



USER MANUAL · BUSINESS OWNER

Know what you own, who has it, and what it's worth.

The operator's guide to running your business assets with a single source of truth — from purchase order to disposal.

READ ME FIRST

This manual is for you

You run a business. You have laptops, monitors, phones, vehicles, tools, furniture — spread across offices, sites, and people. This manual shows you how to get all of it into AssetTrack, keep it accurate as staff and kit move around, and produce the reports your accountant, auditor and insurer will actually use.

What you'll be able to do by the end

- Bulk-import your existing asset list from a spreadsheet in one pass.
- Assign kit to employees or locations with a signed, timestamped handover.
- Print QR labels and run mobile audits that reconcile back to the register.
- Export a fixed-asset register with per-category depreciation, ready for finance.
- Discover devices already on your network and adopt them into the register automatically.

Tip — *AssetTrack works on any modern browser and installs as an app on your phone. You don't need to download software, and it keeps working if the wifi drops.*

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PART 1

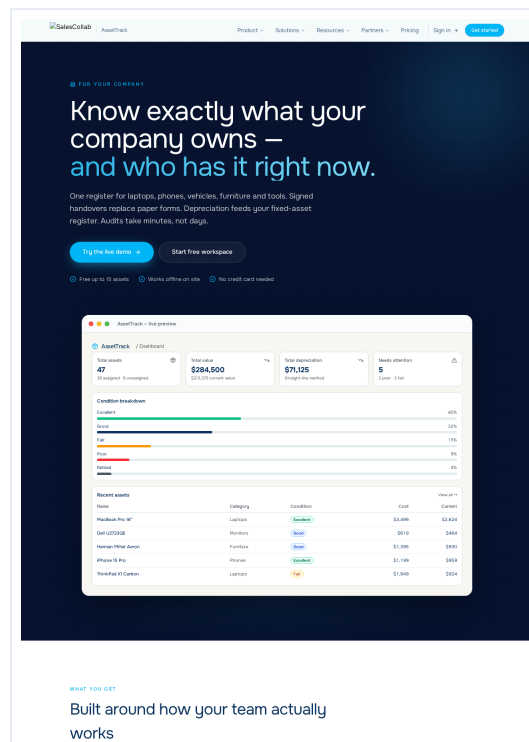
Quick start

Seven chapters to take you from empty workspace to a working register with signed handovers, labels, and a fixed-asset export.

CHAPTER 1

Setting up your workspace, team and roles

Before you import a single asset, spend ten minutes on the workspace and the people who'll use it. Doing this first saves rework later.



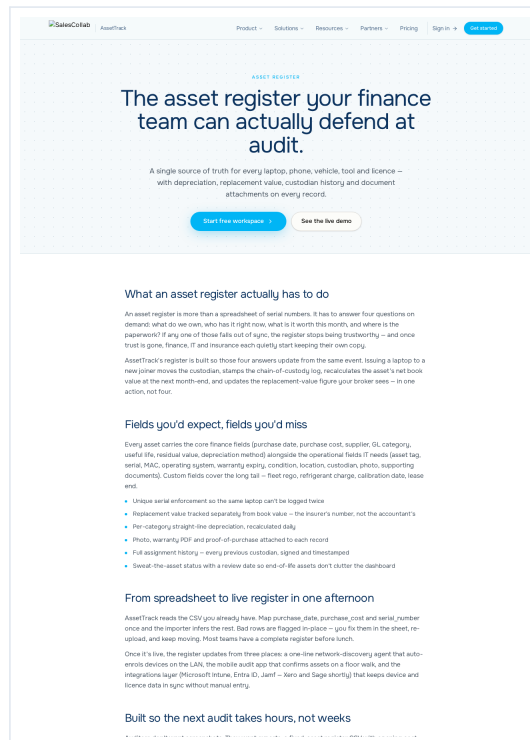
1. Sign up at salescollabassettrack.co.za and choose **For my business**.
2. Under **Settings → Branding**, upload your logo and set your company colour — every report you export inherits it.
3. In **Team**, invite your operations lead as **Admin**, finance as **Moderator**, and floor managers as **User**.
4. In **Settings → Locations**, add every office, site or branch. Employees and assets both live at a location.
5. In **Settings → Categories**, review the defaults — laptops, monitors, phones, vehicles — and add anything specific to your business.

Tip — The three-role model (Admin, Moderator, User) is deliberately simple. Admin runs settings, Moderator runs the register, User does audits and handovers.

