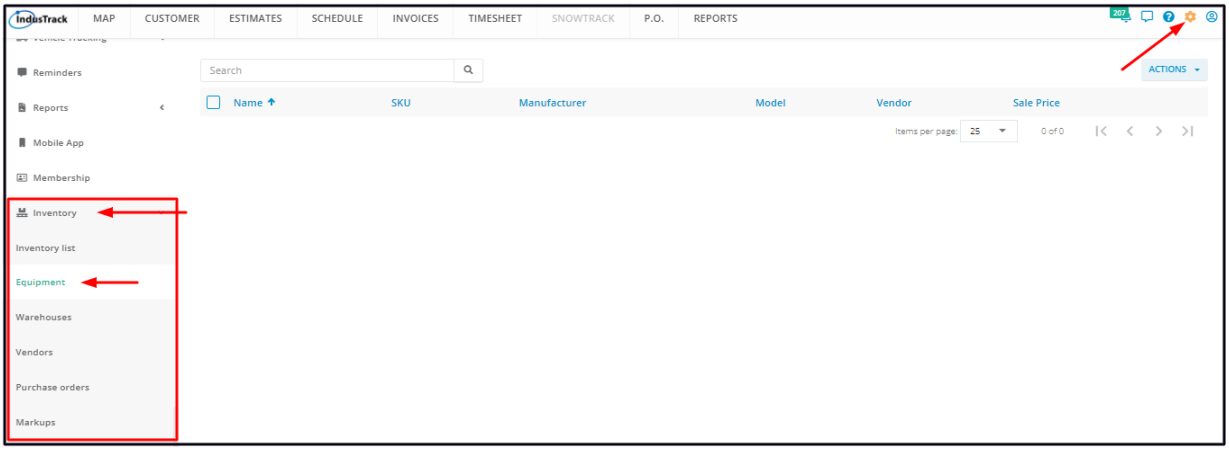
Equipment

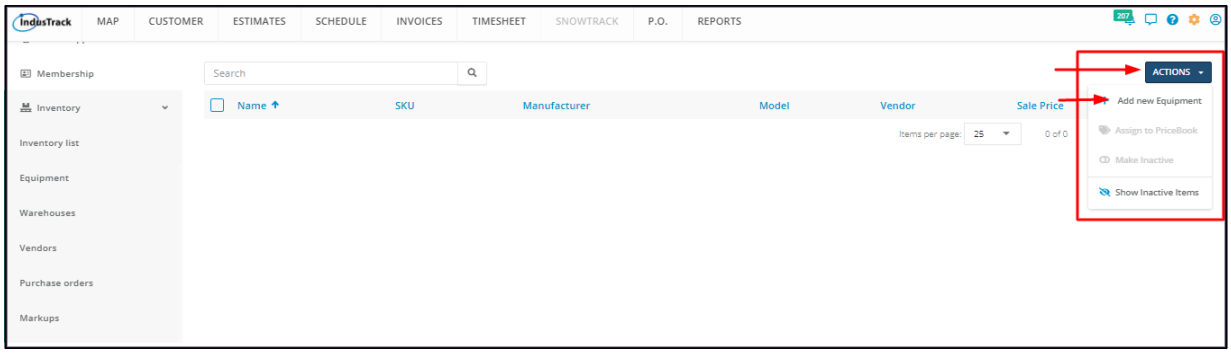
Equipment is a long term-asset that benefits companies or businesses over several years. If you supply or sell equipment, IndusTrack helps you keep track of these items the same way that it does your inventory.

To add and manage your equipment inventory records, go to **Settings > Inventory > Equipment**.

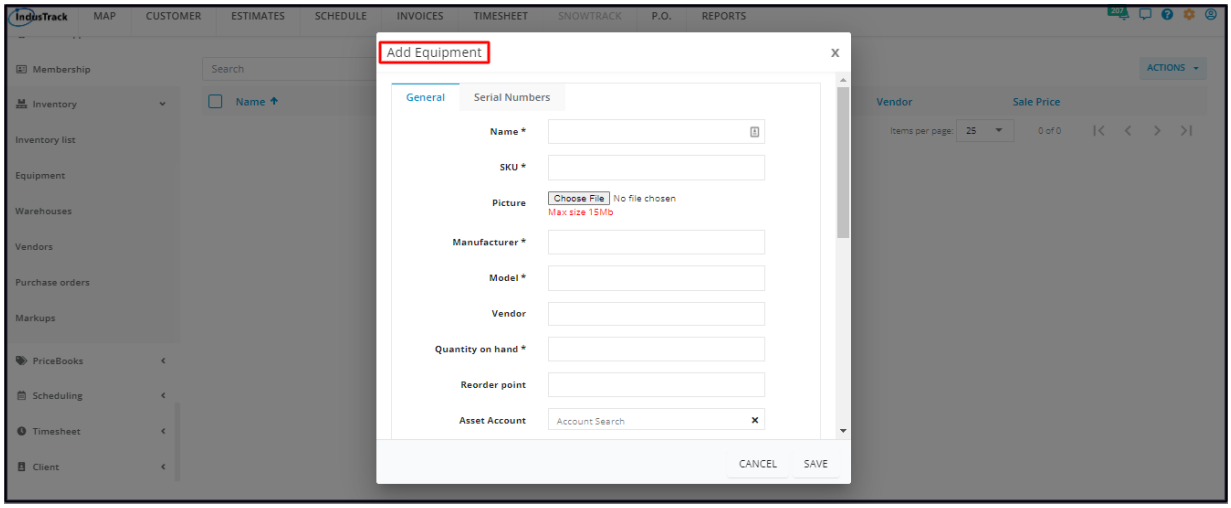


Set Up a New Equipment Record

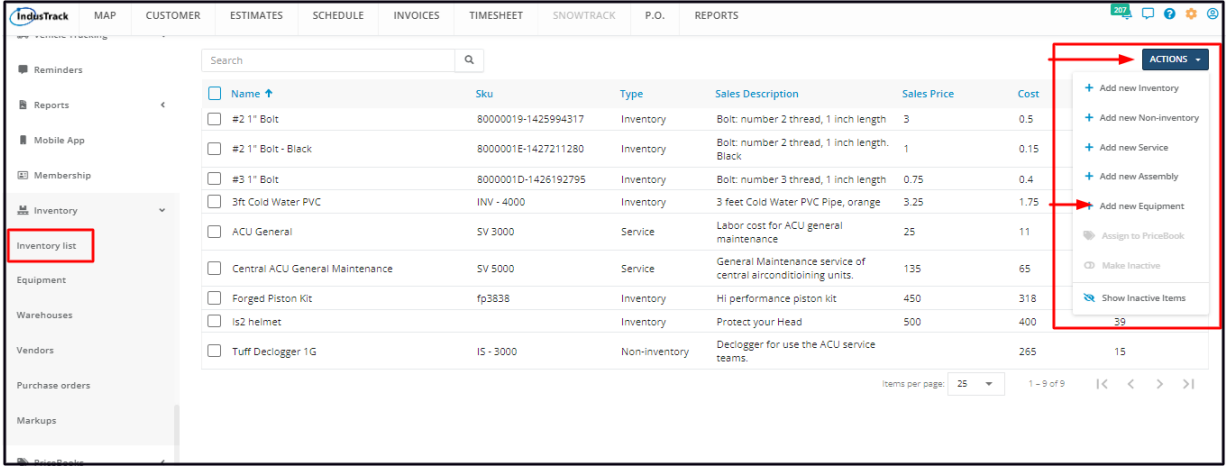
From the Equipment page, click on the **Actions** button and select **+ Add new Equipment.**



Fill in the item details on the **Add Equipment** window. Fields with (*) are required.



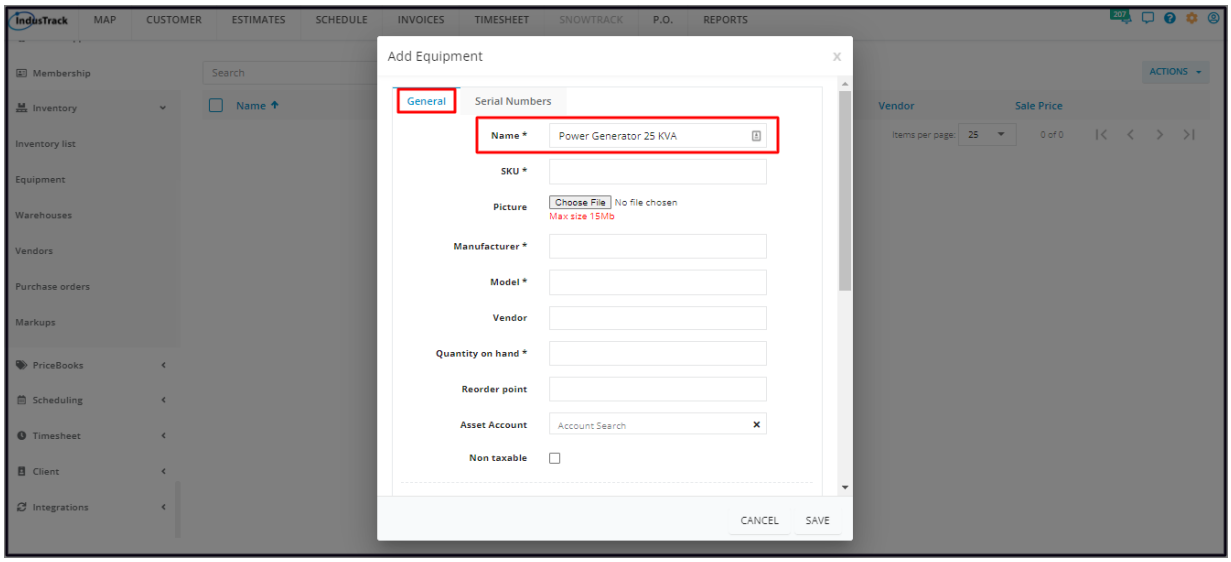
*Alternatively, equipment record set-up can also be accessed from the Inventory List page. Go to **Settings > Inventory > Inventory List.** From the Actions button, select **Add New Equipment**. The same Add Equipment window will come up. When the new equipment record is saved, this is added to the Equipment List.*



General Information

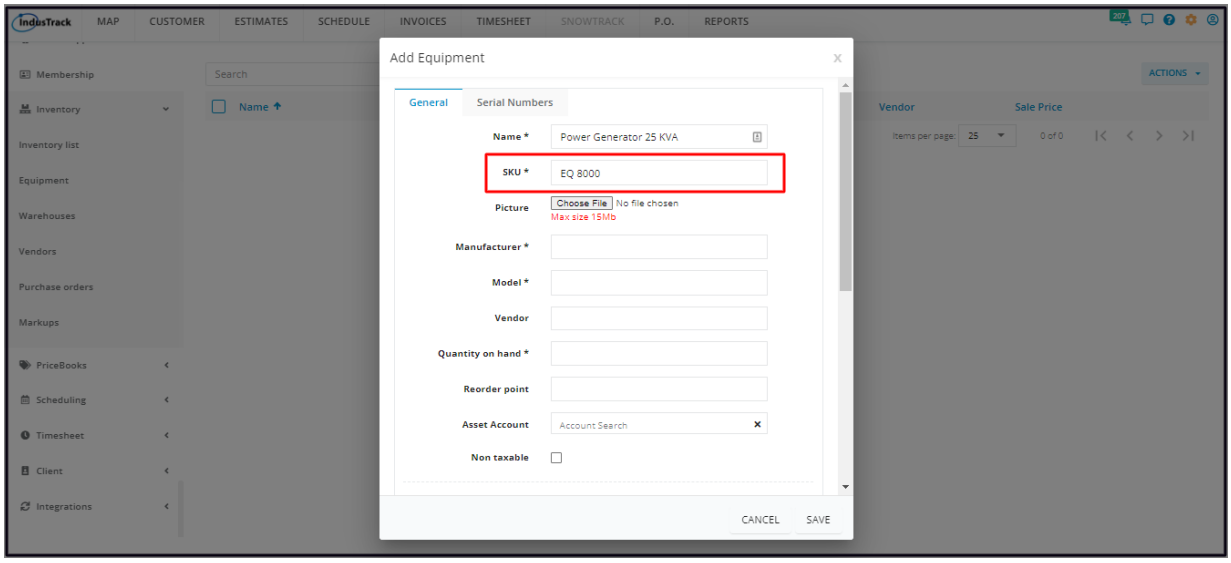
Name*

- Key in the name of the equipment.



