

## Adding Equipment

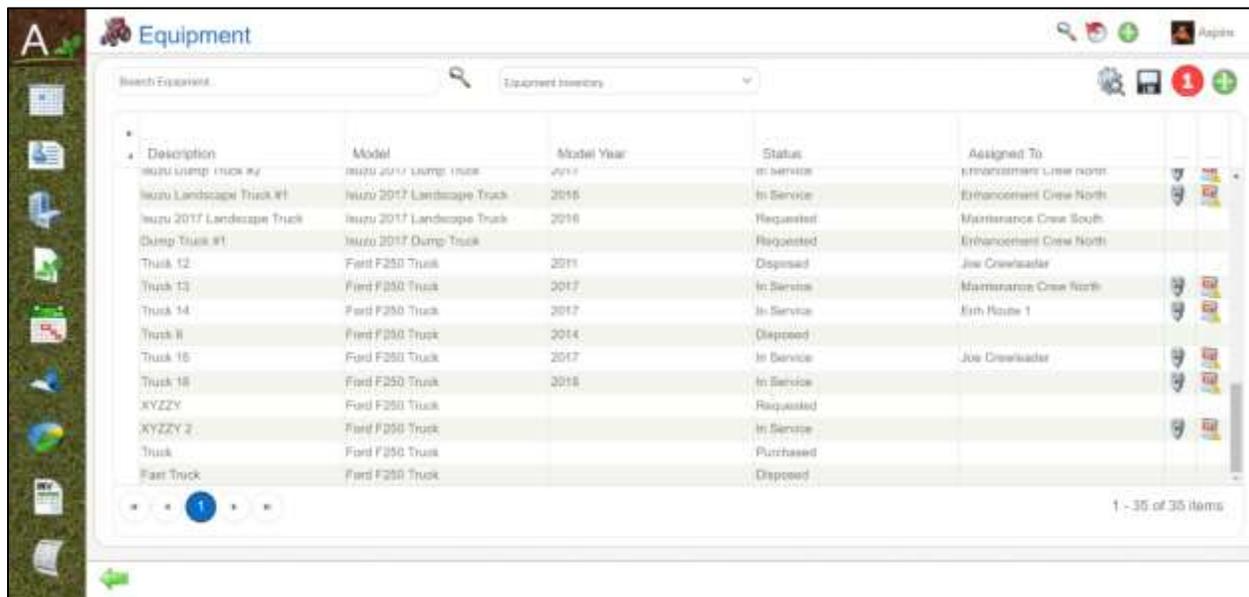
This document will go through the workflow of adding a piece of Equipment. Depending upon the process step, several users with different roles may be involved in the process.

### Prerequisites

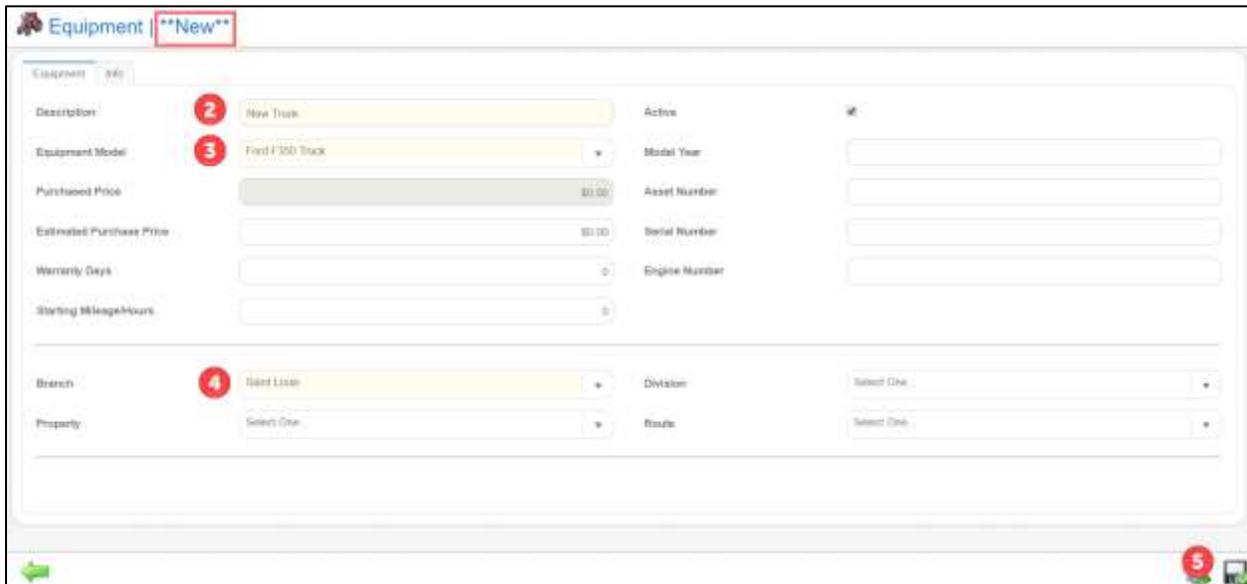
Depending on the process step, a role will need, View Equipment, Request Equipment, Approve Equipment, Purchase Equipment, Mark Equipment In Service.