CHAPTER 2

Bulk-importing your existing asset list

Most businesses already have a list somewhere — a spreadsheet, an old system, an export from RMM. AssetTrack imports all of them via CSV.



1. Under **Assets → Import**, download the template. Every column is labelled in plain English.
2. Paste your existing list into the template — one row per asset. Purchase date, cost and category are the fields that unlock depreciation.
3. Drop the CSV back in. AssetTrack validates every row and shows you exactly which fields need fixing before it commits.
4. Fix, re-upload, and commit. A few hundred assets import in under a minute.
5. Spot-check ten random rows against the source. If they match, you're done — this is your new source of truth.

Tip — Don't try to be perfect on import. Get the assets in, then improve them one at a time as you handle them.

CHAPTER 3

Employees, locations and assignments

An asset is more useful when you know where it is and who has it. The employee and location lists are what make that possible.

EQUIPMENT MAINTENANCE TRACKING

Stop chasing the paper equipment log.

AssetTrack replaces the maintenance log book and the shared spreadsheet with a searchable equipment log — preventive schedules, repair history, parts and cost per asset, and a QR label on every machine so a technician can log a service in 10 seconds.

[Try the free demo](#) [Free maintenance log template \(CSV\)](#)

Free when using a being financed, no credit card - no per-asset fee

PREVIEW

This is what your equipment log looks like in AssetTrack

Sample data from a small workshop fleet. Each row is one service event, with the next service due and a status pill that turns amber and red on its own.

ASSET	EQUIPMENT	LOCATION	DATE	TYPE	TECHNICIAN	HOURS	PARTS	COST	NEXT DUE	DS
EQ-0001	Atlas Copco compressor	Workshop A	2020-06-10	Preventive	J. Nankoo	1,240	Air filter	R 425	2020-09-10	🟢
EQ-0002	Taggit Forklift FL-04	Site	2020-06-11	Repair	M. Savi	3,105	Hydraulic hose	R 1,850	—	🔴
EQ-0003	Cummins generator 5-02	Site B	2020-06-12	Preventive	T. Khumalo	860	—	—	2020-12-12	🟢
EQ-0004	Robert Walter star 5-07	Site B	2020-05-08	Preventive	J. Nankoo	2,210	Engine oil, filter	R 960	2020-08-08	🟡
EQ-0005	WEG Water motor 40-01	Workshop A	2020-04-02	Repair	P. Dlamini	4,480	Bearings (x2)	R 3,120	2020-06-02	🔴
EQ-0006	Lincoln welder 50-03	Workshop A	2020-05-08	Preventive	M. Savi	610	—	—	2020-09-08	🟢
EQ-0007	Kaercher pressure washer	Site	2020-06-05	Preventive	T. Khumalo	295	Nozzle set	R 340	2020-09-05	🟢
EQ-0008	Hiltsi excavator 20-02	Site C	2020-05-14	Repair	P. Dlamini	5,720	Track turner	R 4,760	2020-08-14	🟡
FLEET TOTAL - LAST 60 DAYS								R 11,470	3 times attention	

Sample data — the free CSV template contains these exact 8 rows so you can copy them into the app and try it

What a real equipment maintenance log should do

The features that separate a working maintenance log from a binder nobody opens.

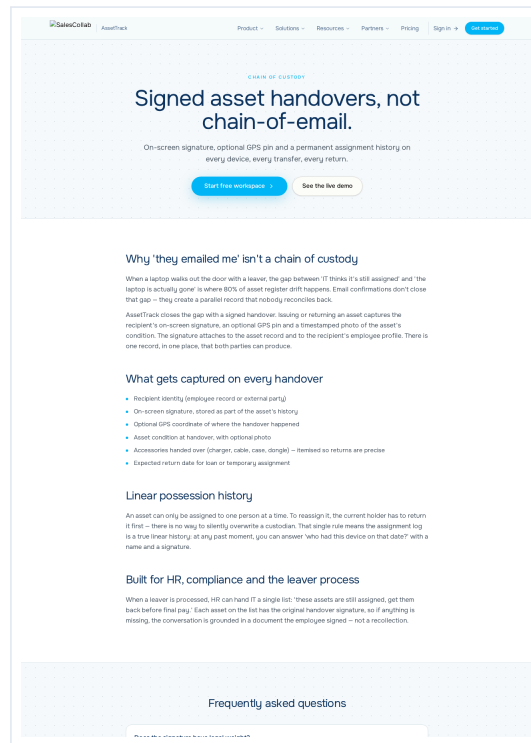
1. Under **Team → Employees**, add every person who could be issued kit. You can bulk-import employees from CSV too.
2. Give each employee a home location — usually the office or site they normally work from.
3. Open any asset and click **Assign**. Pick a person or a location. That's the assignment.
4. The dashboard now shows who has what. The employee page shows what each person is carrying.
5. When someone hands kit back or moves to another site, click **Unassign** or **Reassign** — the history is preserved.