SKU*

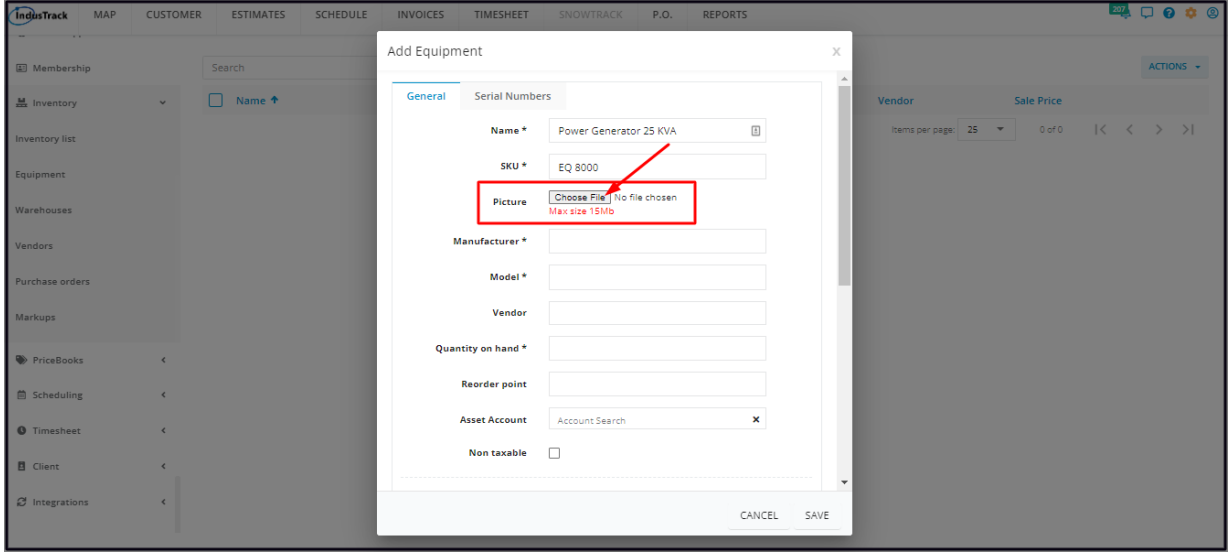
- Key in the item's assigned equipment code.



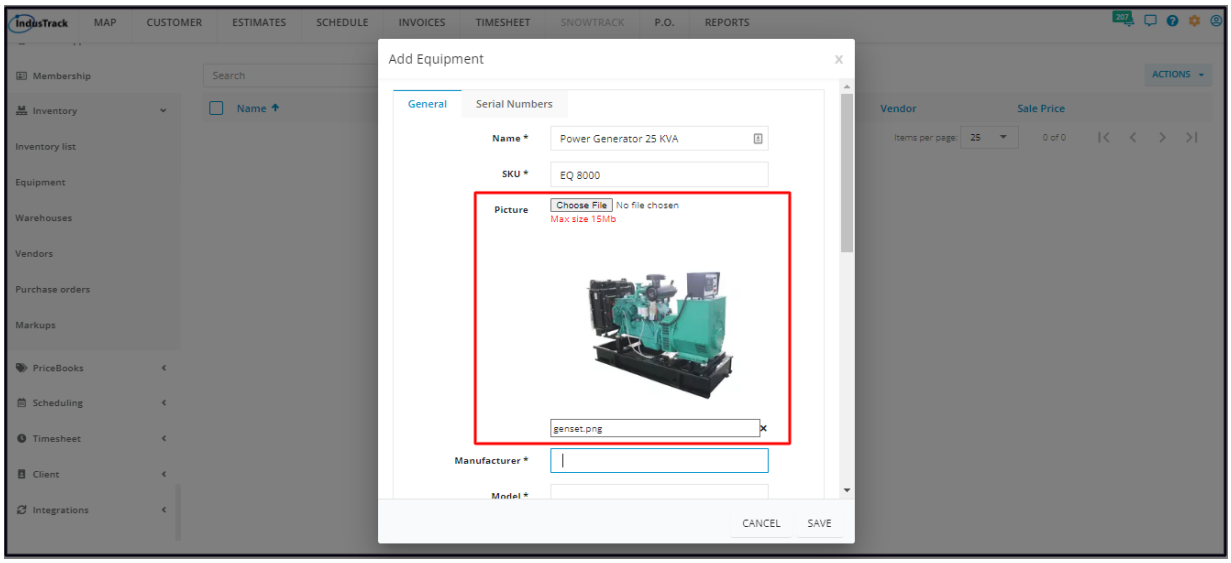
Picture

Optionally upload an image of the equipment. The maximum file size that can be uploaded is 15Mb.

- Click **Choose File**.

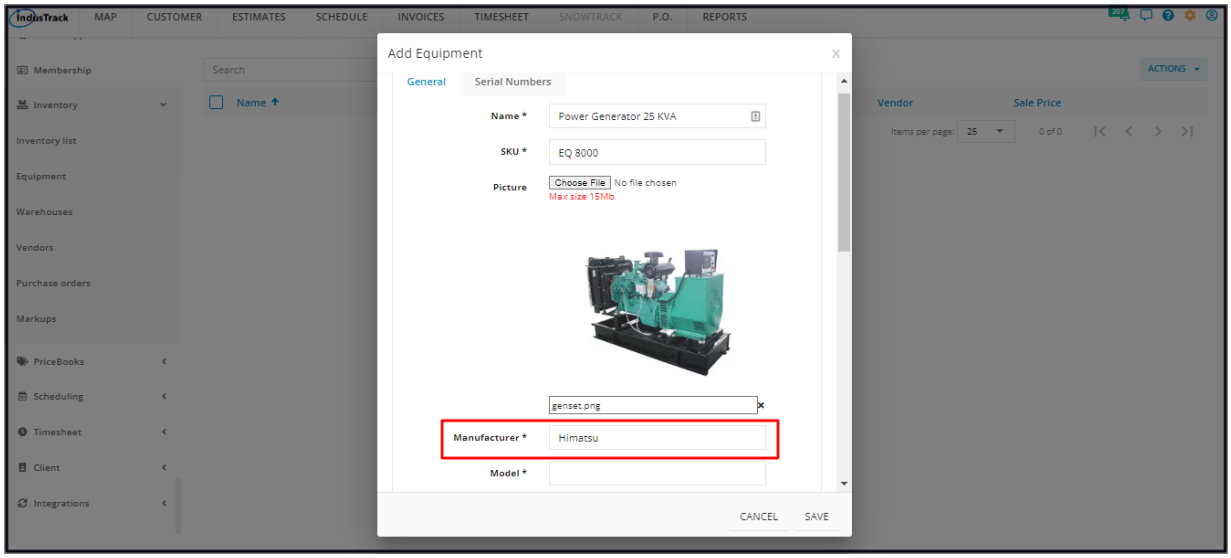


- Select and upload the image from your device.



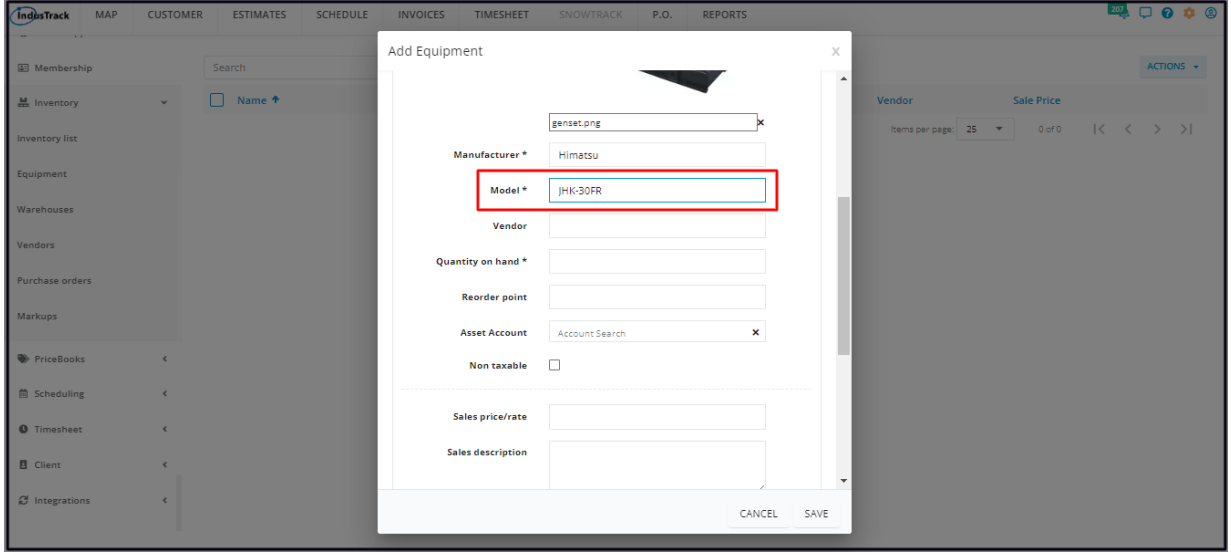
Manufacturer*

- Key in the maker or producer of the equipment



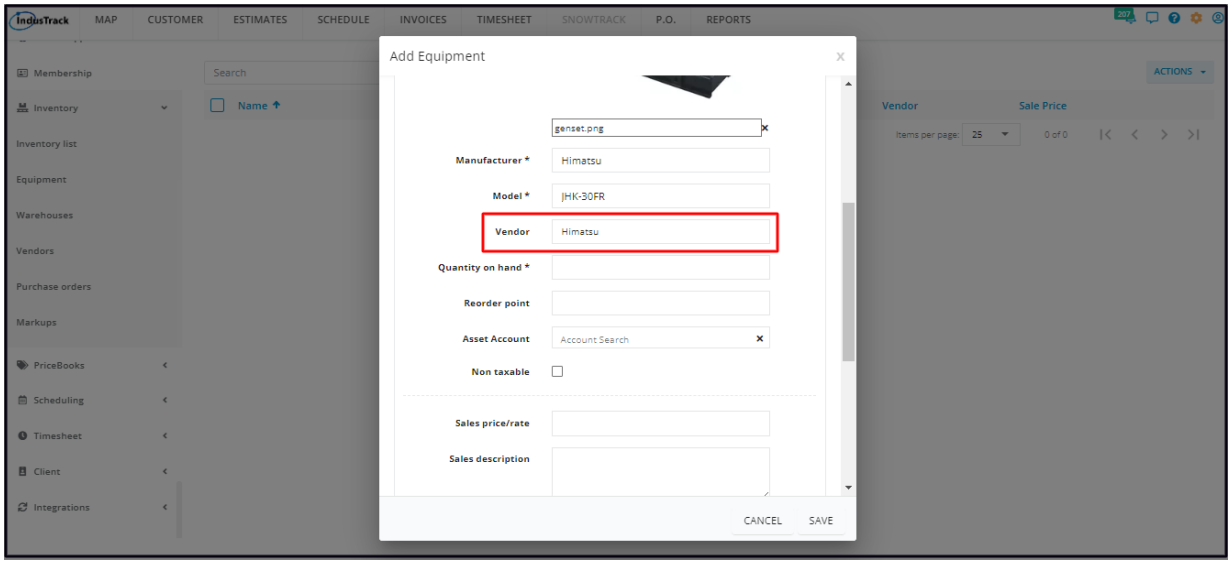
Model*

- Enter the equipment's Model Number/Code.



