

SalesCollab

AssetTrack

USER MANUAL · MSP · IT SUPPORT EDITION

**Every device.
Every client.
Every service call.**

The IT support team's field guide to running AssetTrack across every managed customer — persistent CMDB, immutable swap history, per-customer maintenance schedules with auto reminders, and one audit trail across the whole book.

READ ME FIRST

This manual is for your IT support team

You run — or work on — the IT support desk inside a Managed Service Provider. Your engineers cover a book of customers, each with their own kit, sites, contracts and expectations. This manual shows the support team how to run AssetTrack day-to-day: persistent configuration items per customer, immutable swap history when a device is stolen or fails, per-customer maintenance schedules with automatic reminders, and one audit trail that answers 'who changed what' across every tenant.

What you'll be able to do by the end

1. Provision an isolated tenant per customer, invited engineers per-tenant, and see a live 'Managed tenants: N / 10' chip so billing is never a surprise.
2. Stand up the persistent CMDB per customer — every switch, firewall, UPS and access point lives as a slot that survives asset failure, theft or upgrade.
3. Swap a failed or stolen asset in seconds while the slot keeps its name, history, maintenance schedule and warranty chain.
4. Build maintenance templates once (quarterly firewall review, annual UPS load test) and schedule them per customer with auto-email reminders to both the customer contact and the assigned technician.
5. Read one audit log that answers 'who changed what, when' across CMDB, swaps and maintenance — filterable, searchable, CSV-exportable.

Tip — AssetTrack runs in any modern browser and installs as an app on your phone. Field technicians don't need to download anything, and it keeps working when the customer's wifi drops.

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PART 1

Daily support workflow

Seven chapters covering the day-to-day: how a support engineer opens the right customer, replaces a failed asset without losing history, and books the next maintenance visit before the customer has to ask.

CHAPTER 1

Signing in and switching between customer tenants

Your MSP account is the parent. Every customer lives in an isolated tenant. Switching between them should feel like switching browser profiles — one click, no data crossover.

1. Sign in at **salescollabassettrack.co.za** with your engineer email. Use SSO if your MSP has it enabled.
2. The top nav shows the **tenant switcher**. Every customer you have access to appears here — click to enter that tenant.
3. Inside a tenant, the sidebar sections are grouped: **Overview, Inventory, Operations, Network, People, Insights, Account**. The persistent Discovery sub-nav sits under Network.
4. New engineer? Ask your owner to grant tenant access under **Team** → **Members**. Access is per-tenant — a junior tech can be granted three customers and no more.
5. The chip at the top of every MSP screen reads **Managed tenants: N / 10**. It turns amber the moment you cross the base plan's included cap.

MSP tip — If you can't see a customer in the switcher, it's an access issue, not a bug. Only the MSP owner or admin can grant tenant access.

CHAPTER 2

The customer CMDB: slots, not assets

The Configuration Management Database (CMDB) is the persistent view of what a customer *should* have running. A CI (Configuration Item) is a slot — 'Main Firewall — Cape Town HQ' — that lives forever. The physical asset filling that slot can change; the slot doesn't.

1. Inside the customer tenant, open **MSP** → **CMDB**. You'll see a table of CIs grouped by site and role.
2. Click **+ Add config item** to create a slot. Give it a clear operator name ('Access switch — Floor 2 (SW-CPT-F2-01)'), a role, a site, and the currently installed asset.
3. The **Current asset** column shows the physical device fulfilling the slot right now. The **Since** column shows how long that particular asset has been in the slot.
4. Every CI carries its own maintenance schedule, warranty status and history — none of that is stored on the physical asset, so it survives replacements.
5. Use the search box for cross-CI queries ('all firewalls', 'all UPS units past warranty', 'Cape Town site core switches'). The CMDB is the fastest path to a portfolio-wide view of a customer's stack.

MSP tip — Name CIs the way your technicians speak. 'Access switch — Floor 2' beats 'SW-27' every time.

CHAPTER 3

Swapping a failed, stolen or upgraded asset

When a device fails, is stolen or is upgraded, don't create a new CI. Swap the asset inside the existing slot. The CMDB slot keeps its identity; the departing asset gets a retirement reason on the way out.

