

# Adding New Assets to IT Management Software

This guide provides step-by-step instructions on how to add new assets to IT management software. It includes detailed instructions on entering information such as product name, model, brand, purchase price, serial number, and proof of purchase. Following this guide will help users efficiently and accurately add new assets to their IT management software.

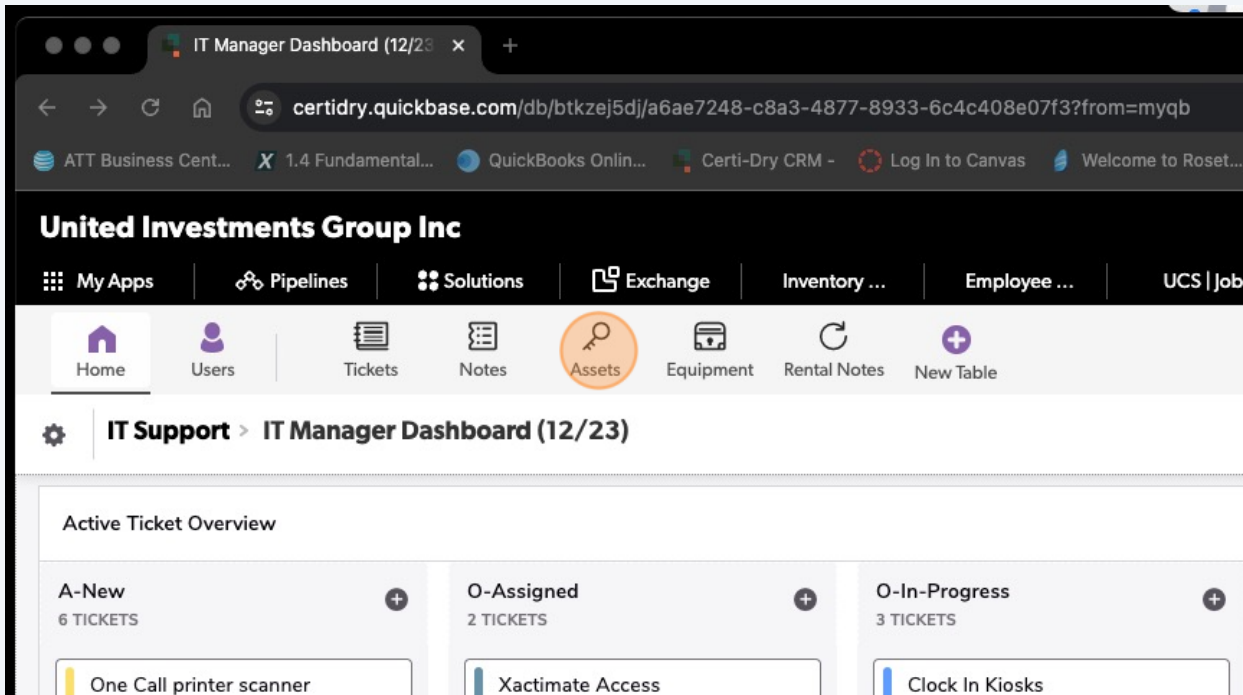
Updated by: Jennifer Meyer August 2, 2024

