










Add a Purchase to an Asset Record

1. Click the Assets Quick Link





















The screenshot displays the VIZOR dashboard for Donald Nathan's Homepage. The top left features the VIZOR logo, and the top right includes 'Modify' and 'Log Off' icons. A 'Quick Links' sidebar on the left lists several options: 'Assets' (highlighted with an orange box and arrow), 'Asset Check In / Check Out', 'Employees', 'Locations', 'My Approvals & Actions', 'Contract Agreements & Purchases', 'Roles & Policies', and 'Vendors and Suppliers'. To the right of the sidebar are two summary cards: 'Assets in storage total' showing '19 ASSETS IN STORAGE' and 'Requests for my approval' showing '0 APPROVALS'. A large blue VIZOR logo watermark is visible in the background.

- Find the asset you want to add a new purchase to by either using the queries in the top left corner of the page, searching for it in the top right corner of the page or scrolling to the asset.
- Double-click the desired asset to open it

Assets      

Assets    Search for an Asset...

(Start) > Computer > Desktop >

Name	Asset Tag	Serial Number	Status	Allocated to Person	Allocated to Device / Computer	Location	Unit/Divis	Departm	Project	Contain	Last Assigned Date		
ACCT-COMP-002	ACME-A18	S4NL125	Assigned	Martin We	--	USA \ New	Finance	General Ar	Project IS	--	1/16/2019		<input type="checkbox"/>
CUST-DEMO-001	--	S4NB115	Assigned	<None>	--	Belgium \	--	--	--	--	11/25/201		<input type="checkbox"/>
CUST-DEMO-003	--	S4NL117	Assigned	Rose Arrin	--	USA \ New	--	--	--	--	5/11/2018		<input type="checkbox"/>
DEV-COMP-00	ACME-28	S4NL111	Assigned	Sarah Sm	--	USA \ Ne	--	--	--	--	5/11/20:		<input checked="" type="checkbox"/>
DEV-COMP-003	--	S4KT113	Assigned	John Davis	--	USA \ New	--	--	--	--	5/11/2018		<input type="checkbox"/>
HR-COMP-002	--	R95W127	Assigned	Jane Rose	--	USA \ New	--	--	--	--	3/15/2018		<input type="checkbox"/>
QA-COMP-002	--	VMware-4	Assigned	Donald Na	--	USA \ New	--	--	--	--	5/11/2018		<input type="checkbox"/>
QA-COMP-004	--	S4NL129	Assigned	Chris Hubt	--	USA \ New	--	--	--	--	5/11/2018		<input type="checkbox"/>
SALES-COMP-00	--	S4NL119	Assigned	<None>	--	USA \ New	--	--	--	--	1/8/2019		<input type="checkbox"/>
SALES-COMP-00	--	S4NL121	Assigned	Daniel Ami	--	USA \ New	--	--	--	--	11/25/201		<input type="checkbox"/>
SUPPORT-COMP	--	QhZsi8rv6	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	92fuxjees	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	3qyTQzBS	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	sgjcnsugA	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	72F9nzdze	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	x7fbjxaby	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	9uDFFG5jb	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	dWcXWkE	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	n4G8xURS	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>
SUPPORT-COMP	--	eKe58BhV	Assigned	<None>	--	USA \ New	--	--	--	--	5/12/2018		<input type="checkbox"/>

Page 1 of 1 (34 matches)

Add Assets

Mass Update

Reassign/Relocate

Scrap

Mark Lost

Request Status

Manage Asset Types

Employee Assets

4. Click on the Purchases tab. This is where the basic information of the purchase for that asset is shown

Edit Asset: DEV-COMP-001
Update the information for the asset DEV-COMP-001.

History New Email Emails

Overview Details Computer Details **Purchases** Allocation Purchase Details Source Installations

Name: DEV-COMP-001 Status: Assigned
Manufacturer: LENOVO Model: 7638BV3
Serial Number: S4NL111
Asset Tag: ACME-2829-2323 Service Tag: LENOVO54NL111
Asset Expires?: No
Comments:
Track As:
ID: 357
Return Date:
Asset Type: Desktop
Reference ID:

Attachments

* This color indicates a required field

Back Next OK Apply Close

5. Click Add.

The screenshot shows a software window titled "Edit Asset: DEV-COMP-001" with the subtitle "Update the information for the asset DEV-COMP-001." The window has a top navigation bar with tabs: Overview, Details, Computer Details, Purchases (selected), Allocation, Purchase Details, Source, and Installations. In the top right corner, there are icons for History, New Email, and Emails. The main content area is titled "Purchases:" and contains a table with the following columns: Start Date, Type, Quantity, Cost, To, and Status. The table is currently empty. To the right of the table, there are three buttons: "Add...", "Edit...", and "Remove". The "Add..." button is highlighted with an orange border, and an orange arrow points to it from the left. At the bottom left of the window, there is a note: "* This color indicates a required field". At the bottom right, there are five buttons: Back, Next, OK, Apply, and Close.

6. A new window will pop up where you can choose what purchase type you want to create. For more information about which one to choose, see Related Purchase Types
7. Select how you want to add the Purchase and click OK

Edit Asset: DEV-COMP-001
Update the information for the asset: DEV-COMP-001.