**To Add a New piece of Equipment, follow these steps:**

1. Go to the Equipment module and click on the Green Plus

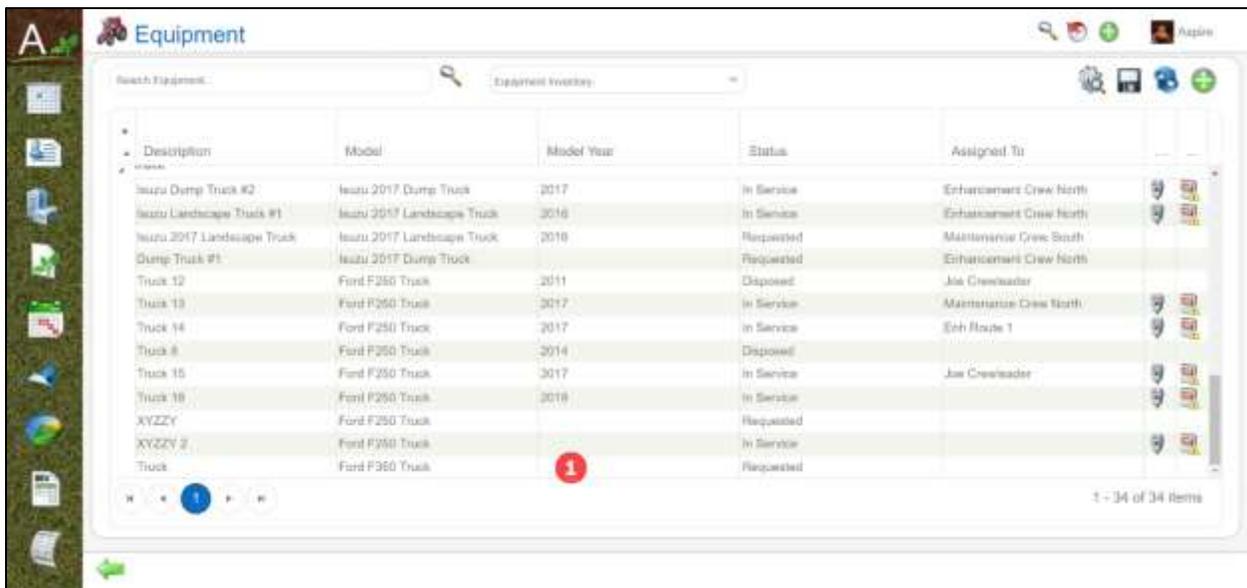


2. Type in a name for the Equipment's Description
3. Select the Equipment Model
4. Pick the Branch that this piece of equipment will belong to. Fill out any of the non-mandatory fields if possible/desired
5. Press the disk to Save



