

Service Vehicle In

Action

WOF Due Letter 7days

WOF Due

Page 1 of 1

Save & New

Save & Close

Save

Close

See how to add more letter templates if you dont find a suitable template here

Enable Emailing	
Code	Use a unique code for each Letter
Description	The description will be used as the Subject Line for your email
Action	Choose an action that describes what you will be doing (You can set up your Actions you want to have as options)
State	Choose the state that best describes this action (In / Out / Pending / Disposed)
Action Icon	Choose an Icon of your choice
Sequence No.	This is the sequence in your Action List
Show Return date	This can be left blank, but this can trigger a reminder to a customer that an asset is due back
Count	
Allow Next Action	
Next Action	
Active	Ticking this box will allow this action to be active, it can be deactivated by unticking this box
Email Letter	Tick the box if you would like to trigger a email letter
Email Letter Template	Select the template for the email letter to be triggered
Default Location	Choose your location