Note — Assignments are linear — an asset is assigned to one person or one location at a time. To reassign, unassign first. This prevents the two-owners bug spreadsheets always have.

CHAPTER 4

Signed handovers and chain of custody

For anything expensive or portable, a signed handover protects everyone. AssetTrack captures the signature on-screen and pins it to the record.



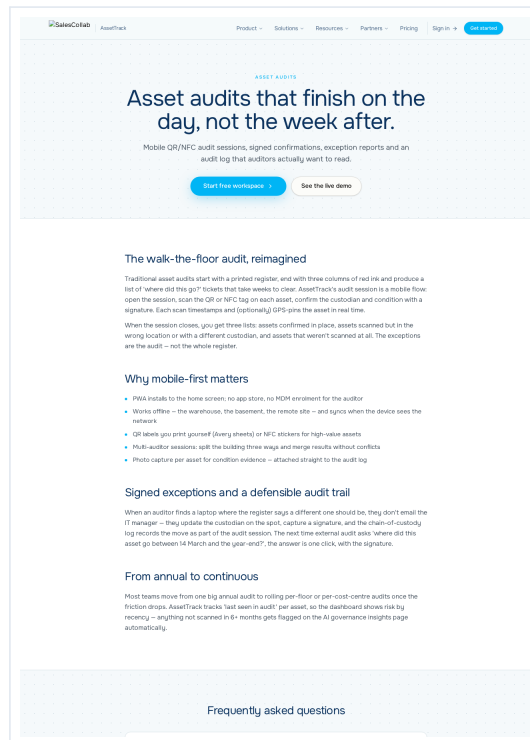
1. On the assign screen, tick **Require signature**.
2. Hand your phone or tablet to the person receiving the kit. They sign on-screen with a finger.
3. AssetTrack stores the signature, the timestamp, GPS pin (if enabled), and who witnessed it.
4. The asset page shows the full chain of custody — every person who's ever held it, with signature, on one timeline.
5. When the same person hands it back, they sign again on unassign. The loop closes.

Tip — *This is the single most useful feature when a laptop "walks". You know who signed for it last, and when.*

CHAPTER 5

QR labels and the first mobile audit

Printed QR labels turn any phone into an asset scanner. Together with a mobile audit, they collapse a two-day stock-take into an afternoon.



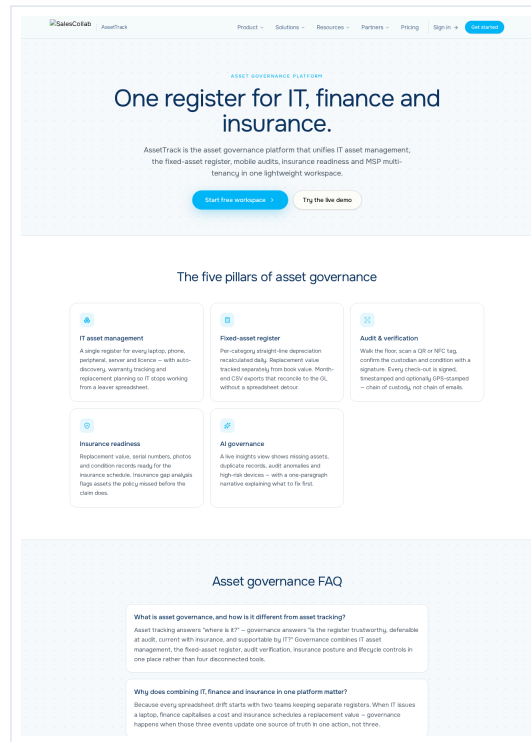
1. In **Assets**, filter to the range you want to label (say, all laptops) and click **Print QR labels**.
2. Print onto self-adhesive sticker paper — AssetTrack lays out the sheet for standard label sizes.
3. Stick a label on each asset. This is a one-time job.
4. Start an audit under **Audits → New session**. Choose a location.
5. Walk the site with your phone, scan each label, and confirm condition. Anything not scanned by the end shows as missing.