**To Approve a piece of Requested Equipment, follow these steps:**

1. Find the Requested Equipment. Filter your list by the Status Requested can be helpful



Description	Model	Model Year	Status	Assigned To
Isezu Dump Truck #2	Isezu 2017 Dump Truck	2017	In Service	Enhancement Crew North
Isezu Landscape Truck #1	Isezu 2017 Landscape Truck	2016	In Service	Enhancement Crew North
Isezu 2017 Landscape Truck	Isezu 2017 Landscape Truck	2016	Requested	Maintenance Crew South
Dump Truck #1	Isezu 2017 Dump Truck		Requested	Enhancement Crew North
Truck 12	Ford F250 Truck	2011	Disposed	Jim Crewleader
Truck 13	Ford F250 Truck	2012	In Service	Maintenance Crew North
Truck 14	Ford F250 Truck	2017	In Service	Erh Route 1
Truck 8	Ford F250 Truck	2014	Disposed	
Truck 15	Ford F250 Truck	2017	In Service	Jim Crewleader
Truck 16	Ford F250 Truck	2018	In Service	
XYZZY	Ford F250 Truck		Requested	
XYZZY 2	Ford F250 Truck		In Service	
Truck	Ford F350 Truck		Requested	

2. Change the Description to be more specific if allowed
3. Enter in an Estimated Purchase Price if desired
4. Hover over the Action Gear
5. Select Approve

Equipment | Truck (Requested)

Equipment info

Description: Truck 20 Active

Equipment Model: Ford F350 Truck Model Year:

Purchased Price:  \$0.00 Asset Number:

Estimated Purchase Price: 3  \$50,000.00 Serial Number:

Warranty Days:  0 Engine Number:

Starting Mileage/Hours:

Branch: Saint Louis Division: Select One...

Property: Select One... Route: Select One...

Fuel: Gas List:  (Purchase Service Price:  \$0)  Checkboxes

5 Approve...  
Purchase...  
Mark as Service...  
Delete Equipment...

4

6. Press the Green checkmark to approve purchase of this Equipment

Requested)

Truck 20 Active

Ford F350 Truck

Saint Louis

Select One... Route: Select One...

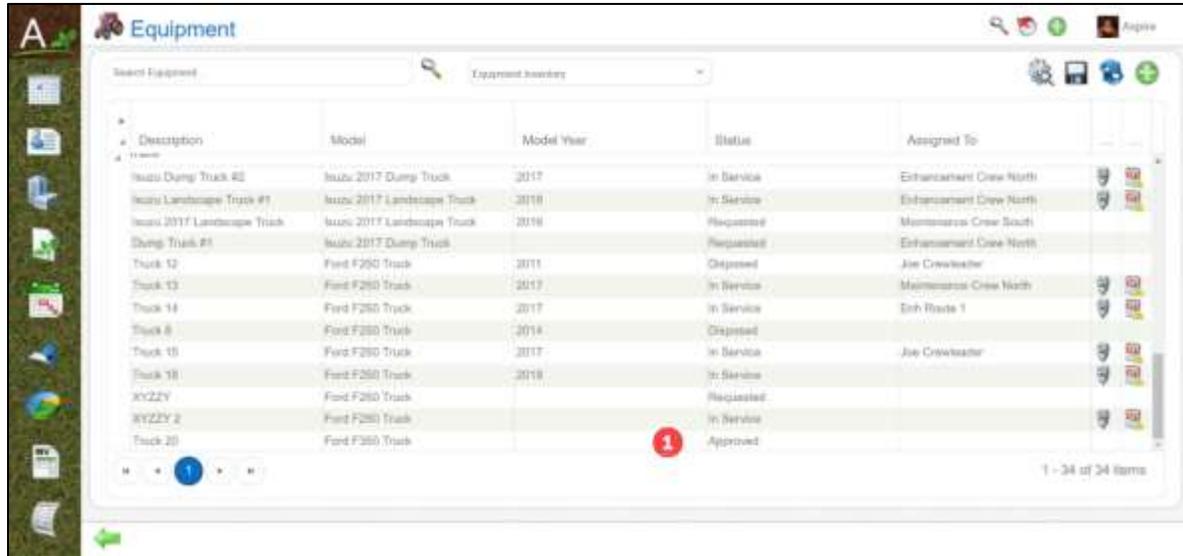
6

Confirm

Are you sure you want to approve this equipment?

