From Registers/P&E/Plant & Equipment click **+ADD NEW** .

1. Select the Asset Type from the Menu – depending on the asset type chosen different fields will be displayed, see below for more details.
2. Type in an Asset No.
3. Type in the Registration/Serial No.
4. Select **Date Added**, this will default as todays date.
5. Click ✏ to add an image for the asset.
6. Type in the Description – for Motor Vehicles this will auto populate, section D below.
7. Select a State – this field is mandatory if "Using States" is selected in Company Settings.
8. **QR Codes** can be added by staff with certain security levels in the mobile app.
9. Status will default to Current and should only be change when an asset is sold or disposed of.
10. If applicable type in a Test & Tag ID No.

11. Tick if this asset will be a shared item, see below.
12. If this item has a Safety Data sheet, ticking the box will add an entry to the **Safety Data Sheet Database** where you can upload the required document.
13. If this item has an Equipment Manual, ticking the box will add an entry to the **Safety Equipment Manual Database** where you can upload the required document.
14. Tick if a Risk Assessment is required - see below.
15. Assigned To will default to Staff, change to location or Customer Site as required – see below.
16. When Staff is selected you can chose a Licence Type that is required to operate this item.
    If the staff member does not have a valid version of this licence type an error will display.
    Multiples can be choosen & they can be deleted.
17. If the asset requires regular plant inspections select the template to use.
    These are created in **Administration/Templates/Forms** .Only forms that have been locked will show in the list.
18. Select the appropriate PPE required when using this item. Multiples can be selected & use the X to remove items.

11. When Share Plant & Equipment is tick:
    a. The item will default to "Location Stored"
       Select one from the drop down list.
    b. Select a Pre Use Check List to be completed on the mobile app.
    c. Select a Post use Check List to be completed on the mobile app.

NOTE: the checklists are optional.

Items can be **Booked** on the web app, with **Collecting** and **Returning** being completed on the mobile app.

14. Risk Assessment: When the box for "Risk Assessment Required?" is ticked you will need to select a completed date and attach a PDF of the form completed.	☑ Is a Risk Assessment required? Date Assessment Completed 26/10/2021 ✕ 📅 Please attach completed assessment below as PDF (Add File)

15. Assigned to:
    a. Location Stored from the drop down list or click **+** to add a new one.
    b. Customer – select a Customer, Work site & Job No or click **+** to add a new ones.
 	
These assets will show in Project Management when it is ticked in your Company Settings.
	Assigned To ○ Staff **a** ⦿ Location Stored ⊕ ○ Customer
	Rear Shed ▾
	
	Assigned To ○ Staff ○ Location Stored ⊕ **b** ⦿ Customer
	Customer Work site
	Purple Submarine Ltd ▾ ⊕ ✎ Growing Fish ▾ ⊕ ✎
	Job No Project/Description
	2909ht ▾ ⊕ other testing

A. Disposing of Assets

- When an asset has been sold or disposed of open the item from the Plant & Equipment Register.

- Change the asset status as required.

- Select a Date & complete the Notes.

- Click 💾 **SAVE** .

When the status is anything other than "Current" the item will not be displayed in the P&E register.

All outstanding tasks i.e. registrations, insurance, maintenance items etc will all so be marked as archived.

Home / Registers / P&E / Plant & Equipment

Asset Type   Asset No
Fire Extinguishers & Hose Reels ▾   110

Asset Description
Fire Extinguisher Class C

Asset Status   Date   Asset Note
Disposed ▾   12/08/2020 ✕ 📅   sold to Mr Fred
    Current
    Destroyed
    Disposed
    Lost/Stolen
    Sold

Home / Registers / P&E / Plant & Equipment	To view items that are non-current tick the "Archived" box in the Plant & Equipment Register.

EXCEL   PDF   ▼ FILTER   ✛ GROUP   **Archived ☑**   Search...

Asset Type	Asset...	Registration/...	Description	Asset Status
Safety Equipment	11	na	Motorbike Helmut	Destroyed
Fire Extinguishers & Hose Reels	110	FC12356	Fire Extinguisher Class C	Disposed
Motor Vehicles	122	20023	Fiat-Punto-Pink	Sold
Tools & Equipment	1235	7657657657645	Still vac blower	Lost/Stolen
Motor Vehicles	144	20025	Mclaren-P1-Orange-Orange	Sold
Tools & Equipment	8	AEG12563	AEG Power Drill Battery	Lost/Stolen

B. Fire Extinguishers & Hose Reels

Select the type of Fire Extinguishers/Hose Reels Types under Assigned To.

You can select as many of the types that apply to the extinguisher or reel from the drop-down list.

Clicking on the **Fire Equipment Maintenance** button will add this item to the maintenance register for regular checks (section B).

Fire Extinguishers/Hose Reels types can be edited in:
Administration/Asset Management/Fire Extinguisher/Hose Reels.

Assigned To ⦿ Staff ○ Location Stored ⊕
▾

Extinguisher/Hose Reel Type

CLASS B - USED FOR FLAMMABLE OR COMBUSTIBLE LIQUIDS ✕ ✕
CLASS D - COMBUSTIBLE METALS (LABORATORIES) ✕
|

FIRE EQUIPMENT MAINTENANCE

C. Lifting Equipment

1. Serial Number – serial number if required in addition to Registration No
2. Year of Manufacture – What year was it made
3. Registration Due Date – select from date picker (if road registered)
4. Insurance Company Name – Name of insurer
5. Policy Number – insurance policy number
6. Policy Expiry Date – date insurance policy expires
7. Roadworthy Certificate – certificate number (if applicable)
8. Roadworthy Expiry Date – date roadworthy expires (if applicable)
9. To add tasks to Plant & Equipment Maintenance, Test & Tag and RCD Testing registers click on the blue buttons.