1. Open the affected CI in **MSP** → **CMDB** and click **Swap asset**.
2. Search for the incoming asset. If it's brand-new, add it via **Inventory** → **Assets** → **New** first — then return to the swap dialog.
3. Choose the **retirement reason** for the outgoing asset: *Fault, Theft, Damage, Upgrade, Warranty return, or End of life*. Add a short note — this becomes part of the audit trail.
4. Confirm the swap. The old asset is retired with the reason attached, any employee assignment on it is closed, and the new asset is bound into the slot at that moment.
5. The CI's maintenance schedule, warranty timer, contract linkage and history all stay attached to the slot — the customer never loses a day of coverage.

MSP tip — The 'Replaces asset' link on the incoming asset makes replacement chains queryable. When finance asks 'how many devices in this slot in the last three years?' the answer is one click.

CHAPTER 4

Reading the immutable swap history

Every swap writes an immutable row: which asset came in, which went out, the reason, the engineer who performed the swap, and the timestamp. Rows are locked at the database level — nobody, not even an MSP owner, can rewrite history after the fact.

1. Open any CI and scroll to **History**. Rows are newest-first, showing engineer, in / out asset, retirement reason and note.
2. The lock icon on every row is not decorative — the database trigger blocks updates and deletes. If you see 'row is immutable' in the UI it means the platform is doing its job.
3. Need to correct a mistake? Do **not** attempt to edit the row. Perform a new swap that restores the correct state; the corrective swap is a first-class part of the record.
4. Export the history to CSV from the CI page — useful for insurance claims (theft), warranty escalations (repeat faults) or year-end asset audits.
5. Every history row also lands in the org-wide **Audit log** — see Chapter 10 for the portfolio view.

MSP tip — For a theft claim, insurers accept the immutable history CSV as proof of last known custody. It's often the difference between a paid claim and a queried one.

CHAPTER 5

Building maintenance templates once

A template is a re-usable maintenance definition — *'Quarterly firewall review', 'Annual UPS load test', 'Six-monthly access point RF sweep'*. Build them once at the MSP level; apply them to every customer that needs them.

1. Open **MSP** → **Maintenance** → **Templates**. Click **+ New template**.
2. Fill in the name, the default interval (weekly, monthly, quarterly, annual), the estimated on-site time, and the checklist of tasks the engineer will complete.
3. Attach a required **evidence** block if the customer contract demands it — photos of the rack, config export, screenshot of a test result.
4. Save. The template is now available in the schedule builder for every customer tenant you manage.
5. Templates are versioned — updating a template does not disturb schedules already generated, but the next scheduled visit will pick up the new checklist.

MSP tip — *Keep the template count small. Five templates covering 90% of visits beats twenty-five templates nobody remembers.*

CHAPTER 6

Scheduling maintenance per customer

A schedule ties a template to a customer, an assigned technician, a start date and a cadence. Each customer sees only their own schedules; you see all of them on the MSP maintenance board.

1. Inside the customer tenant, open **MSP** → **Maintenance**. Click **+ New schedule**.
2. Pick the template, the site (optional), the assigned technician, and the first due date. The cadence comes from the template but you can override it.
3. Save. The schedule now shows on the maintenance board grouped as **Overdue**, **Due this week**, or **Upcoming**.
4. The customer contact receives a reminder email **7 days before due**. The assigned technician receives one **2 days before due**. Both include next-due date, site, template checklist and a one-click 'confirm booked' link.
5. Overdue schedules auto-escalate: a second email fires the day after due, and the schedule turns red on the portfolio console. If it stays overdue three days, the MSP owner is copied.

MSP tip — Assign a schedule to a technician, not a generic 'MSP tech' pool. Reminders that name a person are actioned three times more often than ones addressed to a queue.

CHAPTER 7

Reminders, overdue alerts and closing a visit

Reminders are automated. Closing a visit is manual — and that's the point. The support engineer confirms what was done, uploads evidence, and marks the schedule complete. The next-due date auto-generates from the cadence.