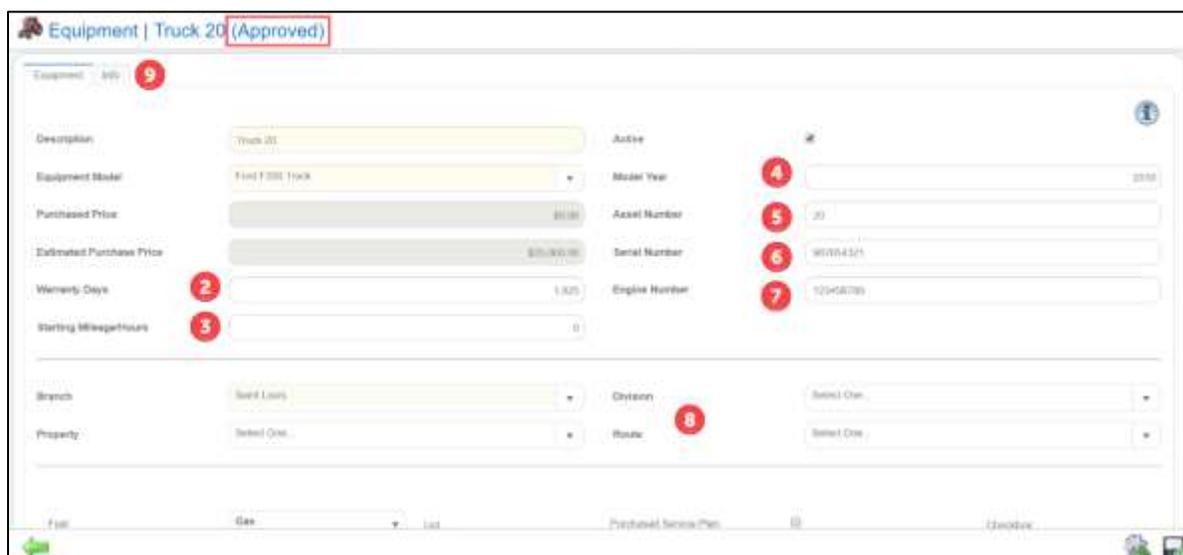
**To Purchase a piece of Approved Equipment, follow these steps:**

1. Find the Approved Equipment. Filter your list by the Status Approved can be helpful



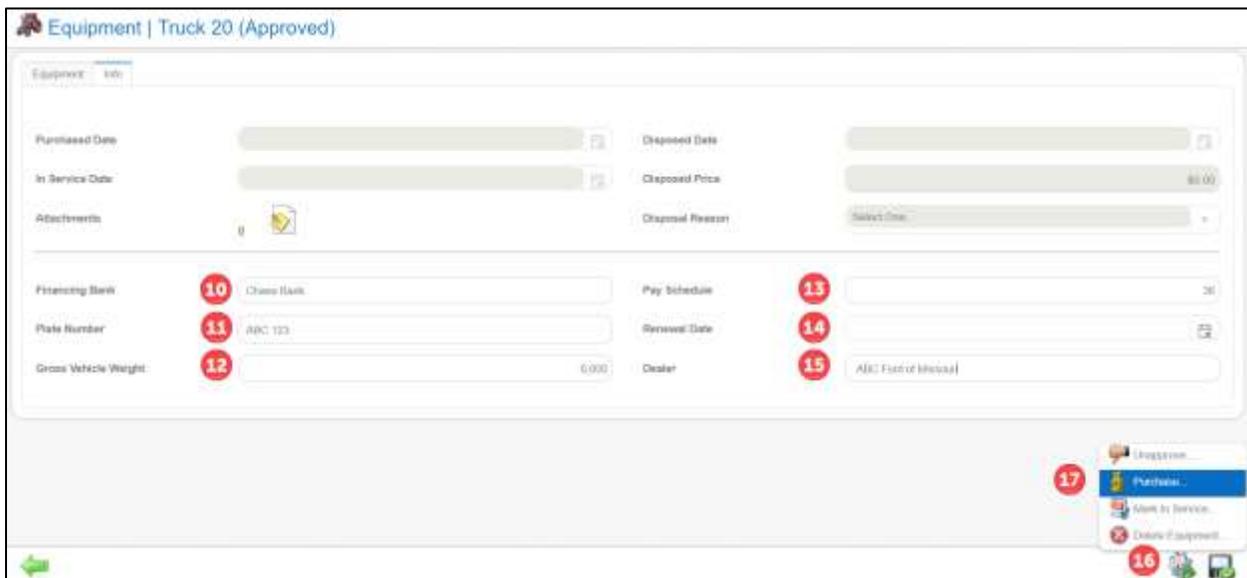
Steps 2-9 are not mandatory, but the more information entered the better for reporting purposes.