History New Email Emails

Overview Details Computer Details Purchases Allocation Purchase Details Source Installations

Purchases:

Start Date	Type	Quantity	Cost	To	Status
------------	------	----------	------	----	--------

Add...
Edit...
Remove

Related Purchases
Choose the type of related purchase to add to the purchase

- Enter a Full Purchase**
Choose this option if you have an invoice or purchase order to enter, then add the line items to this purchase.
- Enter a Simple Purchase**
Enter the minimum information about the purchase, then add the line items to this purchase.
- Select From an Existing Purchase in VIZOR**
If your purchase is already entered in Vizor, choose this option to select the line items to add to this purchase.

OK Cancel

* This color indicates a required field

Back Next OK Apply Close

8. A new window will open where you can add the basic information for the new purchase. Click on Add in the line item section

Add New Purchase

Enter the information for the new Purchase.

Name:

PO Number:

Purchase Date:

Auto Renew Purchase: No Yes

Status: Active / Received

See More Details: No Yes

Supplier:

Line Items:

Line #	Asset Type	Product	Quantity	Unit	Total	Description	Start
--------	------------	---------	----------	------	-------	-------------	-------

Total: \$ 0.00

Comments:

Taxes: \$ 0.00

* This color indicates a required field

[Add...](#)
[Edit...](#)
[Edit Alerts...](#)
[Remove](#)

[Finish](#) [Close](#)

9. Another window will pop up where you can add the information necessary to create a new line item for this purchase. Fill in the new Line item information

Add New Line Item
Enter the information for the new Line Item.

Line Item Number: 1

Sub Type: [Dropdown] **Status:** Active / Received [Dropdown]

Asset Type: [Dropdown] **Product Code:** [Text]

Quantity: [Text] **Unit Price:** \$ 0.00

Description: [Text Area]

Duration: Permanent [Dropdown]

Start Date: 8/6/2019 [Calendar]

Department: [Dropdown] **Location:** [Dropdown]

Project: [Dropdown] **License Server:** [Dropdown]

GL Account: [Dropdown] **Reference ID:** [Text]

* This color indicates a required field

* This color indicates a required menu

Finish **Close**

10. Click Finish. This will close the window and add the new line item into VIZOR

Add New Line Item
Enter the information for the new Line Item.

Line Item Number:	1	Status:	Active / Received
Sub Type:	Asset	Product Code:	
Asset Type:	UPS - Uninterruptible Power Supply	Unit Price:	\$ 225.00
Quantity:	30	Auto Create Assets:	No <input checked="" type="checkbox"/> Yes
Description:			
Duration:	Permanent	Department:	Infrastructure
Start Date:	8/6/2019	Location:	Belgium \ Brussels \ North Campus \ Floor
Project:	Project BG73	License Server:	
GL Account:		Reference ID:	

* This color indicates a required field
* This color indicates a required menu

Finish **Close**

11. Click on OK on the alert window that pops up. This alert is there to remind you that the instance of the line item is being created in the background. In VIZOR an instance of a line item means that the line item is selectable and usable.

12. Click Finish to save the new Purchase and close the current open window

Add New Purchase
Enter the information for the new Purchase.

Name: Status:

PO Number:

Purchase Date:

Auto Renew Purchase: No Yes

See More Details: No Yes

Supplier:

Line Items:

Line #	Asset Type	Product	Quantity	Unit	Total	Description	Start
1	UPS - Uninterruptible Pow		30	\$ 225.00	\$ 6,750.00		

Total:

Comments:


Taxes:

Total with Tax:

* This color indicates a required field

Finish **Close**

13. A window will pop up where you can select what line item to link to the purchase previously created. Select the newly created line item from the list

PO Number Contains... 


Invoice

Purchase Date: -- Sold to Person: --
Invoice Number: --
PO Number: -- Supplier: --

ID	Line #	Quantity	Description	Unit Price	Total	Type
10004	1	30		225	6750	

Total: \$ 6,750.00

14. Click OK to save the changes and close the window

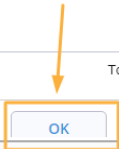
PO Number Contains... 

Purchase Date: -- Sold to Person: --
Invoice Number: --
PO Number: -- Supplier: --

Invoice

ID	Line #	Quantity	Description	Unit Price	Total	Type
10004	1	30		225	6750	

Total: \$ 6,750.00



15. Click OK to save the changes to the asset. It will also close the current window

The screenshot shows a software window titled "Edit Asset: DEV-COMP-001" with a subtitle "Update the information for the asset DEV-COMP-001." The window has a navigation bar with tabs: Overview, Details, Computer Details, Purchases (selected), Allocation, Purchase Details, Source, and Installations. The main content area is titled "Purchases:" and contains a table with the following data:

Start Date	Type	Quantity	Cost	To	Status
	Line Item	30	\$ 6,750.00		Active / Received

On the right side of the table, there are three buttons: "Add...", "Edit...", and "Remove". At the bottom of the window, there is a footer with the text "* This color indicates a required field" and a row of buttons: "Back", "Next", "OK", "Apply", and "Close". The "OK" button is highlighted with an orange box, and an orange arrow points to it from the right.