1

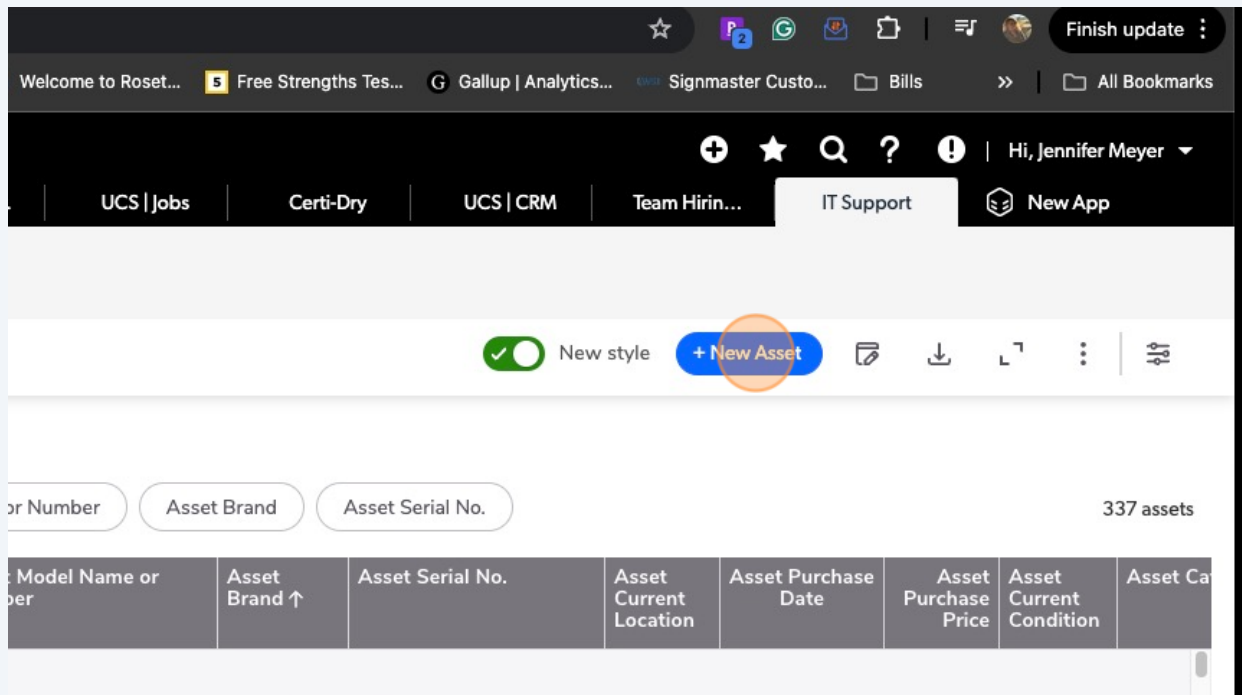
On the IT Support Home Application: <https://certidry.quickbase.com/db/btkzej5dj/a6ae7248-c8a3-4877-8933-6c4c408e07f3>