2. Type in the amount of days of the warranty
3. Type in the Starting Mileage of Hours the equipment has
4. Type in the Model Year
5. If you have an organization labeling system for your equipment, then enter it in the Asset Number
6. Type in the Serial Number
7. Type in the Engine Number if you can find it
8. Select if this piece of Equipment belongs to any specific Property, Division, or Route
9. Select the Info tab

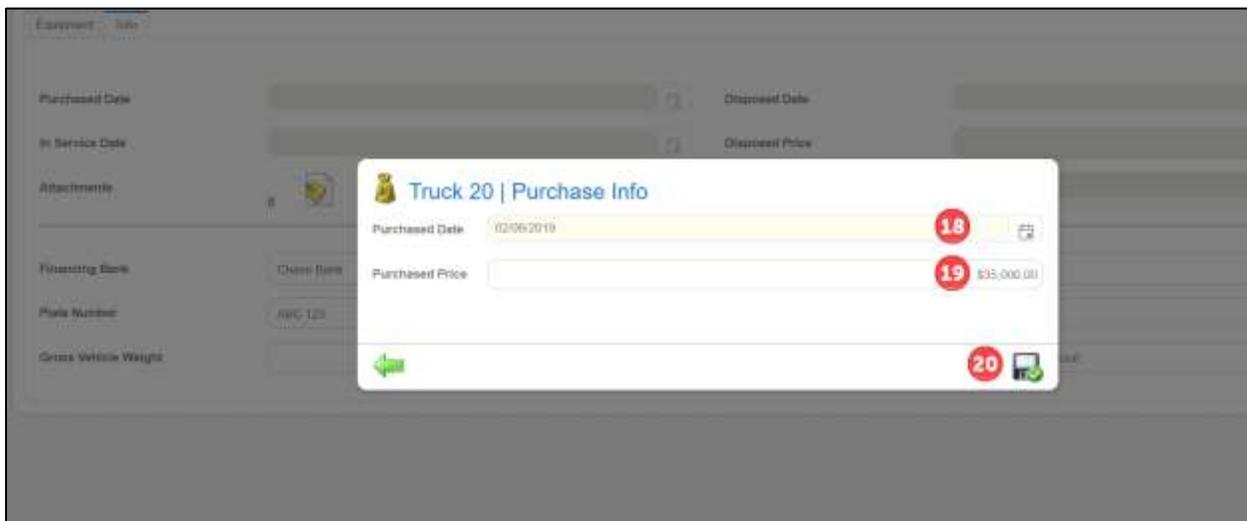


Steps 10-15 are not mandatory, but the more information entered the better for reporting purposes. Steps 16-17 are mandatory.