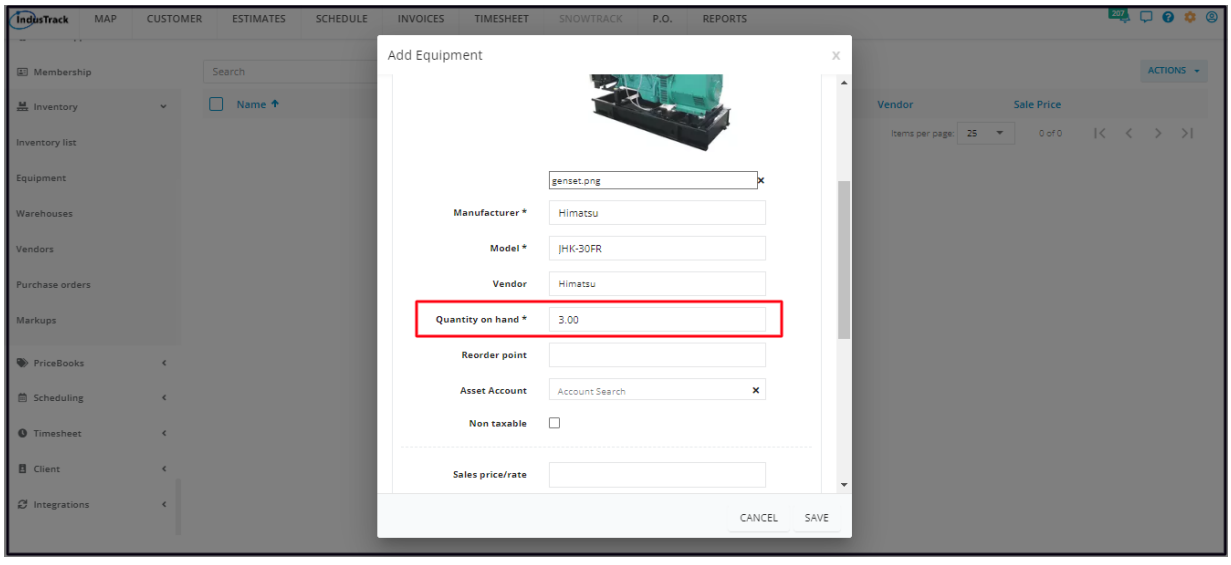
Vendor

- Select the supplier/distributor from the drop-down list.
- If the supplier is not on the list, key in the name. This will be added to the vendor list when the item is saved.

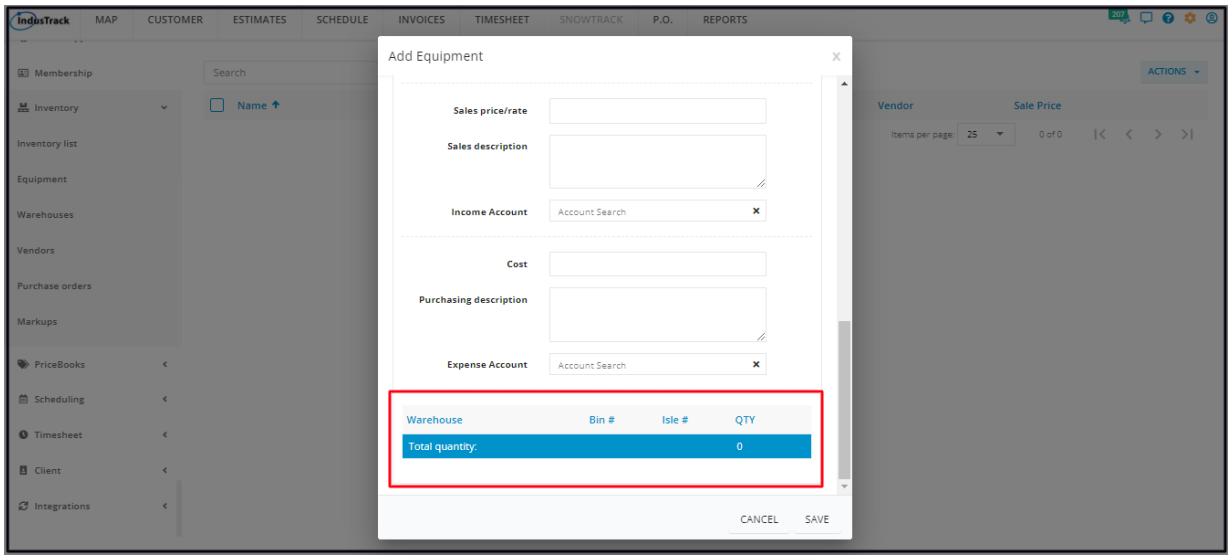


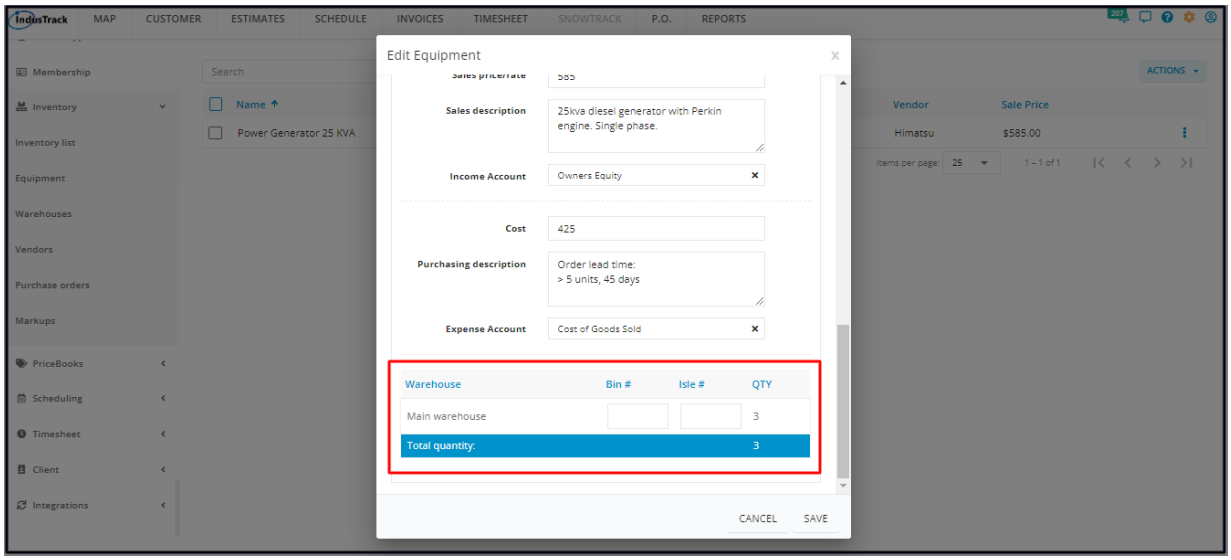
Quantity on Hand*

- Key in the stocks on hand. This will now be your beginning inventory at the **Main Warehouse**.
  - Equipment Inventory can also be monitored using serial numbers. See the section *Serial Numbers* below to learn how this works.
- This is a required field so if there is no quantity on hand, use 0.



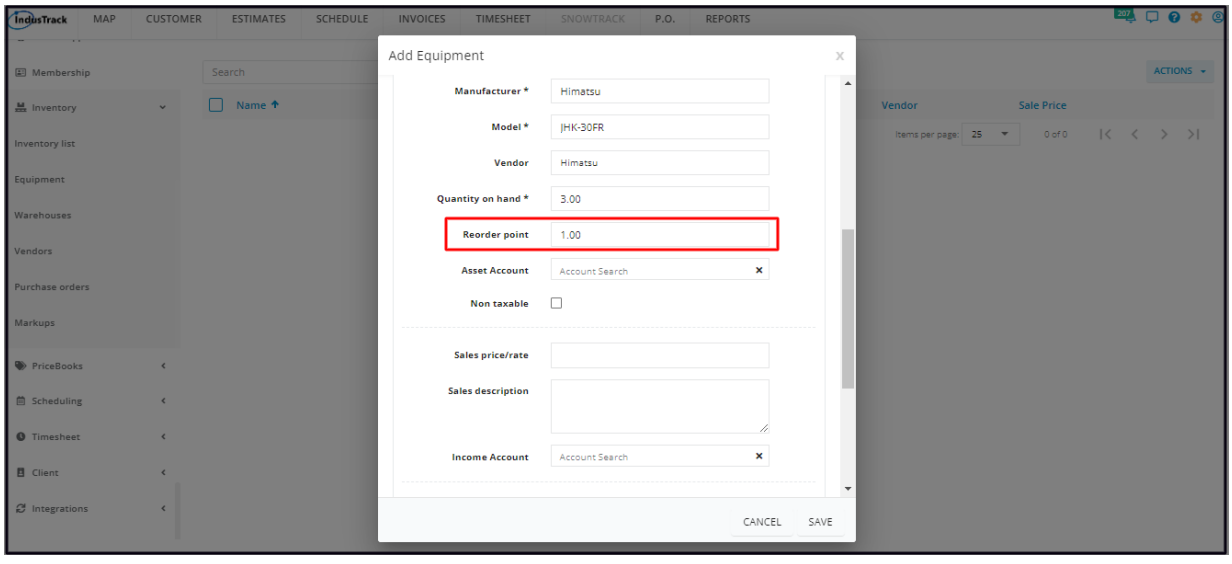
*Once the equipment record is saved and the stock location information is already available, or if applicable, open the item details in edit mode and enter the **Bin #** and/or **Isle #**. Until then, the placeholder for warehouse inventory remains disabled. However, if the inventory using Serial Numbers option is used, this warehouse inventory will remain disabled and will no longer be used.*





Reorder Point

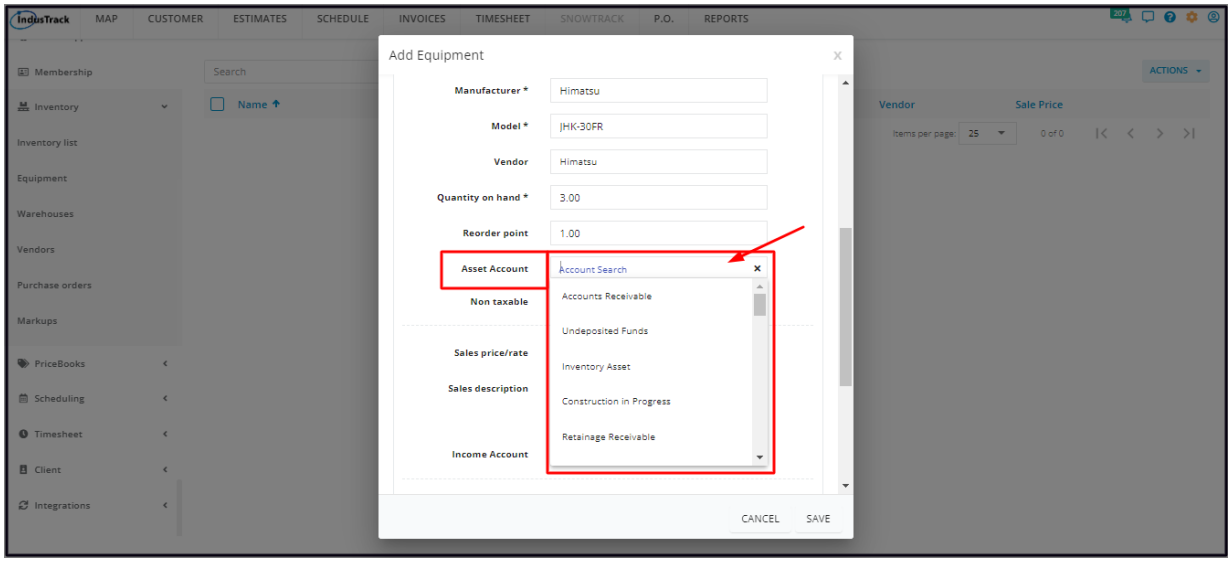
- Set the minimum quantity for reordering the equipment.



Asset Account

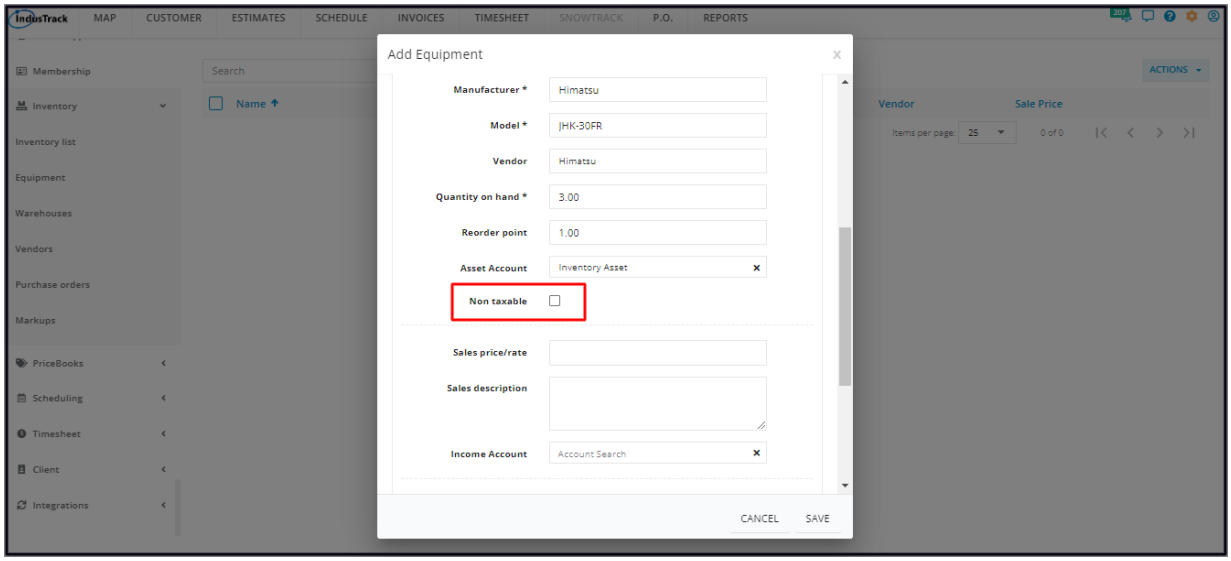
- Select the corresponding asset account from the dropdown list.
  - Scroll down the list to find the correct account name. OR
  - Key in the account name on the search field to quickly find the correct one.

- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.



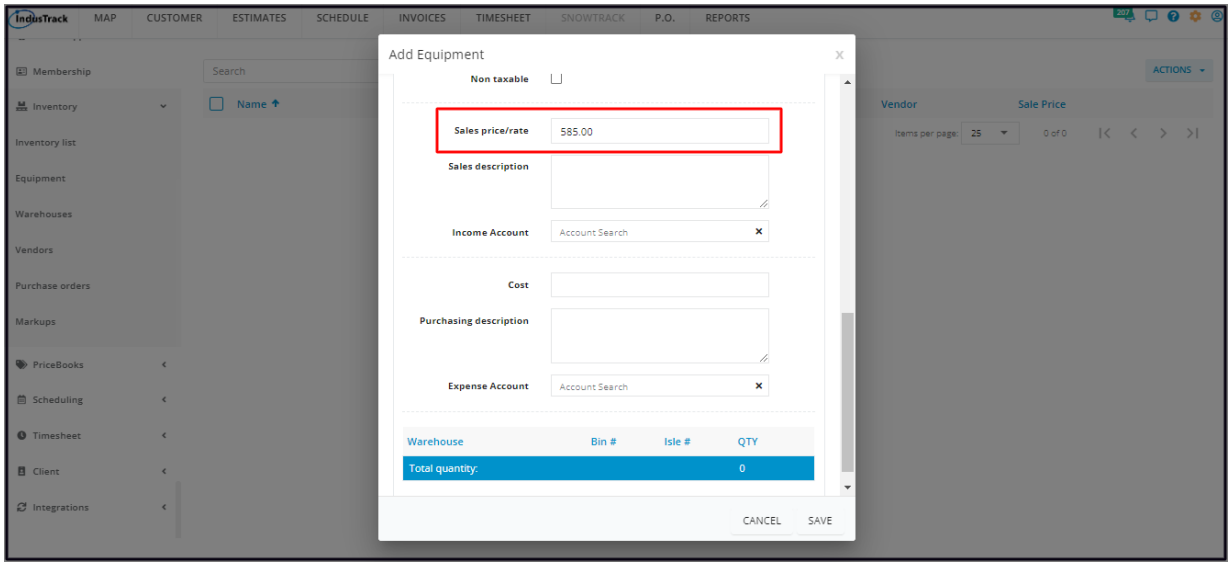
Non taxable

- If the equipment is not taxable, tick the checkbox. But if it is, leave the checkbox empty.



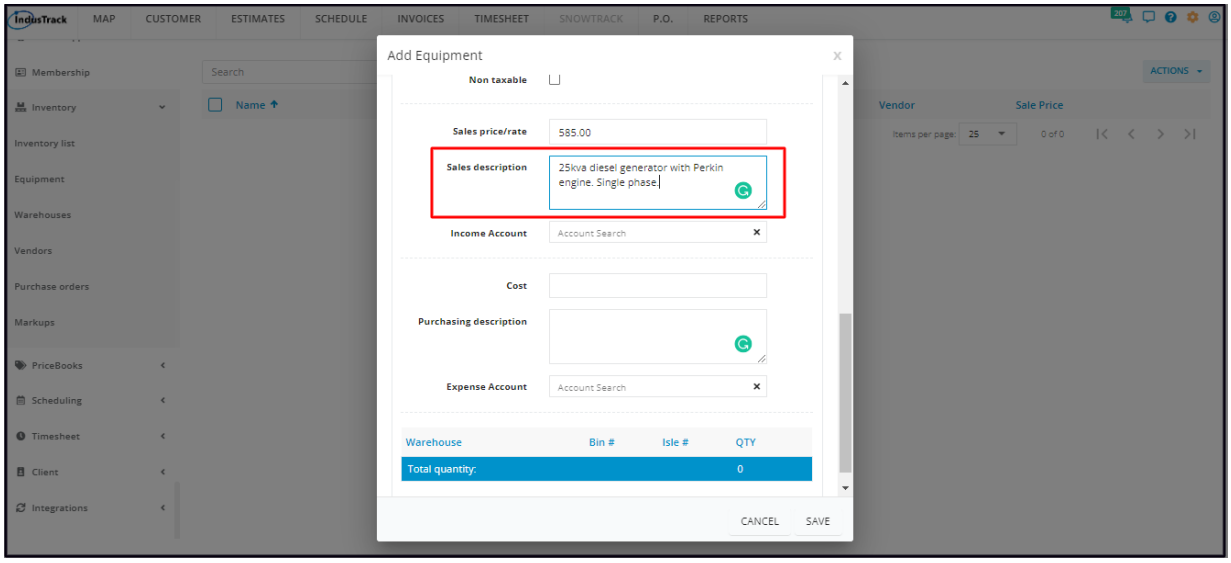
Sales price/rate

- Key in the selling price of a single unit of equipment. This is the price quoted to customers.



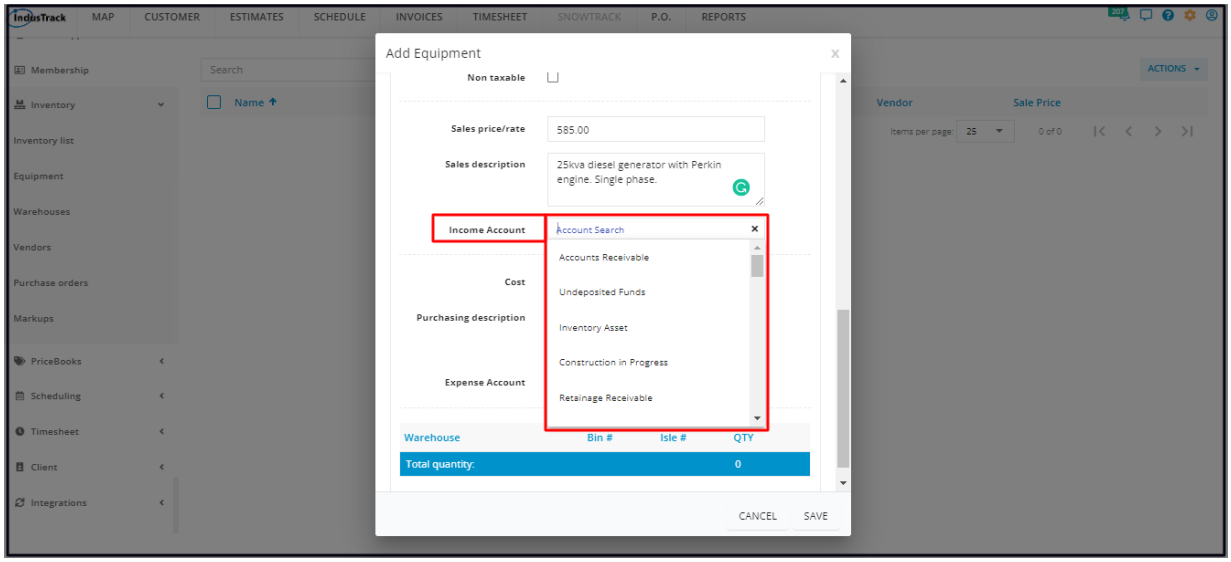
Sales Description

- Key in a short description of the equipment.



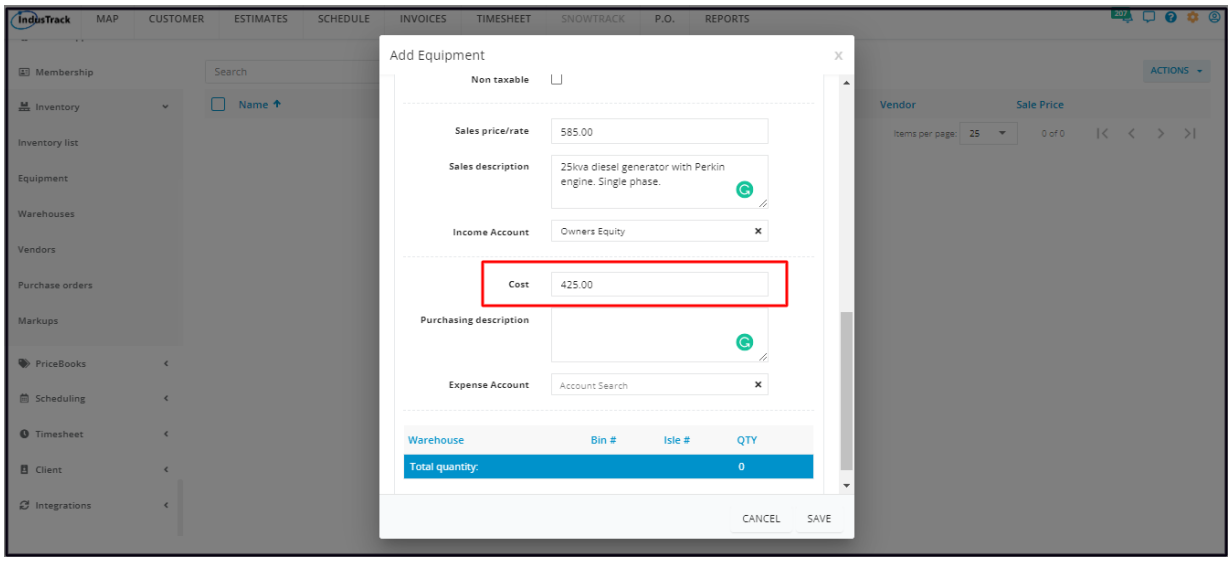
Income Account

- Select the corresponding income statement account from the dropdown list.
  - Scroll down the list to find the correct account name. OR
  - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.



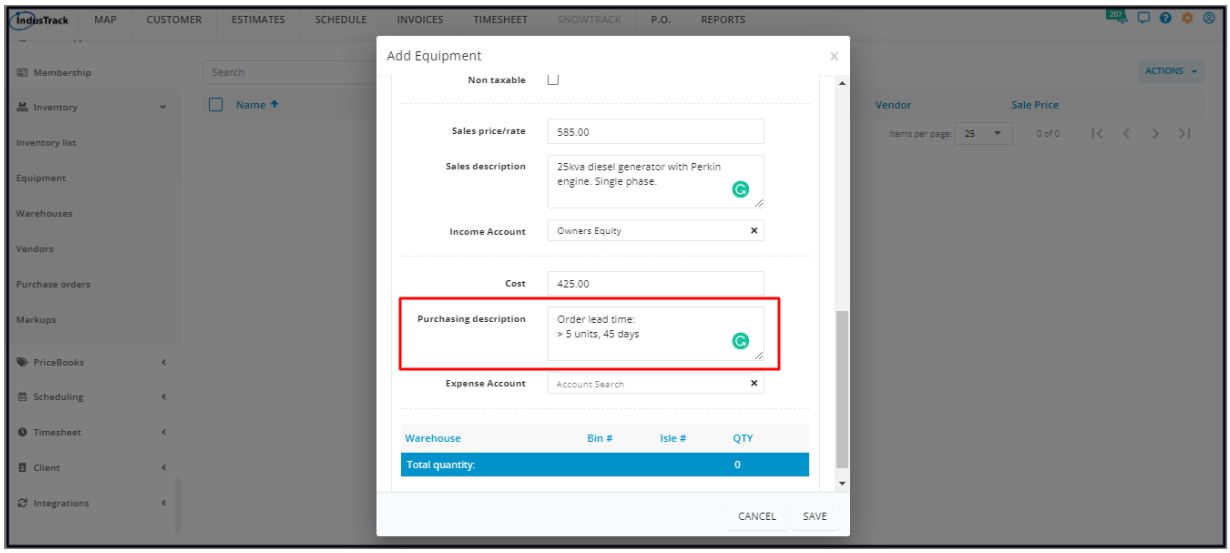
Cost

- Key in the acquisition cost of a single unit of equipment.