1 SerialNumber: 895623	**2** Year Manufacture: 2015	**3** Registration Due Date: 24/09/2021
4 Insurance Company Name: Sunweb Ins	**5** Policy Number: SW02134	**6** Policy Expire Date: 24/09/2021
7 RoadWorthy Certificate Number: RWC78999	**8** RoadWorthy Expire Date: 24/09/2021	

9 [PLANT & EQUIPMENT MAINTENANCE] [TEST & TAG] [RCD TESTING]

Registration and Insurance Documents can be added in the section below.

Click **+ADD FILE** to add documents and use the **Action** buttons to change as required.

These will now be available to users in the mobile app under **Documentation/Lift Equipment & Vehicle Documents**

Registration & Insurance Documents   ❂ ADD FILE

	Last Modified Time	Title	Description	Action
	09/09/2020 10:07	vehicle reg.jpg	mazda vehicle reg	☁ ☁ 🗑

D. Motor Vehicles & Trailers

1. Make – Brand of the vehicle (Ford, Mitsubishi, Dodge, Mazda, etc.
2. Model – Name of the Vehicle (Pajero, Prado, Land cruiser, etc)
3. Year of Manufacture – What year was it made
4. Colour – Colour of the vehicle, refer to registration papers if required.
5. Kilometres –odometer reading when asset acquired – optional field.
6. Registration Due Date – select from date picker (if road registered)
7. Insurance Company Name – Name of insurer
8. Policy Number – insurance policy number
9. Policy Expiry Date – date insurance policy expires
10. Roadworthy Certificate – certificate number (if applicable)\
11. Roadworthy Expiry Date – date roadworthy expires (if applicable)
12. Once the item is complete you can click the **Vehicle Maintenance** button to add the asset to the "Maintenance Register".

1 Make: Mazda	**2** Model: 323	**3** Year Manufacture: 2017
4 Colour: Pink	**5** Kilometres: 12,000	**6** Registration Due Date: 24/09/2021
7 Insurance Company Name: AA Ins	**8** Policy Number: 90890	**9** Policy Expire Date: 24/09/2021
10 RoadWorthy Certificate Number: RWC8956	**11** RoadWorthy Expire Date: 24/09/2021	

12 [VEHICLE MAINTENANCE]

The Asset Description will be blank when you select Motor Vehicle as the asset type. Once you have completed the Make, Model & Colour fields these will create the description as per below	**Asset Type** Motor Vehicles ▼ **Asset Description** - - **Asset Description** Mazda-323-Pink

Registration and Insurance Documents can be added in the section below.
Click **+ADD FILE** C to add documents and use the **Action** buttons to change as required.
These will now be available to users in the mobile app under **Documentation/Lift Equipment & Vehicle Documents**.

Registration & Insurance Documents							**⊕ ADD FILE**
	Last Modified Time	Title		Description		Action	
	09/09/2020 10:07	vehicle reg.jpg		mazda vehicle reg		☁ ☁ 🗑	

Where an asset has been assigned to a Staff Member they can view it in the mobile app in Registers/Plant & Equipment.
They can also book, collect and return Shared Plant & Equipment on the mobile app.

NOTES:

- Assets can have as many maintenance items as required, these can be reoccurring or one-off and can be added directly to the **Maintenance Register.**
- Click these links to see how to add **Safety Data Sheets** and **Equipment Manuals**.

- Typing in the Search Box on the grid page will help you quickly find a particular asset. - You can also use the **filters** to find items and export lists.	**📄 EXCEL** **📄 PDF** **▼ FILTER** **✛ GROUP** Archived ☐ Maz | Asset Type	Asset...	Registration/...	Description
---	---	---	---
Motor Vehicles	111	20022	Mazda-323-Green
Motor Vehicles	190912	XXX555	Mazda-323 3 Door Hatch-Orange	

- Click **+ADD FILE** if you need to upload other documents for this asset.
  Use the **Action** buttons to change as required.

Documents							**⊕ ADD FILE**
	Last Modified Time	Title		Description		Action	
	08/12/2020 12:23	receipt.png		purchase receipt		☁ ☁ 🗑	

- Scrolling past documents will show you a full list of tasks completed for this asset
  i.e. maintenance, testing, & repair history, daily plant inspections etc.

Maintenance, Repair & Testing History

Staff	ThirdParty	MaintenanceType	Vehicle Maintenance Type	Maintenance Description	Odometer Reading	Completed Date	ServiceNote	
Super Women		Vehicle Maintenance	Log Book Maintenance	Oil Check	35869	12/02/2020	Good	🔍

Repair History:

Plant & Equipment Register	Name of Repairer	Fault / Damage	Repairs Required	Repair Date
Asset No : 2 , Reg No : 2ht , Description : Ferguson T-20	Fixit Better Ltd	seat broken	Glued it together	13/09/2020
Asset No : 2 , Reg No : 2ht , Description : Ferguson T-20	Fixit Better Ltd	Top oil up	Completed	23/09/2020

Daily Plant Inspections

Description	Asset No	Registration/Serial No	Date & Time Inspected	Staff	Signed Off	
Ferguson T-20	2	2ht	23/09/2020 07:26	Kermit Frog	☑	🔍