

Add a maintenance service for an asset

In this document we will add the actual service as well as its cost

1. Click the Assets Quick Link to open it

The screenshot displays the VIZOR dashboard for Donald Nathan's Homepage. The dashboard includes a 'Quick Links' sidebar on the left and two summary cards on the right. The 'Assets' link in the sidebar is highlighted with an orange box and an orange arrow pointing to it. The 'Assets in storage total' card shows 19 ASSETS IN STORAGE, and the 'Requests for my approval' card shows 0 APPROVALS.

VIZOR Donald Nathan's Homepage Modify Log Off


Quick Links

- Assets**
View all asset instances in the library
- Asset Check In / Check Out**
Check out and assign assets to people. Check them in when returned. Use barcode readers for faster processing.
- Employees**
View and manage employee, contractor & student profiles and assets
- Locations**
View and manage locations
- My Approvals & Actions**
Manage my Vizor Approvals & Actions
- Contract Agreements & Purchases**
View and manage all agreements, maintenance contracts, purchases and invoices
- Roles & Policies**
View and manage departments, teams, jobs and projects and role-based asset provisioning policies
- Vendors and Suppliers**

Assets in storage total
19
ASSETS IN STORAGE

Requests for my approval
0
APPROVALS

- Find the asset you want to add a maintenance service 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  Reports Password Options Homepage Log Off

Assets

(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 Am	--	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 to show the basic information about the asset's purchases

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 top navigation bar with tabs: Overview, Details, Computer Details, Purchases (highlighted with an orange box and an arrow), Allocation, Purchase Details, Source, and Installations. The main area contains a form with the following fields:

Name:	DEV-COMP-001	Status:	Assigned
Manufacturer:	LENOVO	Model:	7638BV3
Serial Number:	S4NL111	Service Tag:	LENOVOS4NL111
Asset Tag:	ACME-2829-2323		
Asset Expires?:	No		
Comments:	<div style="border: 1px solid #ccc; height: 40px;"></div>		
Track As:	<input type="text"/>		
ID:	357		
Return Date:	<input type="text"/>	Attachments	
Asset Type:	Desktop	Reference ID:	<input type="text"/>

At the bottom left, there is a note: "* This color indicates a required field". At the bottom right, there are five buttons: Back, Next, OK, Apply, and Close.

5. Click on Add in the right corner of the 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. 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, there is a note: "* This color indicates a required field". At the bottom right, there are five buttons: Back, Next, OK, Apply, and Close.

- To see more details about each type of purchase, see the Related Purchases types KB
- A new window will appear. Select what type of purchase you want to add. To simplify the process, *Enter a Simple Purchase* has been selected for the example below

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
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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

- Click OK to select the purchase type. This will open another window where you can add the new Purchase

The screenshot shows a software interface for editing an asset. The main window is titled "Edit Asset: DEV-COMP-001" and has a subtitle "Update the information for the asset DEV-COMP-001." The interface includes a navigation bar with tabs: Overview, Details, Computer Details, Purchases (selected), Allocation, Purchase Details, Source, and Installations. Below the tabs is a table for "Purchases" with columns: Start Date, Type, Quantity, Cost, To, and Status. To the right of the table are buttons for "Add...", "Edit...", and "Remove". A modal dialog box titled "Related Purchases" is open in the center. It contains a red folder icon and the text "Choose the type of related purchase to add to the purchase". There are three radio button options: "Enter a Full Purchase" (unselected), "Enter a Simple Purchase" (selected), and "Select From an Existing Purchase in VIZOR" (unselected). At the bottom of the dialog are "OK" and "Cancel" buttons, with an orange arrow pointing to the "OK" button. At the bottom of the main 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.

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

9. Fill in the information for the Maintenance service.

Add New Purchase

Enter the information for the new Purchase.

Name: Status:

PO Number: See More Details: No Yes

Purchase Date: Supplier:

Auto Renew Purchase: No Yes

Line Items:

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

Comments:

Taxes:

* This color indicates a required field

Finish Close

10. Click on Add on the right side of the window.

Add New Purchase

Enter the information for the new Purchase.

Name: Status:

PO Number: See More Details: No Yes

Purchase Date: Supplier:

Auto Renew Purchase: No Yes

Line Items:

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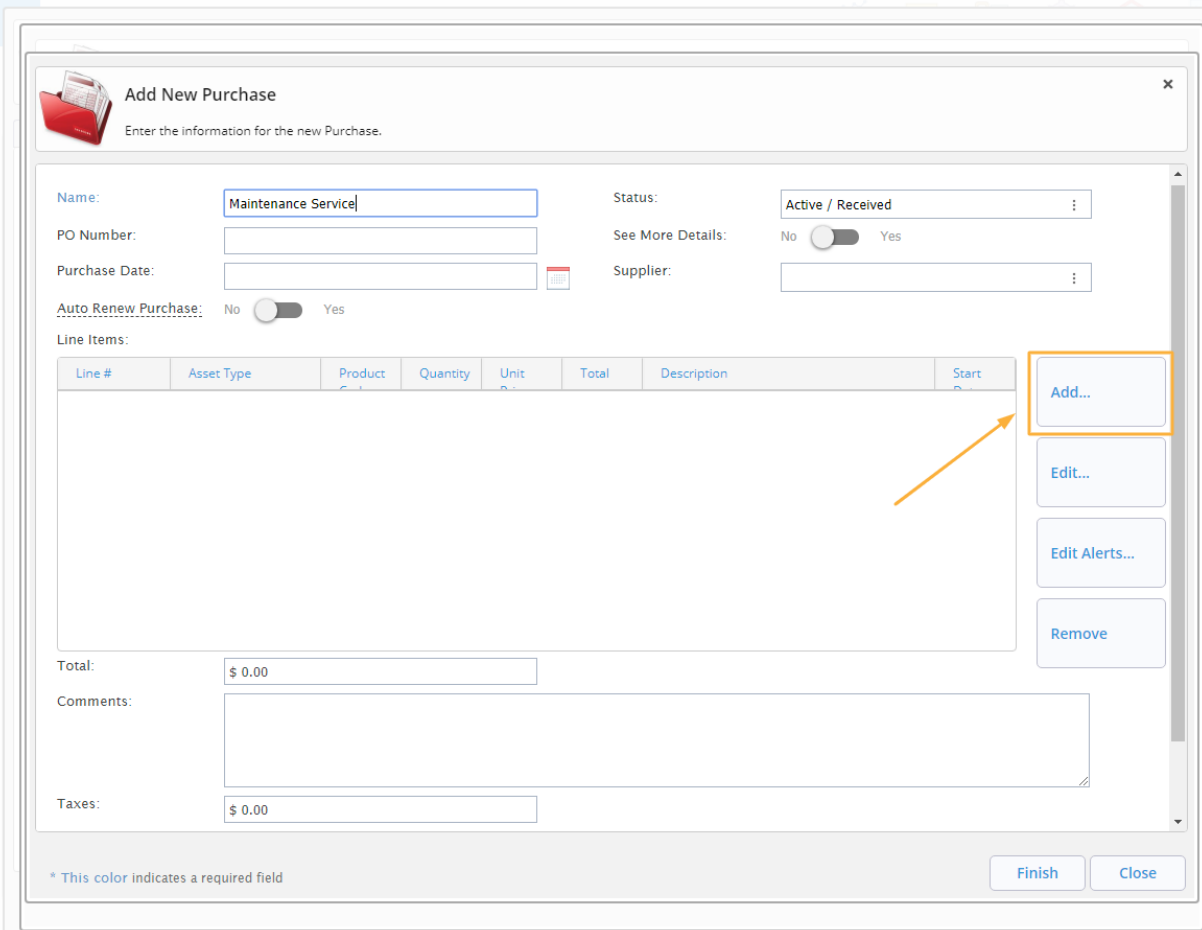
Total:

Comments:

Taxes:

* This color indicates a required field

Finish Close



11. Click OK on the alert that pops up warning you that it will have to save the current purchase in order to proceed.
12. Fill in the **service information related to** for the Maintenance service. It is important to add the *Duration* of the Service's Line item so that it can be easily tracked later. Make sure to add the cost of the Service in the *unit price* to be able to track the fees and prices.

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

Line Item Number:	1	Status:	Active / Received
Sub Type:	Maintenance	Product Code:	
Asset Type:	Desktop	Unit Price:	\$ 500.00
Quantity:	30000	Description:	
Duration:	Temporary	Start Date:	8/6/2019
Start Date:	8/6/2019	End Date:	8/6/2025
Department:		Location:	
Project:		License Server:	
GL Account:		Reference ID:	

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

Finish Close

NOTE: Make sure that the *sub type* is set to Maintenance

13. Click on Finish to save the newly created line item to the purchase and to close this window

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

Line Item Number: 1

Sub Type: Maintenance **Status:** Active / Received

Asset Type: Desktop **Product Code:**

Quantity: 30000 **Unit Price:** \$ 500.00

Description:

Duration: Temporary

Start Date: 8/6/2019 **End Date:** 8/6/2025

Department: **Location:**

Project: **License Server:**

GL Account: **Reference ID:**

Finish **Close**

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

- Click OK on the alert that pops up reminding you that the assets will be auto created in the background in VIZOR to be used later
- Click Finish to save the changes to the purchase and to close the window

Add New Purchase
Enter the information for the new Purchase.