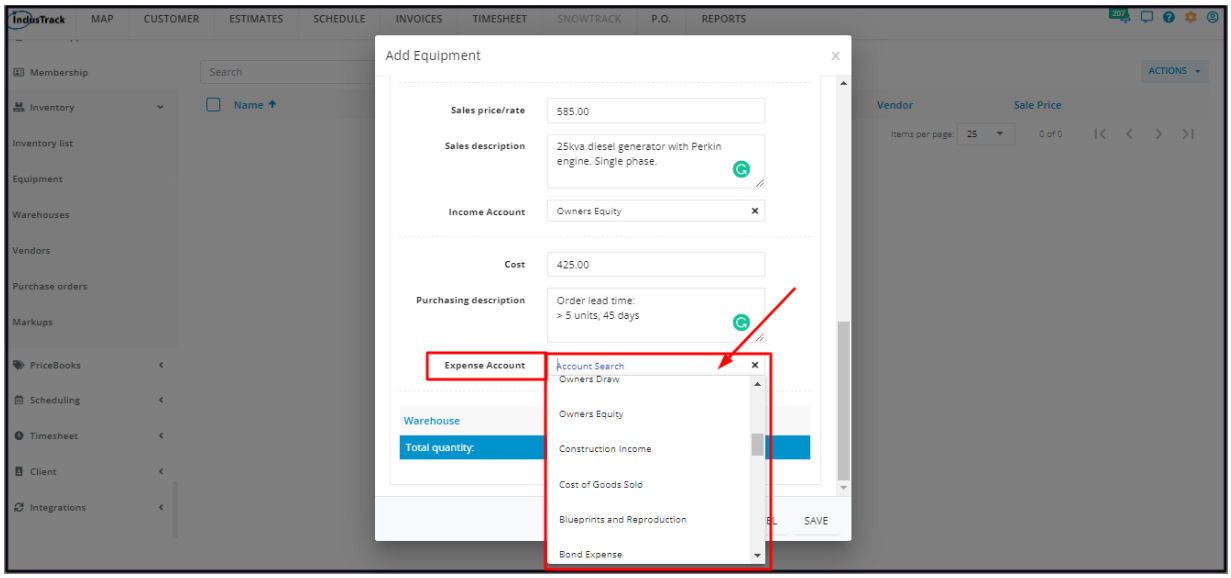
Purchasing Description

- Key in any special purchasing notes, if any, such as required order lead time.



Expense Account

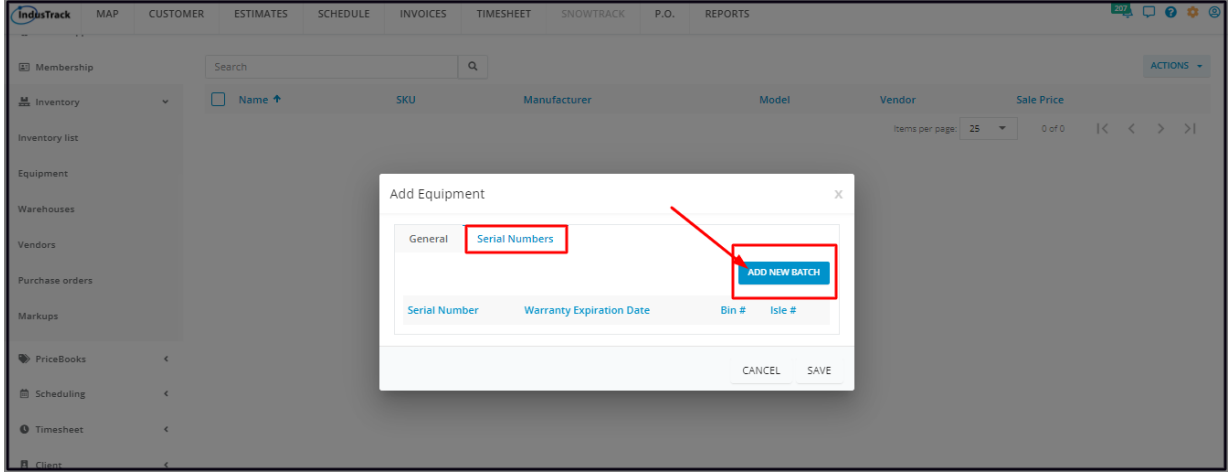
- Select the corresponding expense account from the dropdown list.
  - Scroll down the list to find the correct account name. OR
  - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.



Serial Numbers

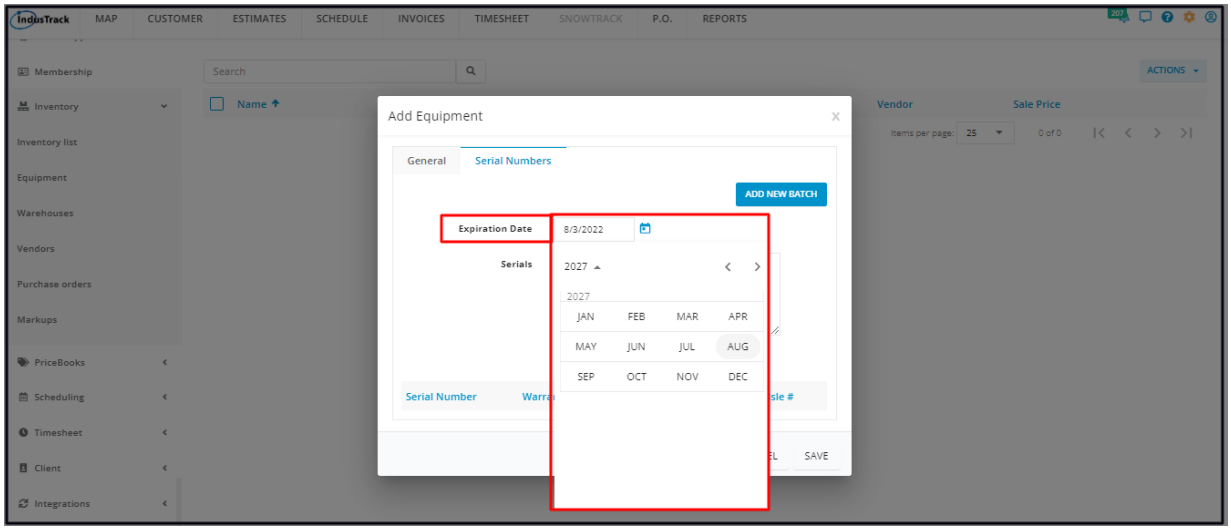
Recording the individual equipment serial numbers into the system is not mandatory. However, it is a good business practice to do so. Using this option will override the Quantity on Hand recorded on the General tab if any.

On the **Serial Numbers** tab, click the **Add New Batch** button.



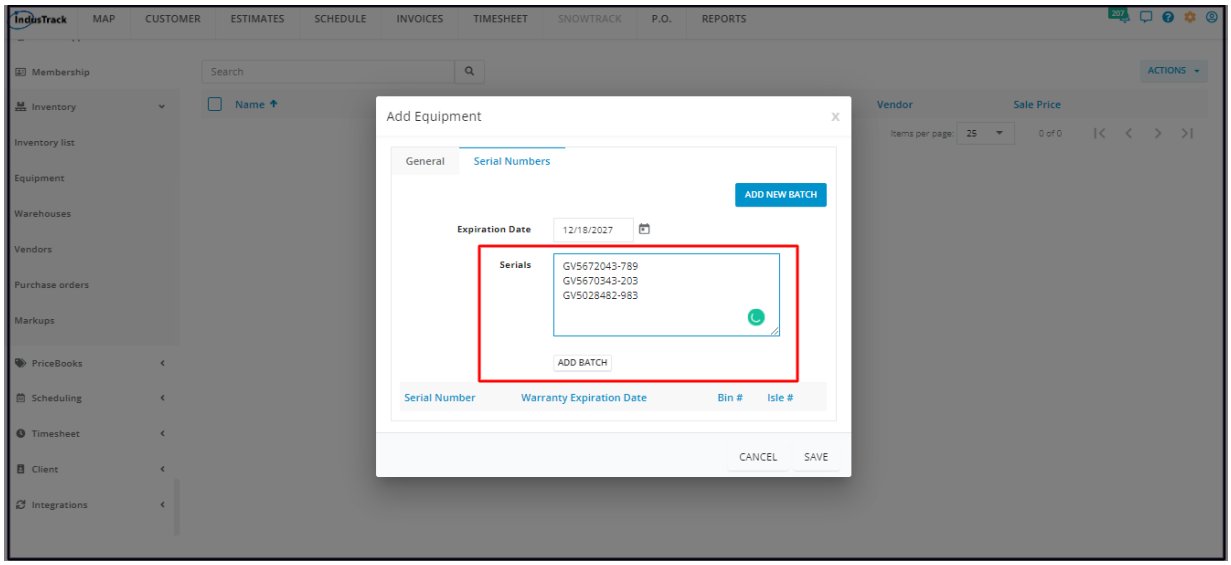
Expiration Date

- Set the expiration date of the equipment, if applicable. Use the date picker or key in the date on the field.
    - If the equipment serial numbers have different expiration dates, enter these individually.

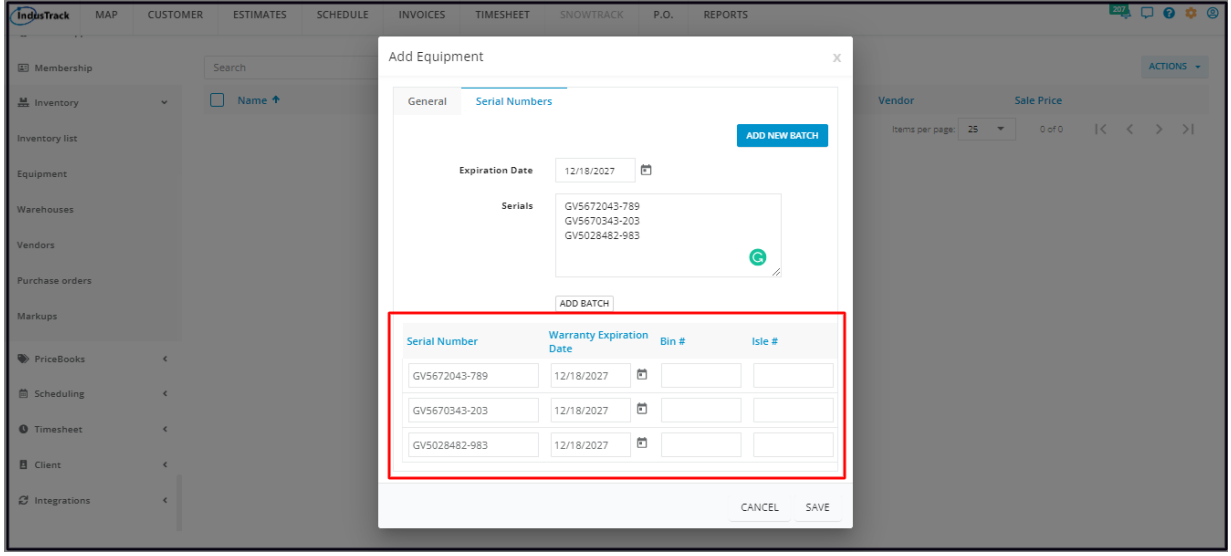


Serials

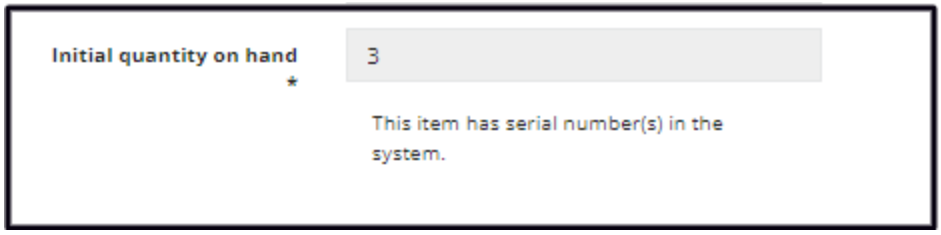
- Key in the serial number or numbers of the equipment at the Main Warehouse.
    - For multiple expiration dates, enter these and the serial numbers separately.