Tip — The audit doesn't need signal. Scan offline all day, sync when you're back on wifi. The reconciliation is done for you.

CHAPTER 6

The fixed-asset register your finance team wants

The report your accountant, auditor or insurer really wants is one line per asset with cost, depreciation, net book value, and replacement value. AssetTrack builds it every time you export.



1. Go to **Reports → Fixed-asset register**.
2. Pick the period (usually the financial year).
3. Choose **CSV** for the finance team, **PDF** for the auditor.
4. Every asset appears with its cost, accumulated depreciation, net book value, category and location — the exact schema finance uses.
5. Email it. You've just replaced the annual spreadsheet fire drill.

Tip — The same export supports GRAP-aligned depreciation for public-sector clients. Talk to us if you need SARS-style categories preloaded.

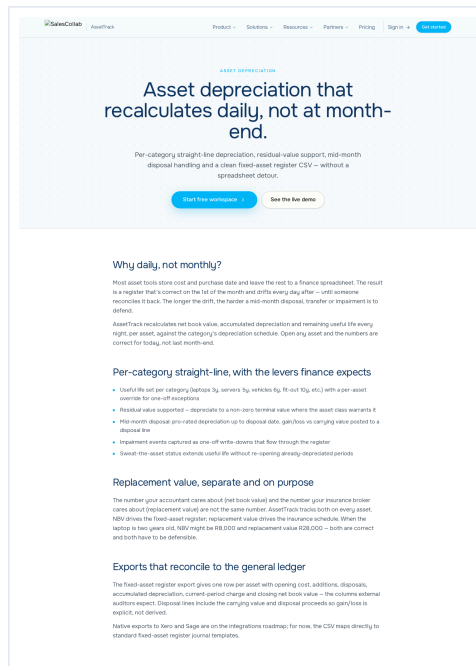
PART 2

Reference

The parts of AssetTrack you'll reach for once the basics are in place — depreciation, insurance, procurement, network discovery, governance and permissions.

CHAPTER 7

Depreciation done right, per category



AssetTrack recalculates straight-line depreciation every day, per category, based on the useful life you set. You never open a spreadsheet — the register is always current.

Set the default useful life for each category in **Settings → Categories**. Override at the individual asset level for anything unusual (a leased laptop with a defined return date, for example).

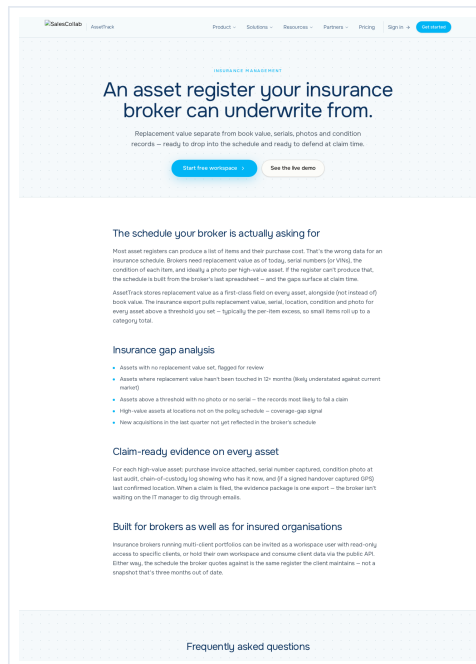
The dashboard totals two numbers: total value and current book value. The gap is accumulated depreciation.

- Straight-line, recalculated daily — no month-end wait.
- Per-category useful life; per-asset override where needed.
- Residual value supported for anything with a known disposal price.
- Extended / sweat status hides fully-depreciated kit that's still in use, without inflating replacement alerts.

Tip — If finance wants a specific policy — SARS wear-and-tear, GRAP, a leasing schedule — model it once in categories and it applies to every new asset.

CHAPTER 8

Replacement value and insurance



Replacement value is separate from book value on every asset. Insurance is paid against replacement, not book, so the two live side-by-side and don't fight each other.