Name: Maintenance Service Status: Active / Received

PO Number: See More Details: No Yes

Purchase Date: Supplier:

Auto Renew Purchase: No Yes

Line #	Asset Type	Product	Quantity	Unit	Total	Description	Start
1	Desktop		30000	\$ 500.00	\$ 15,000,000		

Total: \$ 15,000,000.00

Comments:

Taxes: \$ 0.00

Total with Tax: \$ 15,000,000.00

* This color indicates a required field

Finish Close

- 16. A new window will pop up where you need to select the newly created line item and link it to the current purchase
- 17. Select the newly added line item on the right side

PO Number Contains...


Invoice

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

ID	Line #	Quantity	Description	Unit Price	Total	Type
10001	1	30000		500	15000000	

Total: \$ 15,000,000.00

18. Click OK which will link the line item to the purchase and close the window

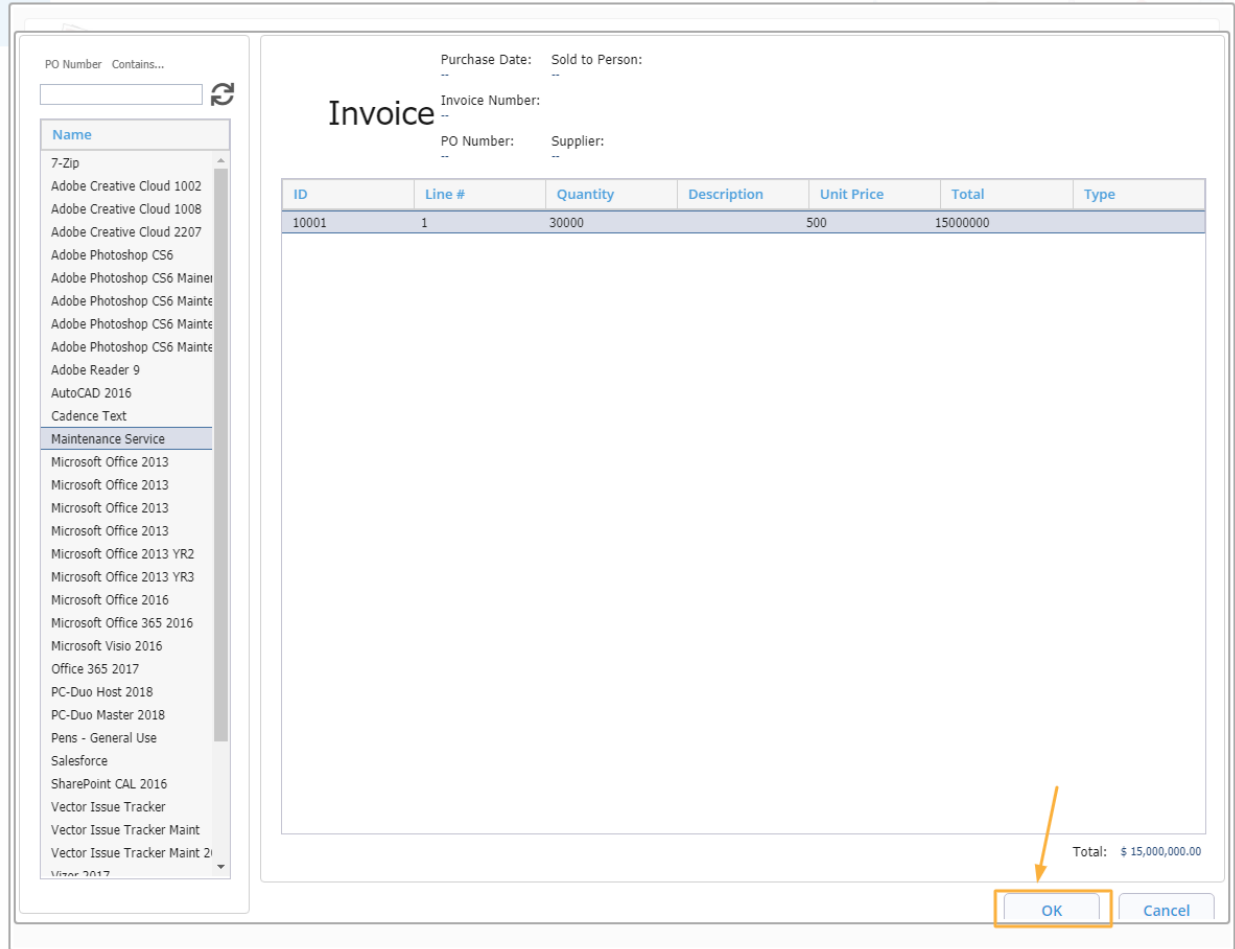
PO Number Contains... 

Invoice

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

ID	Line #	Quantity	Description	Unit Price	Total	Type
10001	1	30000		500	15000000	

Total: \$ 15,000,000.00



19. Click OK to close the window of the asset

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	30000	\$ 15,000,000.00	8/6/2025	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" (highlighted with an orange box), "Apply", and "Close".