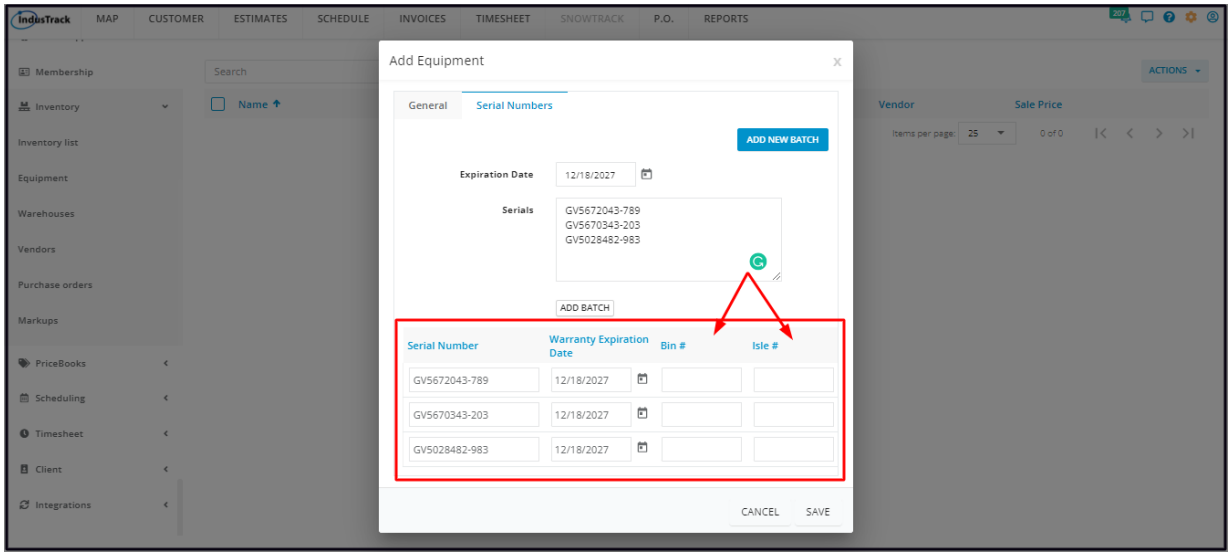
- Click **Add Batch** to save the serial number(s) and expiration number.



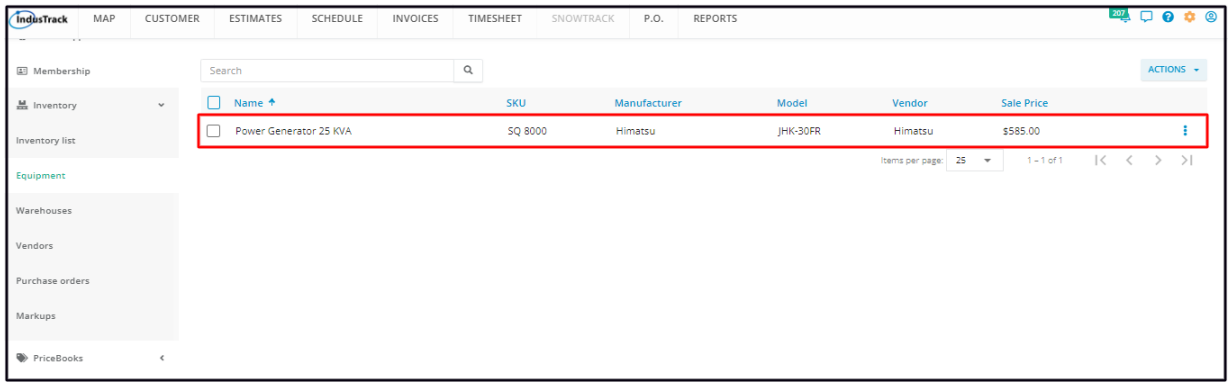
- From the General tab, the Quantity on Hand will be updated:
  - The heading will now read Initial Quantity on Hand
  - The quantity field will be disabled. Editing of the value will no longer be allowed.
  - A note will be added that the item has Serial Numbers recorded in the system.



- If the stock location information is already available, or if applicable, enter the **Bin #** and/or **Isle #**.



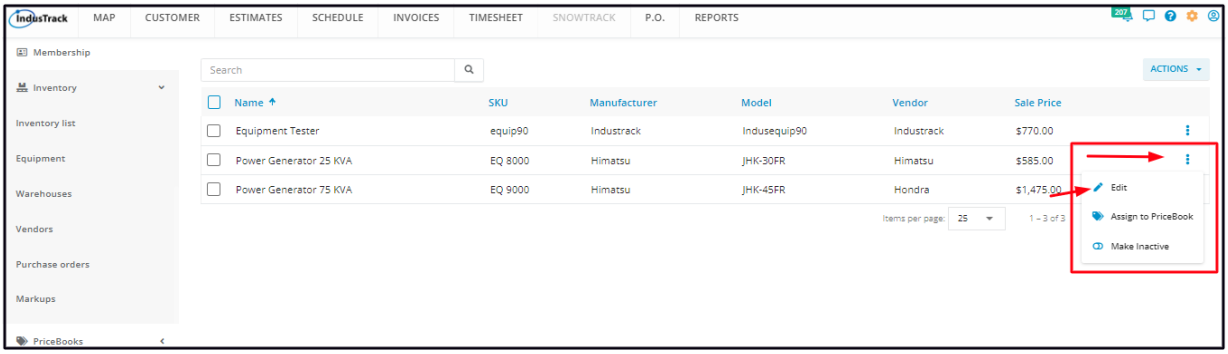
Save the new equipment record. This will be added to the Equipment List.



Update the Equipment Details

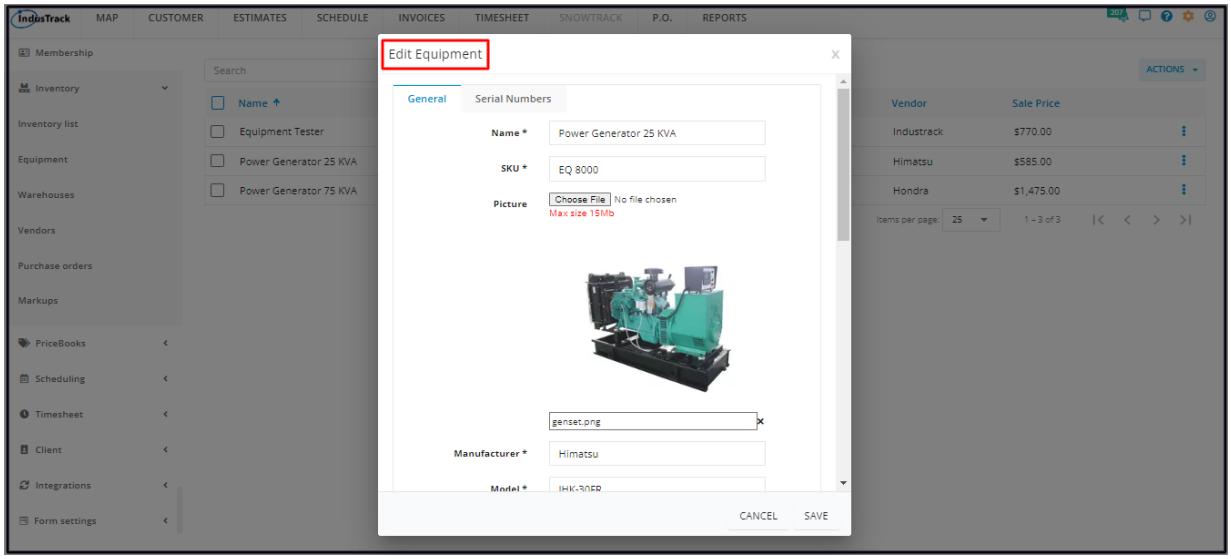
Find the equipment record to be updated from the list. Click anywhere on the row and the record will open in edit mode.

- Alternatively, go to the 3-dot menu to the right of the equipment record and select **Edit**.



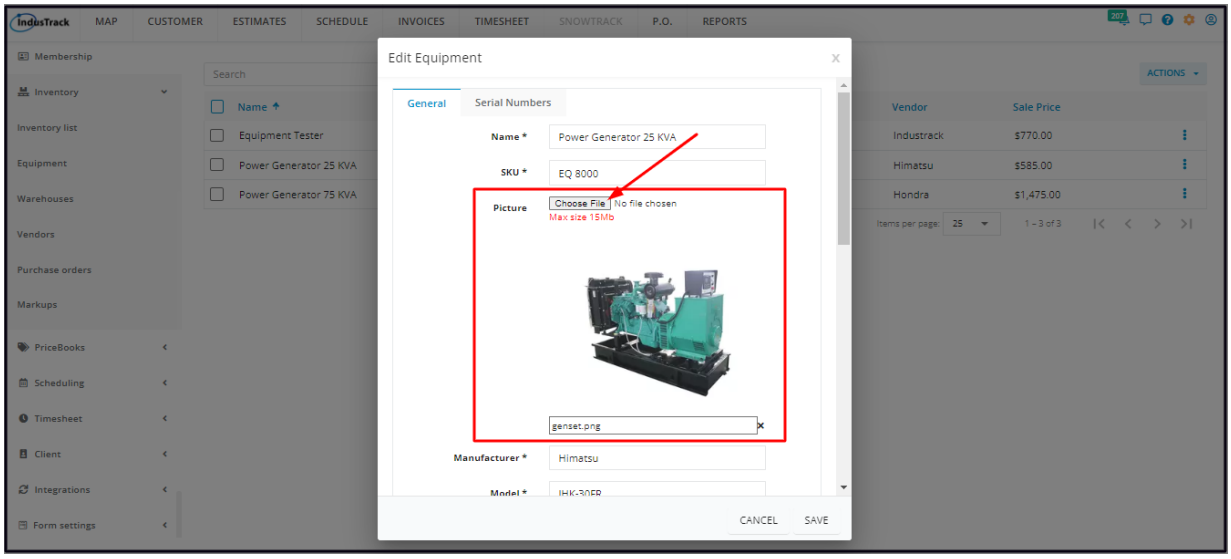
Edit/Update as may be needed. Once done, **Save** the changes.

- An inactive equipment record is not editable. This will have to be reactivated first.

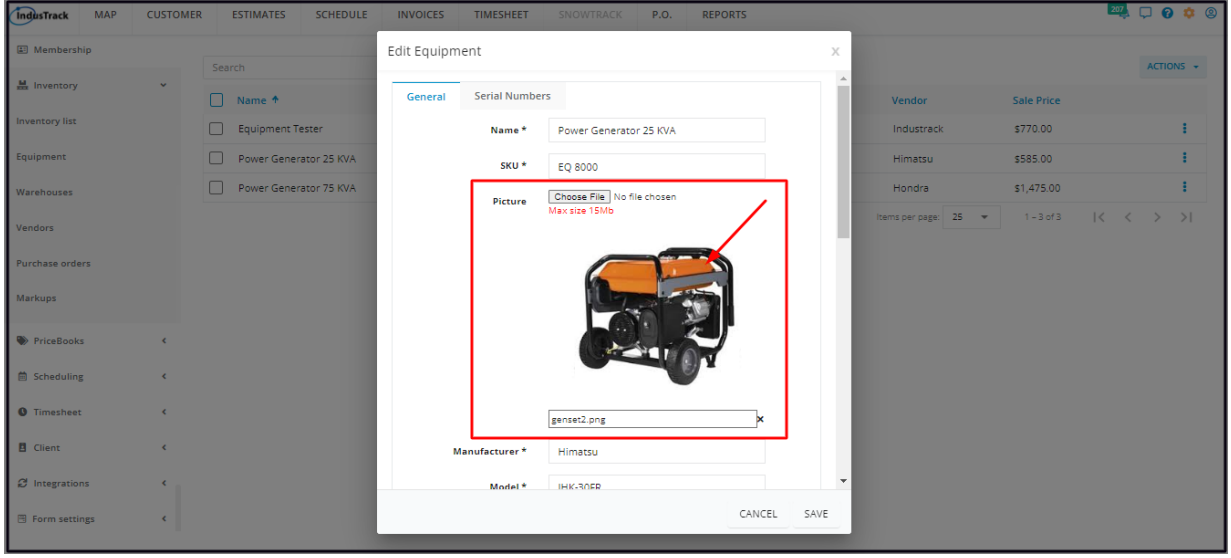


Change the Equipment Image

- From the Picture field, click **Choose File**.