2

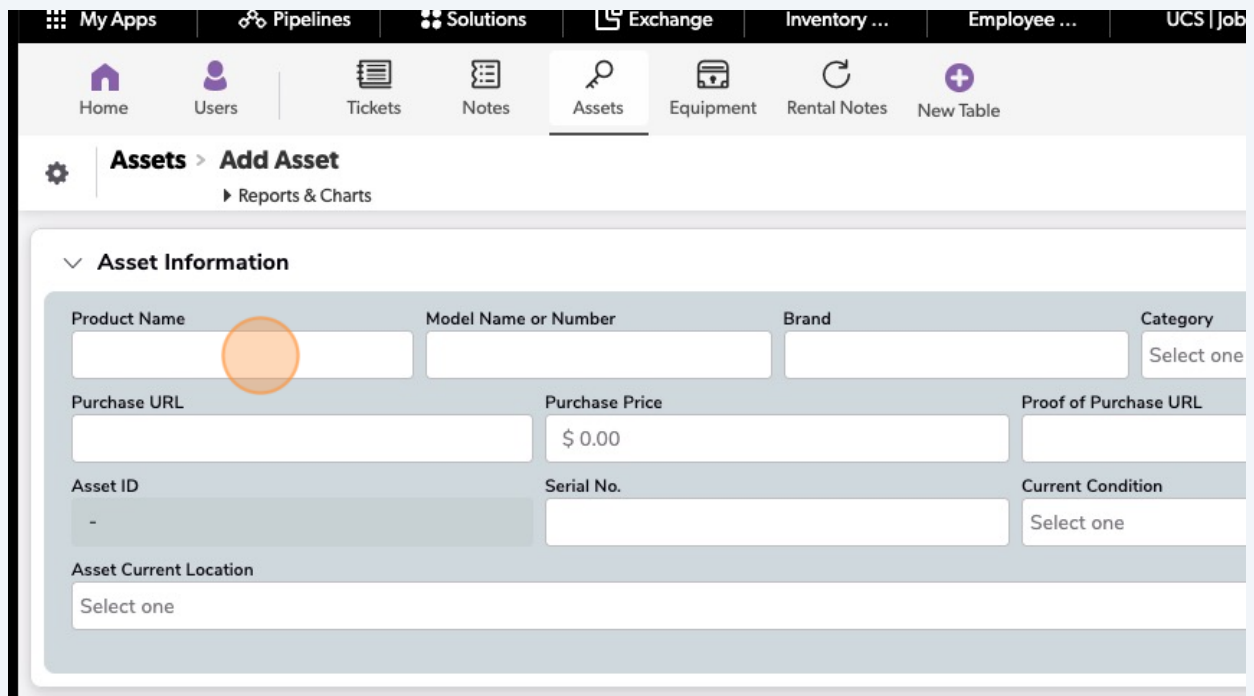
Click Assets



### 3 Click "New Asset"



### 4 Type in the Product Name in "Product Name"



5 Type in what type of item you're adding to the asset system

6 Click "Model Name or Number" and type in the model and name of the asset. For example: "iPad Air 13"

The screenshot shows a web application interface for adding a new asset. The top navigation bar includes links for My Apps, Pipelines, Solutions, Exchange, Inventory, Employee, and UCS | Job. Below this is a secondary navigation bar with icons for Home, Users, Tickets, Notes, Assets (highlighted), Equipment, Rental Notes, and New Table. The main content area is titled 'Assets > Add Asset' with a sub-link for 'Reports & Charts'. The 'Asset Information' section contains several input fields: 'Product Name' (filled with 'iPad Air 13'), 'Model Name or Number' (highlighted with an orange circle), 'Brand', 'Category' (a dropdown menu), 'Purchase URL', 'Purchase Price' (filled with '\$ 0.00'), 'Proof of Purchase URL', 'Asset ID' (filled with '-'), 'Serial No.', 'Current Condition' (a dropdown menu), and 'Asset Current Location' (a dropdown menu).

7 Click "Brand" from the dropdown box and select the correct brand.

The screenshot shows the 'Assets' form in a software application. The 'Brand' dropdown menu is open, and an orange circle highlights the selection area. The form includes fields for Model Name or Number (containing 'Air 13'), Purchase Price (\$ 0.00), Serial No., Proof of Purchase URL, and Current Condition (a dropdown menu). The top navigation bar shows 'Solutions', 'Exchange', 'Inventory ...', 'Employee ...', 'UCS | Jobs', 'Certi-Dry', and 'UCS'. The left sidebar has 'Tickets', 'Notes', 'Assets', 'Equipment', 'Rental Notes', and 'New Table'.

8 Click Category and choose why type of asset this is.

The screenshot shows the 'Assets' form in a software application. The 'Category' dropdown menu is open, and an orange circle highlights the selection area. The form includes fields for Model Name or Number (containing 'Air 13'), Purchase Price (\$ 0.00), Serial No., Proof of Purchase URL, and Current Condition (a dropdown menu). The top navigation bar shows 'Solutions', 'Exchange', 'Inventory ...', 'Employee ...', 'UCS | Jobs', 'Certi-Dry', and 'UCS'. The left sidebar has 'Tickets', 'Notes', 'Assets', 'Equipment', 'Rental Notes', and 'New Table'.

Click "Purchase Price" and enter the price post tax that was paid for the asset.

ers

Tickets

Notes

Assets

Equipment

Rental Notes

New Table

## Add Asset

▸ Reports & Charts

### Information

|   |  |   |
|---|--|---|
| <div><div>Model Name or Number</div><div>Air 13</div></div> | <div><div>Brand</div><div>Apple</div></div>                  | <div><div>Category</div><div>iPad</div></div> |
| <div><div>Purchase Price</div><div>\$ 0.00</div></div>      | <div><div>Proof of Purchase URL</div><div></div></div>       |   |
| <div><div>Serial No.</div><div></div></div>                 | <div><div>Current Condition</div><div>Select one</div></div> |   |

10

Click "Serial No." and type in the asset serial number. If there is no serial number type in a defining number associated with this item. If you have to create one make sure to mark it on the asset with either a label or permanent marker. Please use good judgment on this. If it is a mouse and you are writing with permanent marker do not put it somewhere that it is visual or where people place their hands.

