

10.6 Installations

Some companies need to associate a specific serial or registration number to a sold product. vtenext allows you to store this information in a special module that links customer and products. The Installations module allows you to track all the registration numbers that have been sold/hired to customers, while also monitoring the history of any assistance provided on the individual model. For example, today you sell a "Brand – Model X" boiler to a customer, and you file it away with serial number XYZ1234 that identifies the model and the location (room 1). Tomorrow the same customer buys another boiler from you, the "Brand – Model X" to be located in room 2. It will be stored among the installations related to the customer with the JKW8900 serial line.

When the customer reports a fault in the first boiler, the ticket will be connected not only to the customer and to the generic product Boiler "Brand – Model X", but also to the serial XYZ1234.

An installation must necessarily be linked to:

- A product, with which the article in the catalogue is identified;
- A unique serial/registration number;
- A customer (company);
- An identification name (you can make it match the serial number in order to simplify any search);
- A status to distinguish active machines from decommissioned ones.

The screenshot displays the 'Asset Test' form in the vtenext application. The form is organized into two main sections: 'INFORMATION' and 'NOTES'. The 'INFORMATION' section is further divided into two columns of fields. The left column includes 'Asset No' (AS52), 'Serial Number' (EPX123), 'Date Sold' (25-02-2022), 'Status' (In Service), 'Invoice Name', 'Shipping Tracking Number', 'Customer Name' (demoite), 'Modified Time' (25-02-2022 11:23:30), and 'Creator' (qnecklqelozjhwng@pptrvv.com (Capitan America)). The right column includes 'Product Name' (Product a), 'Assigned To' (qnecklqelozjhwng@pptrvv.com (Capitan America)), 'Date in Service' (25-02-2022), 'Tag Number', 'Shipping Method', 'Asset Name' (Test), 'Created Time' (25-02-2022 11:23:30), and 'Sales Order'. The 'NOTES' section at the bottom has a text area for notes. On the right side, there is a sidebar with 'SHORTCUTS' (Talks, Notes) and 'RELATIONS' (Trouble Tickets, Documents, Messages, Processes). The left sidebar shows the application's navigation menu with options like Home, Leads, Accounts, Contacts, Campaigns, Trouble Tickets, Potentials, Reports, and Modules (Clients, Marketing, Projects, Sales, Inventory, Collaboration, All, Accounts, Assets, Calendar).

From the company registry, it will be possible to view, for example, the fleet of machines sold to the customer.

Assets (1) - List

Showing 1 - 1 of 1

Add Asset

Action	Asset No	Asset Name	Customer Name	Product Name
<div><div></div><div></div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div><div></div><div></div></div>	ASS2	Test	demovite	Product a

The historical assistance on the product will be visible from the installation data.

Trouble Tickets (1) - List

Showing 1 - 1 of 1

Select Trouble Tickets

Add Ticket

Action	Ticket No	Subject	Related To	Status	Priority	Assigned To
<div><div></div><div></div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div><div></div><div></div></div>	TT12	Software issue	@	Wait For Response		

Revision #1
Created 23 August 2023 07:23:46 by Thomas
Updated 23 August 2023 10:45:34 by Thomas