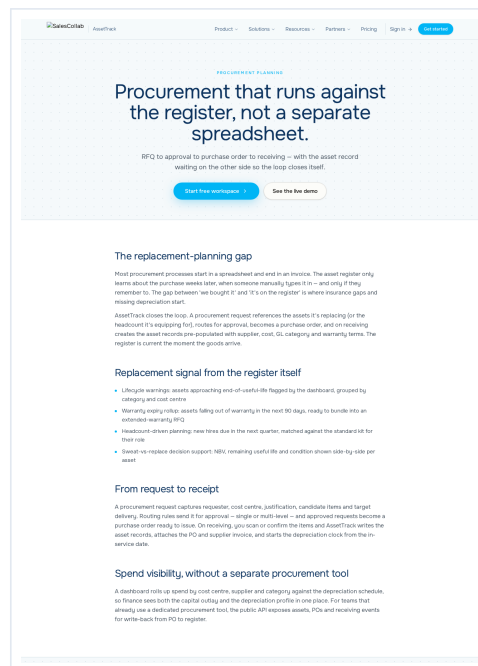
Once a year, or when prices move, run the **Replacement value refresh** report. It flags assets whose replacement values haven't been touched in over 12 months so you can review them in bulk.

Export the insurance schedule to hand to your broker. Renewals stop being a scramble.

Insurer-ready — After a claim, the exported schedule is the evidence. Save every year's export in a shared drive so you can always show what was covered when.

CHAPTER 9

Procurement — from RFQ to receiving



New assets usually start life as a request. AssetTrack has a lightweight procurement flow so the request, the quotes, the approval and the eventual receipt all attach to the resulting asset — no manual joining.

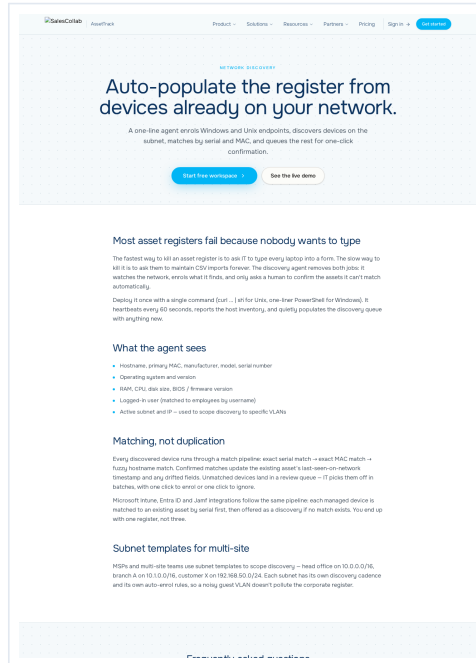
Raise a request under **Procurement → New request**. Attach quotes as PDFs. Route for approval. Once approved and delivered, the receiving step creates the asset in the register with cost, date and supplier already filled in.

You get a full paper trail: request → PO → asset, with no re-keying.

Note — Turn this on late if the team pushes back — the register works fine without it. Add it once handovers and audits are second nature.

CHAPTER 10

Network discovery — populate the register automatically



Instead of chasing every laptop by hand, run the AssetTrack discovery agent on a machine on the network. It enumerates devices, matches them to existing assets by serial and MAC, and queues the rest for a one-click confirmation into the register.

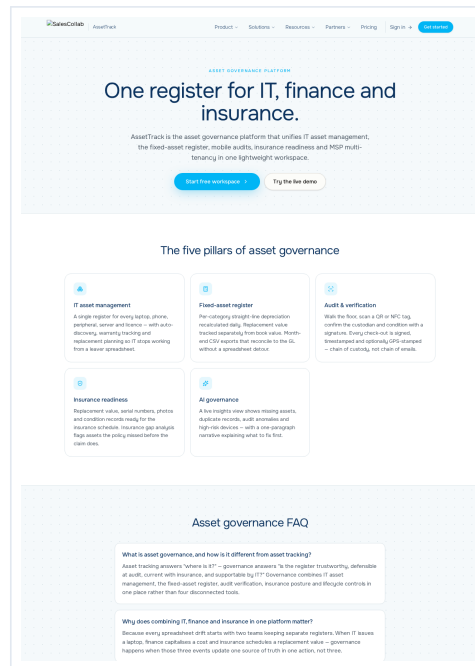
One-line install on Windows (PowerShell) or Unix (curl). No open ports, no cloud credentials on the endpoints.

The result: onboarding a new site takes an afternoon instead of a week.

Tip — Discovery runs happen on a schedule. New devices appear in **Discovery** → **Review** — approve them into the register with one click.