10. Type in the bank (if any) where the loan is being financed through
11. Type in the license Plate Number
12. Type in the Vehicle's Gross Weight
13. Type in how many months the loan is
14. Type in the date when the license plates need to get renewed
15. Type in who you bought the Equipment from
16. Hover over the Actions Gear
17. Select Purchase

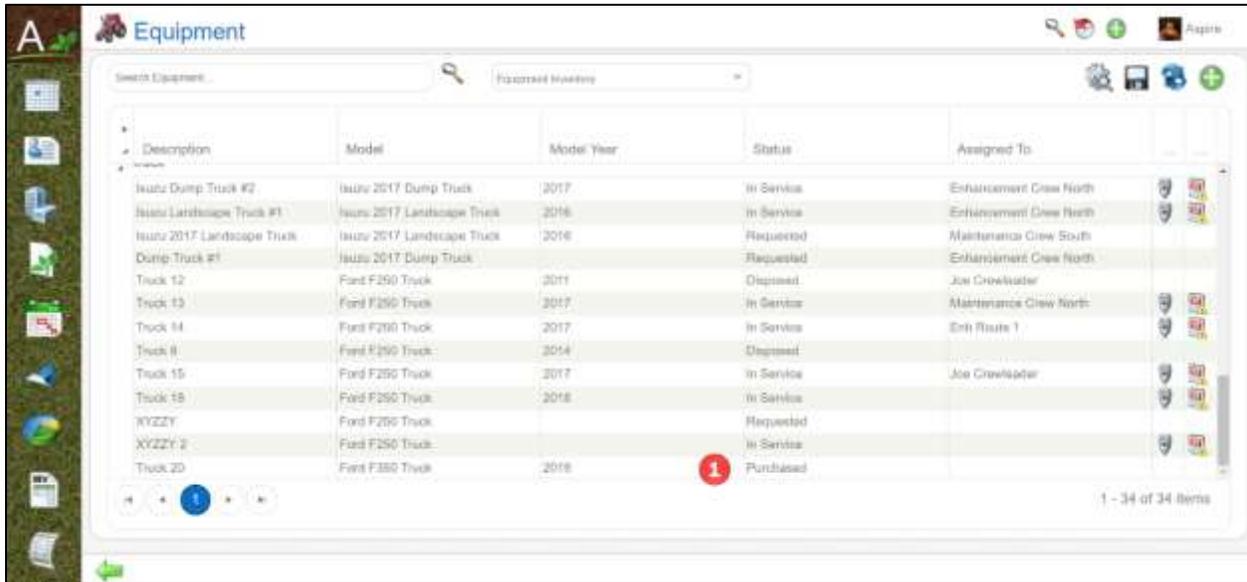


18. Select the Purchased Date
19. Type in the Purchase Price
20. Press the Disk to Save