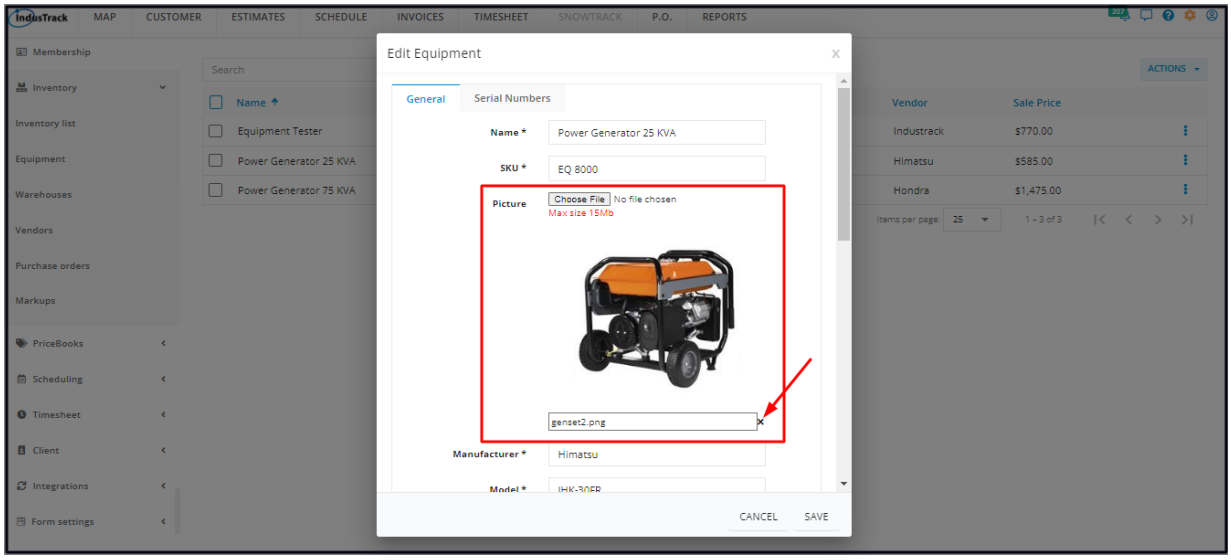


- Select the new image from your device. This will replace the current image. Save the changes.



Delete the Equipment Image

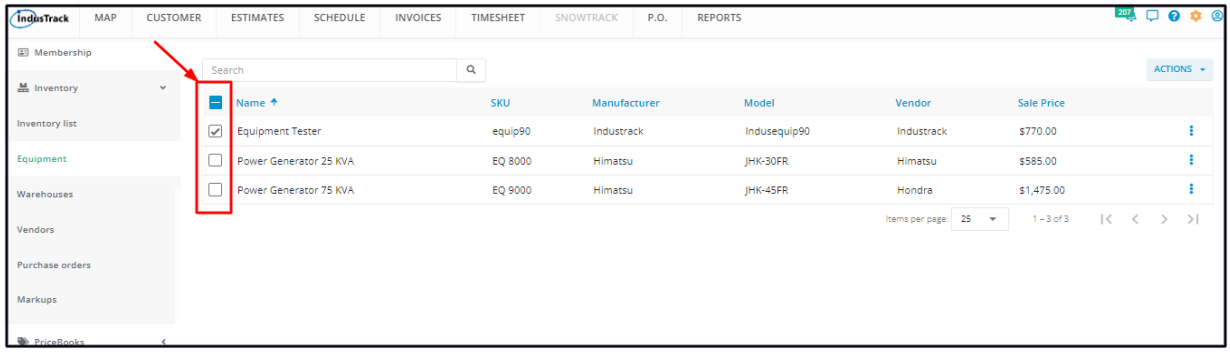
- Click the **delete icon (x)** to the right of the image name. This will remove the image from the window.
- Save the changes.



Deactivate an Equipment Record

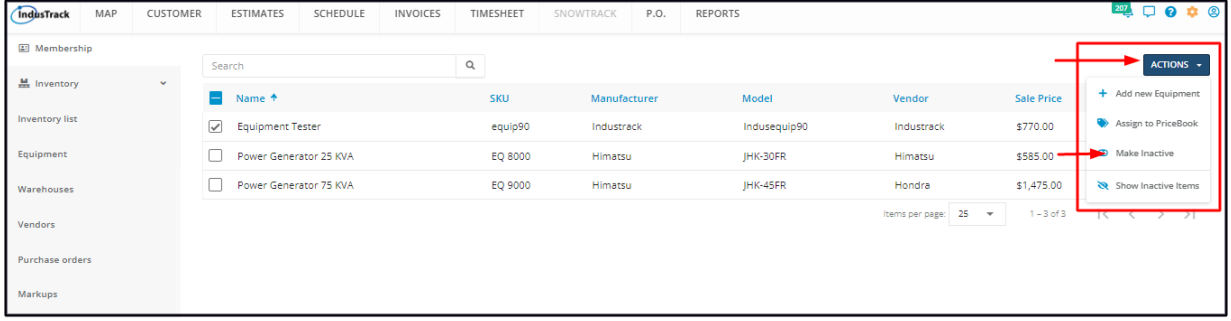
Deactivate an equipment record if the item will no longer be held in inventory. This is an option to take instead of deleting the record which could cause errors.

Find the equipment record to be deactivated from the list and tick the checkbox to its left.

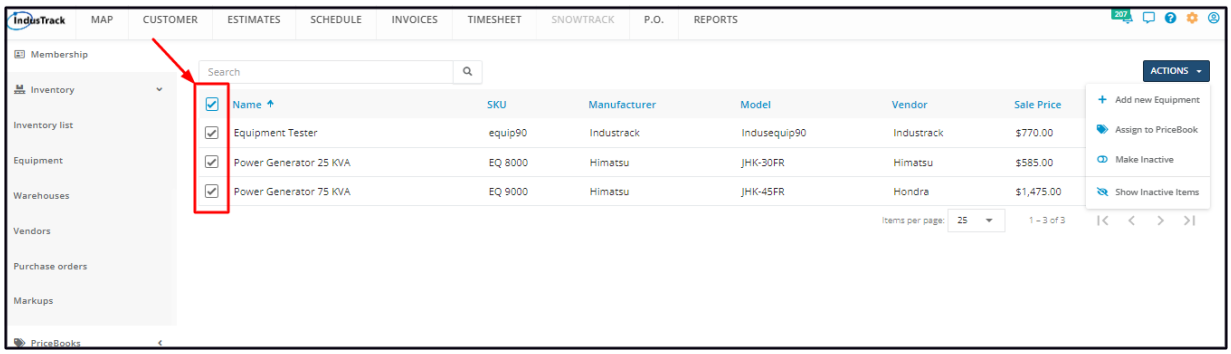


Go to the **Actions** button and select **Make Inactive**.

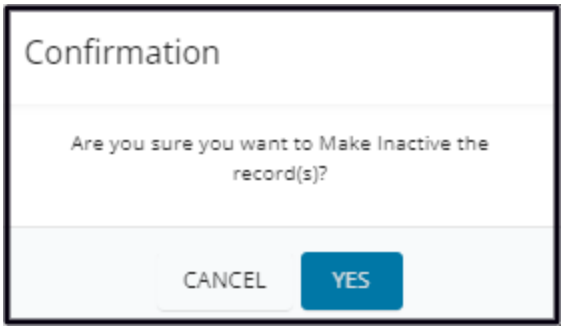
- *Alternatively, go to the **3-dot menu** to the right of the record and select **Make Inactive**.*



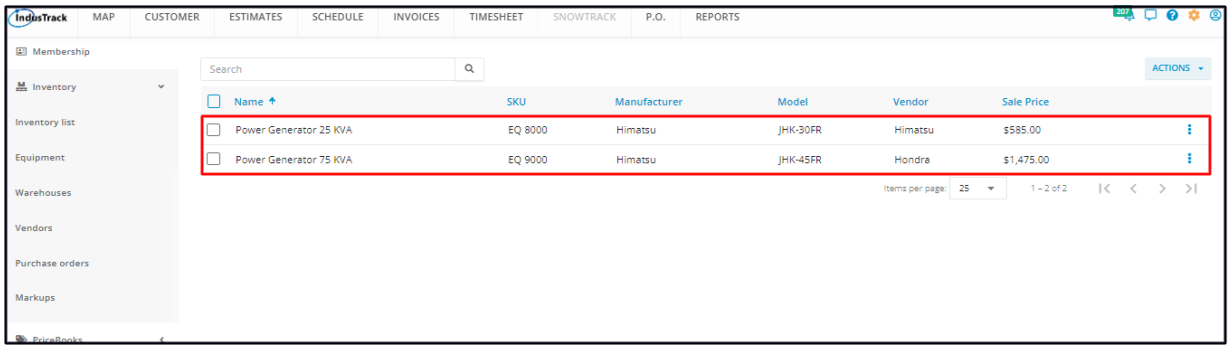
- *To deactivate multiple equipment records, tick the checkboxes to the left of all. If all records will be deactivated, just tick the checkbox of the Name header. And then go to the **Actions** button and select **Make Inactive**.*

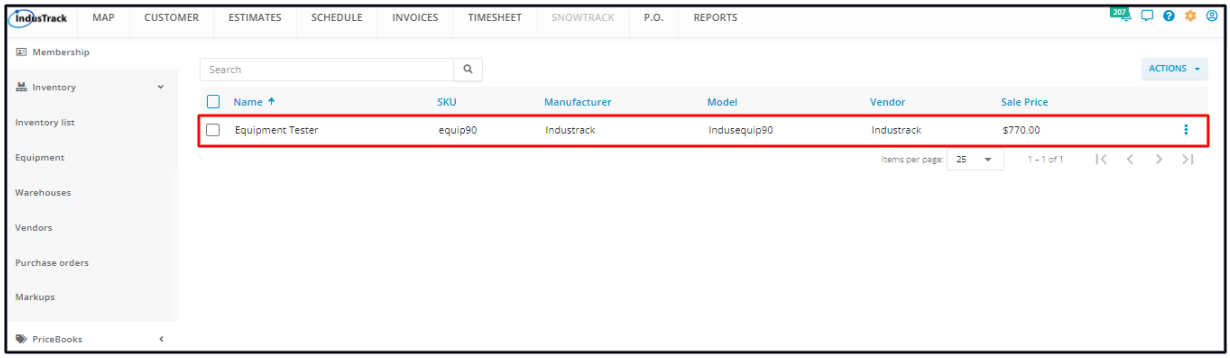


A warning window will come up. Click the **Yes** button to continue with the deactivation and **Cancel** to abandon the action.



The record will be removed from the **Active List** and moved to the **Inactive List**.