CHAPTER 11

Governance, insights and reports



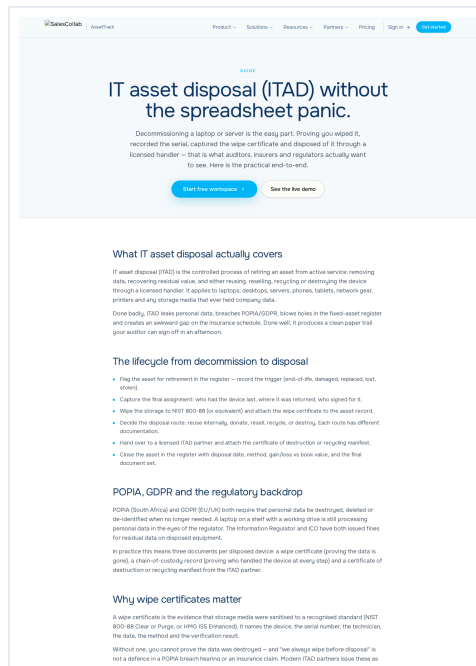
The Insights view is the exec dashboard: replacement due, warranty ending, condition drift, unassigned kit, assets past useful life. It's what you look at once a week to know where to spend attention.

Every insight can be exported. Every insight has a drill-down to the underlying assets — no black-box scores.

Tip — Use the weekly insights email as your Monday-morning brief. It replaces the spreadsheet nobody was updating.

CHAPTER 12

Roles, permissions and audit logs



Three built-in roles cover almost every business: **Admin** runs settings and billing; **Moderator** manages the register and approves handovers; **User** does audits, assignments and receiving.

Every change is logged. Under **Activity**, you can see who changed what and when — including edits to value, condition, location, and assignment.

Note — For sensitive kit — safes, keys, vehicles — restrict edit rights to Admin and Moderator. Everyone else stays User.

PART 3

Answers

The operator questions we hear most often, plus a plain-English glossary of the terms.

FREQUENTLY ASKED

Frequently asked

How do I migrate from a spreadsheet?

Export the spreadsheet to CSV, drop it into the import template, validate, commit. Most migrations of a few hundred assets take under an hour. Assignment history can be brought across as historical notes.

How do handovers work when someone leaves?

Open the employee page. Every asset they're holding is one click away. **Bulk unassign** hands them all back to the pool at once, with signatures if required.

Does the depreciation match SARS / GRAP?

Yes. Straight-line, per category, with residual value and useful life overridable per asset. GRAP-aligned schedules are supported for public sector clients.

What happens when finance closes the year?

Nothing needs to happen in AssetTrack — the register is always current. Export the fixed-asset register on year-end date and hand it over. Book value, accumulated depreciation and additions/disposals are already computed.

Can auditors get read-only access?

Yes — invite them as User and tick **Read only**. They see the full register, activity log and exports, and can't change anything.

How does the mobile audit reconcile back?

Every scan is timestamped and pinned to a location. At the end, the session shows: confirmed on site, missing, found in the wrong place, and any newly-discovered assets.

What about assets we're still using past their useful life?

Set the asset status to **Extend / sweat** with a review date. The register keeps depreciating to residual, but the item is hidden from replacement alerts until you review it.

Can I integrate with our existing tools?

Yes — the public REST API returns any asset by ID with an org-scoped API key. Common integrations include RMM, MDM, ITSM ticket tools, and accounting exports.

GLOSSARY

The words we use

Asset. Anything in the register: laptop, vehicle, tool, piece of furniture.

Category. The type of asset — laptops, monitors, vehicles. Depreciation policy is set per category.

Location. A physical place — office, site, warehouse. Assets and employees both live at a location.

Assignment. The current holder of an asset — an employee or a location. Always one at a time.

Chain of custody. The full history of who has held an asset, with signatures and timestamps.

Book value. Cost minus accumulated depreciation. What finance carries the asset at.

Replacement value. What it would cost to replace today. Used for insurance.

Fixed-asset register. The formal list of all assets with cost, depreciation and book value — what finance and auditors ask for.

Discovery agent. The small program you run on a network to auto-populate the register.

Role. What a team member can do — Admin, Moderator or User.

NEXT STEPS

You're ready.

Import your existing list this week. Run the first audit next month. By quarter-end you'll have the register you always wished you had, and you'll never chase a laptop by email again.

Need help? support@salescollabassettrack.co.za

Live product tour salescollabassettrack.co.za/demo

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