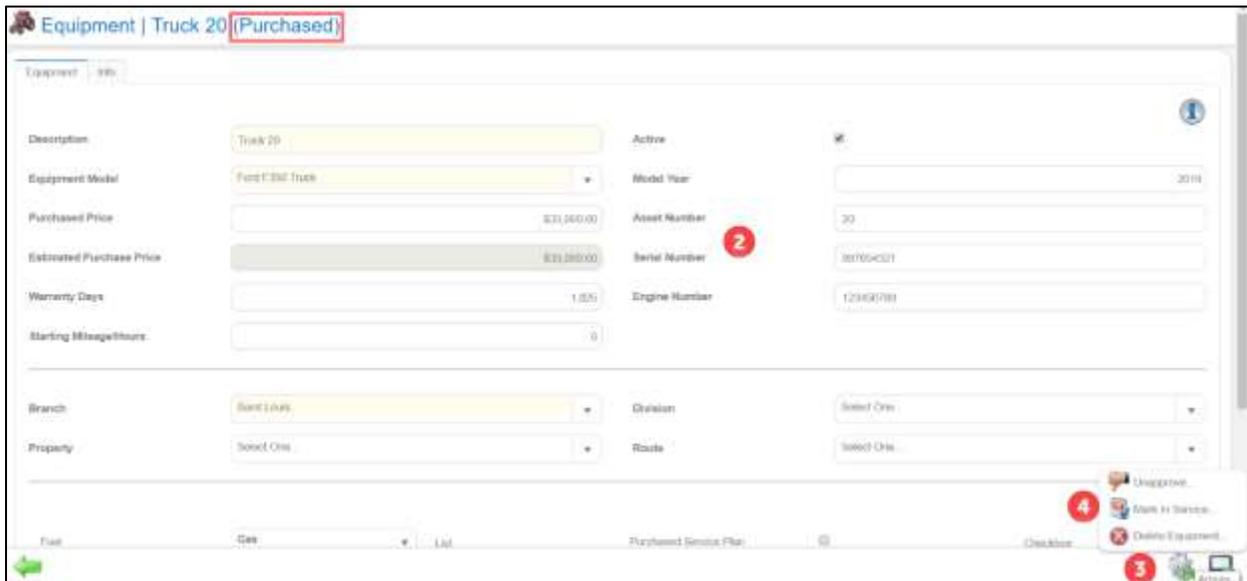


**To Mark a piece of Purchased Equipment in Service, follow these steps:**

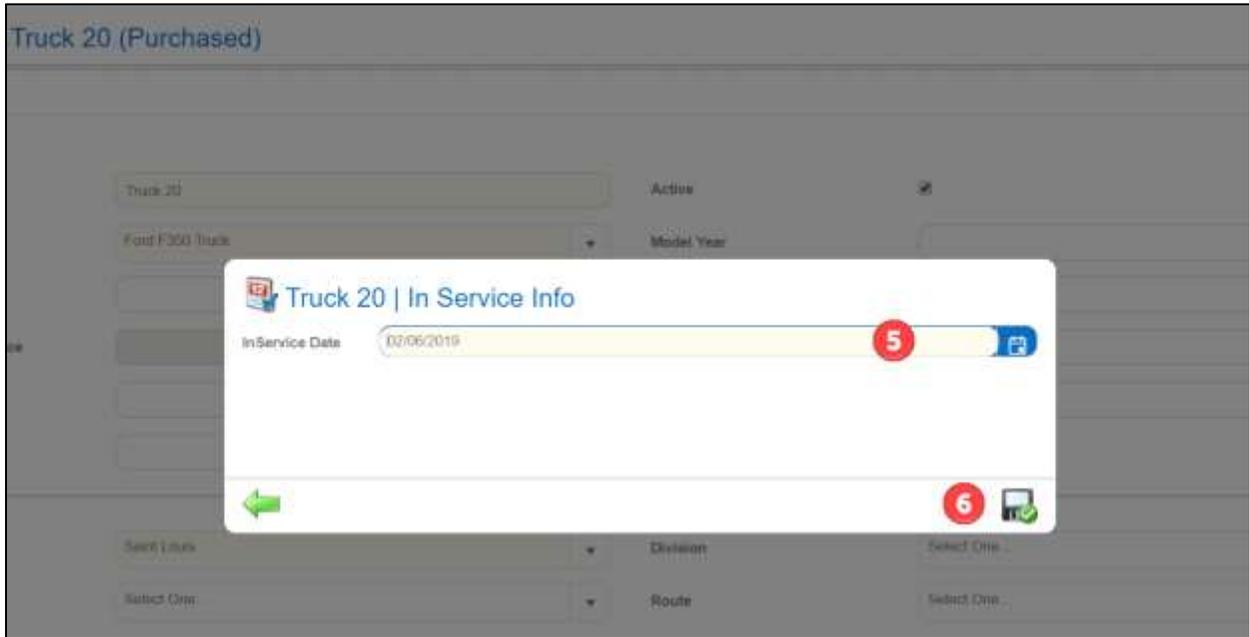
1. Find the Purchase Equipment. Filter your list by the Status Purchased can be helpful



2. Fill in any information need by your company on the Equipment and Info tabs
3. Hover over the Actions Gear
4. Select Mark in Service



5. Select the date that the Equipment will start its Service
6. Press the disk to Save



### 7. The Equipment is now In Service