▶ Reports & Charts

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Information

|                      |                       |          |
|----------------------|-----------------------|----------|
| Model Name or Number | Brand                 | Category |
| x MV6Q3LL/A x        | x Apple x             | x iPad   |
| Purchase Price       | Proof of Purchase URL |          |
| \$ 979.99 x          |                       |          |
| Serial No.           | Current Condition     |          |
|                      | Select one            |          |

Location

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ion

|                        |
|------------------------|
| Useful Life Expectancy |
| Select one             |

11 Click here to select what condition the item is in.

Brand: Apple

Category: iPad

Proof of Purchase URL:

Current Condition:

- Fair
- Good
- Needs Repair
- Non-Functioning
- Poor

Image:

Notes:

Useful Life Expectancy:

Projected Residual Value:

12 Enter the link where the proof of purchase is or upload a copy of the receipt.

Category: iPad

Proof of Purchase URL:

Current Condition:

Image:

Uploading a receipt is preferred

Projected Residual Value: \$ 0.00

### 13 Choose the company this is being assigned to

|                            |                      |                       |               |
|----------------------------|----------------------|-----------------------|---------------|
| Product Name               | Model Name or Number | Brand                 | Category      |
| iPad Air 13                | Air 13               | Apple                 | iPad          |
| Purchase URL               | Purchase Price       | Proof of Purchase URL |               |
|                            | \$ 979.99            |                       |               |
| Asset ID                   | Serial No.           | Current Condition     |               |
| APE-Q0FW                   | FQ29M9Q0FW           | Select one            |               |
| Asset Current Location     |                      |                       |               |
| Start typing to search     |                      |                       |               |
| Certi-Dry                  |                      |                       |               |
| Dempsey Rd                 |                      |                       |               |
| UCS                        |                      |                       |               |
| Prism                      |                      |                       |               |
| United Drywall & Painting  |                      |                       |               |
| Yearly Depreciation Amount |                      |                       | Current Value |
| \$ 979.99                  |                      |                       |               |

### 14 Select the date it was purchased

|                        |    |                        |    |                               |    |                              |
|------------------------|----|------------------------|----|-------------------------------|----|------------------------------|
| Asset Current Location |    |                        |    |                               |    |                              |
| Certi-Dry              |    |                        |    |                               |    |                              |
| Depreciation           |    |                        |    |                               |    |                              |
| Purchase Date          |    | Useful Life Expectancy |    |                               |    |                              |
| --/--                  |    | Select one             |    |                               |    |                              |
| August 2024            |    |                        |    |                               |    |                              |
| S                      | M  | T                      | W  | T                             | F  | S                            |
| 28                     | 29 | 30                     | 31 | 1                             | 2  | 3                            |
| 4                      | 5  | 6                      | 7  | 8                             | 9  | 10                           |
| 11                     | 12 | 13                     | 14 | 15                            | 16 | 17                           |
| 18                     | 19 | 20                     | 21 | 22                            | 23 | 24                           |
| 25                     | 26 | 27                     | 28 | 29                            | 30 | 31                           |
| Asset Product Name     |    |                        |    | Personnel Database First Name |    | Personnel Database Last Name |



## 15 Select the expected life expectancy of the asset

The screenshot shows a web form with a dropdown menu titled "Useful Life Expectancy". The dropdown is open, displaying a list of values: 0, 2, 3, and 5. The value "5" is highlighted with a blue background and an orange circle. To the right of the dropdown, the text "Projected F" and "\$ 0.00" are visible. Below the dropdown, there is a table with the following headers: "Asset Product Name", "Personnel Database First Name", "Personnel Database Last Name", and "Personnel Database Email".

## 16 Click "Save"

The screenshot shows a web form with a "Save" button highlighted with an orange circle. The form includes a "Notes" section with a text area. Below the "Notes" section, there is a table with the following headers: "Asset Condition", "Asset one", and "Asset two". The "Save" button is located at the top right of the form, next to a "Cancel" button and a dropdown menu.