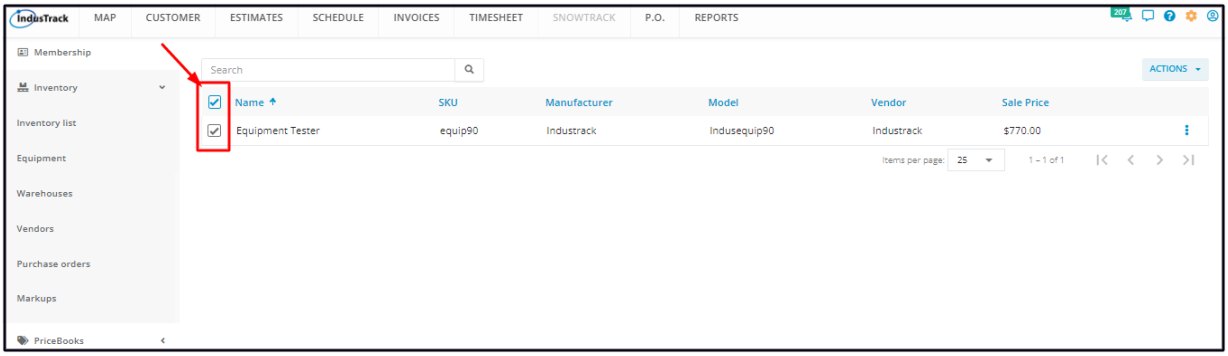




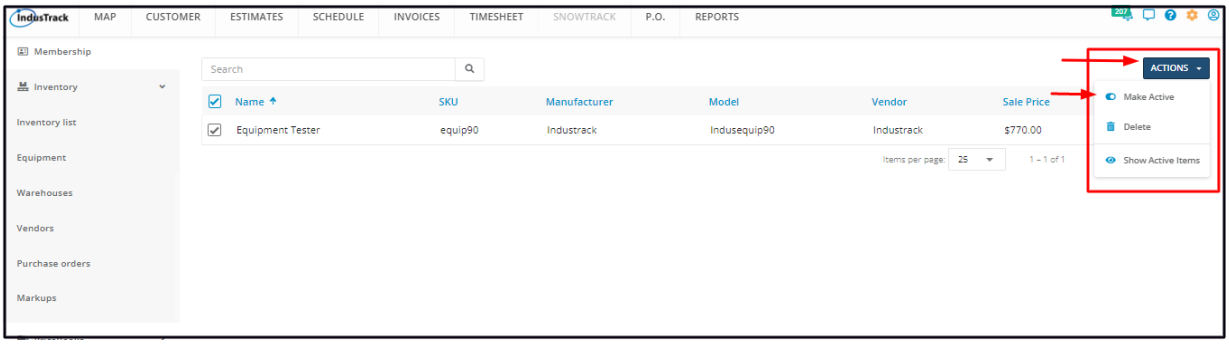
Reactivate a Deactivated Equipment Record

Go to the **Inactive Equipment List.**

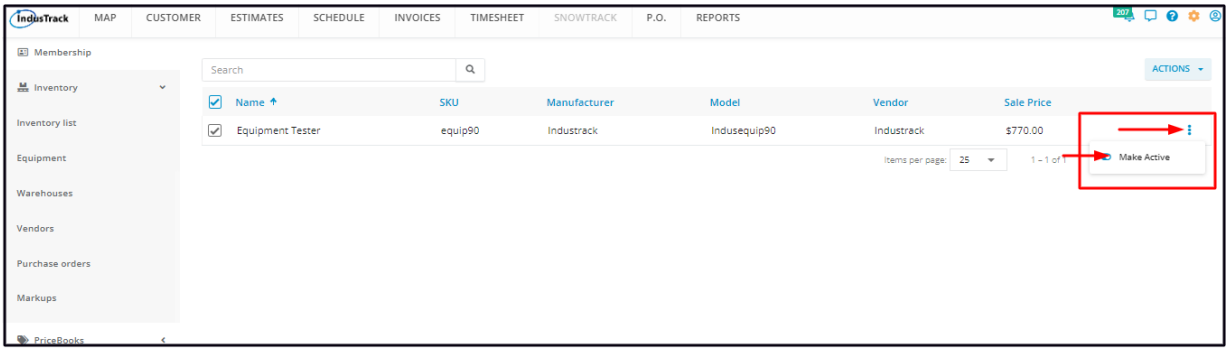
Find the equipment record to be reactivated from the list and tick the checkbox to its left.



Click the **Actions** button and select **Make Active**.

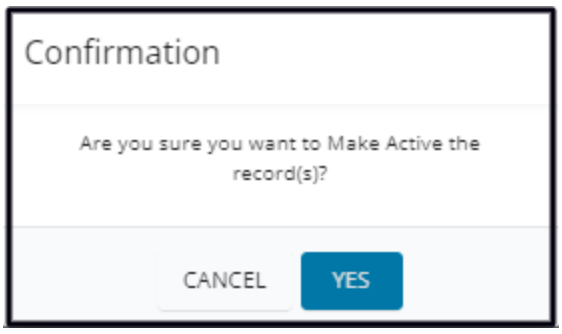


- *Alternatively, go to the **3-dot menu** to the right of the record and select **Make Active**.*

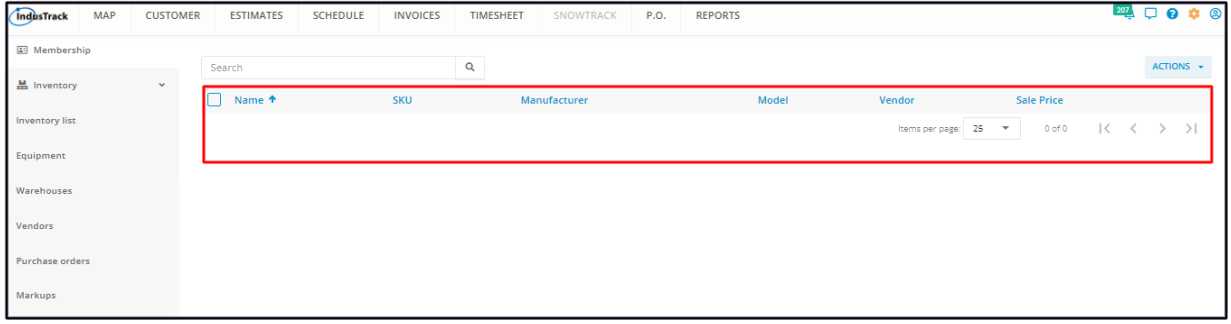


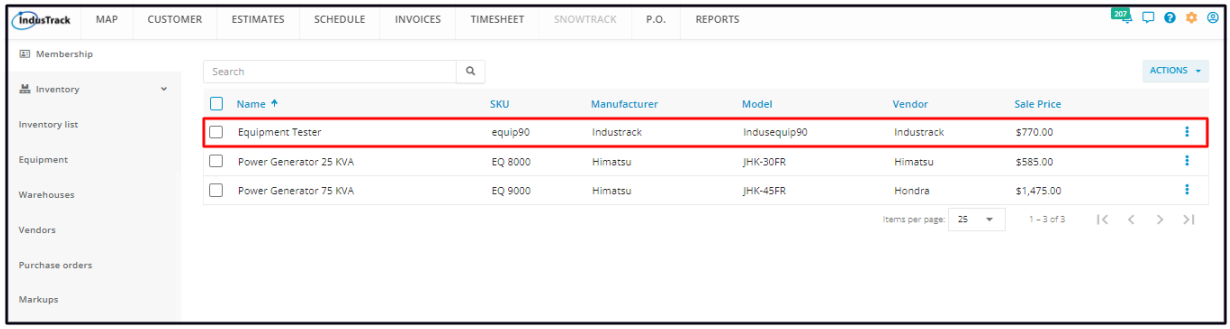
- *To reactivate multiple equipment records, tick the checkboxes to the left of all. If all items will be reactivated, just tick the checkbox of the Name header.*
- *Go to the **Actions** button and select **Make Active**.*

A warning window will come up. Click the **Yes** button to continue with the reactivation and **Cancel** to abandon the action.



The item will be removed from the **Inactive List** and moved to the **Active List**.





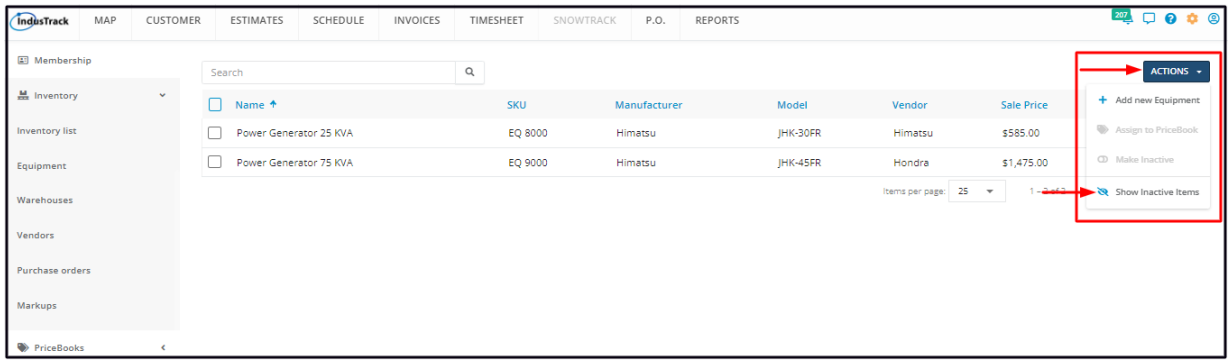
Update the equipment record and inventory as may be needed.

Delete an Equipment Record

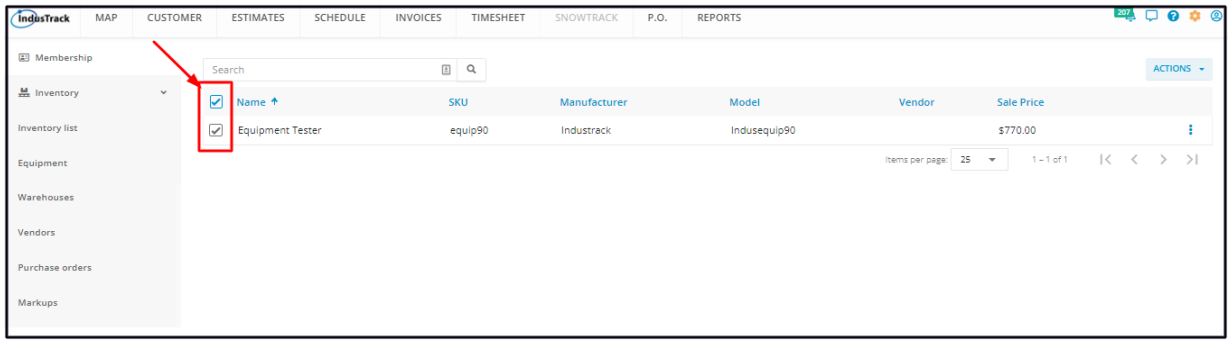
Delete an equipment record that is no longer in use or was created in error. It is wise to exercise caution when using this function. Deleting an equipment record may have an effect on other functions, settings or data.

If the record has an active status, **deactivate this first**. An Active Equipment Record cannot be deleted.

Move to the **Inactive Equipment Records** table.

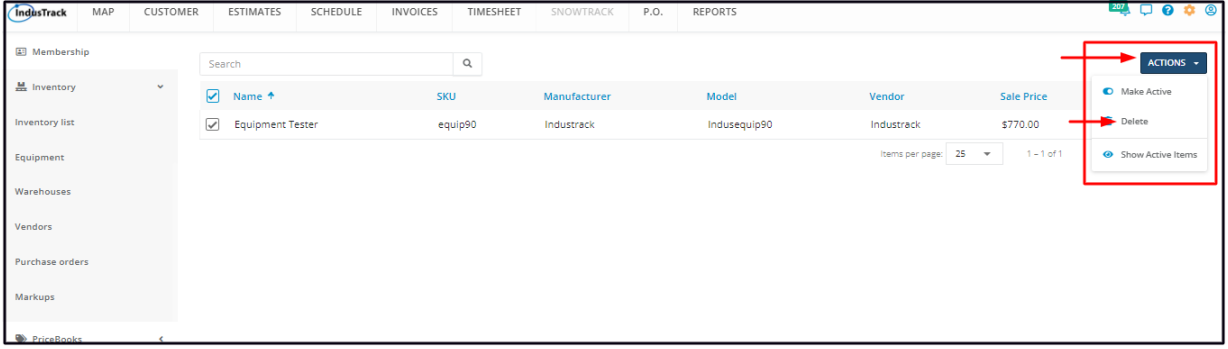


Find the Equipment Record to be deleted from the list, and tick the checkbox to its left.

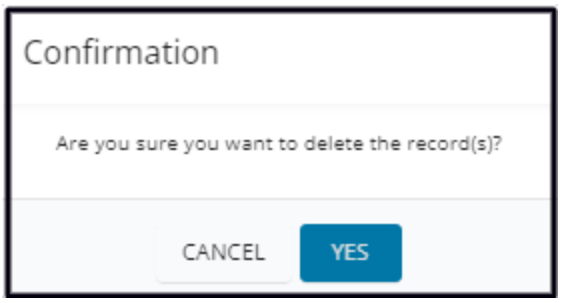


- *To delete multiple equipment records, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.*

Go to the **Actions** button, and select **Delete.**



A warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.



The record will be removed from the Inactive Equipment Records list.