1. When the visit is booked, click **Mark as booked** on the schedule. This suppresses further reminders until the visit is complete or missed.
2. On-site, open the schedule on your phone. Tick through the checklist as you complete each item. Attach photos or config files where the template requires evidence.
3. Get the customer signature at the end (Signature pad → tap → done). This creates a signed job card PDF that emails to the customer contact automatically.
4. Click **Complete visit**. The schedule records completion time, engineer, evidence and signature; the next occurrence is generated from the template cadence.
5. If the visit slips, mark it **Rescheduled** with a new date rather than letting it go overdue silently. The audit log tracks reschedules so patterns become visible.

MSP tip — Signed job cards are the single most useful artefact for a QBR. Save them centrally per customer — the customer will ask for them at renewal.

PART 2

Portfolio operations

The MSP-wide view. Portfolio console, cross-tenant search, discovery agents, the topology diagram, the audit log across every customer, and how tenant billing actually works.

CHAPTER 8

The portfolio console and cross-tenant search

The portfolio console is the NOC view. Every customer scored on open jobs, overdue maintenance, expiring warranties and audit freshness. Cross-tenant search jumps directly to any asset, employee or job card in your book.

1. Open **MSP** → **Portfolio**. Customers are ranked worst-first: highest number of overdue schedules, oldest audit freshness, most open jobs.
2. Click any customer row to jump straight into their tenant. Click a metric to jump into the filtered list (overdue schedules for that customer only, etc.).
3. Use the search bar at the top of the portfolio console to query across every tenant at once — serial number, MAC address, employee name, job card number.
4. The **Audit freshness** score shows time since the last discovery run. Green < 30 days, amber 30–60, red > 60. Anything red is a candidate for a discovery re-scan.
5. Save searches as tiles on the portfolio ('All firewalls past warranty', 'Job cards open > 14 days') — they become part of the morning stand-up.

MSP tip — Three tiles at the top of the portfolio, refreshed every morning, saves more customer relationships than any monthly report.

CHAPTER 9

Discovery agents and the topology diagram

Discovery removes the manual step of typing asset registers. One-line agent install per site, weekly or daily scans, and a network topology diagram assembled from LLDP / CDP neighbour data.

1. Inside the customer tenant, open **Discovery** → **Agents** → **Add agent**. Copy the one-liner (PowerShell for Windows, curl-piped shell for Unix / macOS).
2. Run it on any machine on the customer's network. The agent registers, does a preflight (network reach, permissions) and appears in the agents list within a minute. Outbound HTTPS only — no firewall changes.
3. Under **Discovery** → **Subnets** select the subnet, then run the three prerequisite scans (**SNMP / controller_api**, **ICMP / ARP**, **LLDP / CDP**) with the one-click buttons on the topology page.
4. Open **Discovery** → **Topology** → **Diagram**. Wait for the auto-layout to settle — core, distribution, access, endpoints — then click **Export** for PNG, SVG or PDF.
5. Under **Discovery** → **Review**, confirm auto-matched devices, adopt unmatched ones into the register, and ignore the noise (guest devices, IoT). Confirmed devices update the CMDB slot's *last seen on network* timestamp.

MSP tip — If the topology diagram is empty, check the diagnostics panel on the topology page. It lists edge count, node count and raw protocol values — usually one prerequisite scan hasn't landed yet.

CHAPTER 10

The audit log across every customer

Every CMDB change, asset swap, maintenance schedule edit and maintenance completion writes a row to the audit log — with actor, timestamp and the before/after change. It's the single answer to 'who changed what, when'.

1. Open **MSP** → **Audit log**. Rows are newest-first with actor email, table (CI, swap, schedule, template, record), action and a short entity label.
2. Filter by table to focus a review: *ci_asset_history* shows every swap; *maintenance_schedules* shows every reschedule or reassignment; *maintenance_records* shows every completed visit.
3. Search by entity label (site name, CI name) or by actor email when a change needs attributing.
4. Click any row to expand the change diff. All rows are immutable — the audit log itself cannot be edited.
5. Export to CSV for compliance reviews. The export includes the raw JSON diff so downstream tools (SIEM, GRC) can index the changes.

MSP tip — *Run a five-minute audit-log skim every Monday morning. Unexpected swaps, out-of-hours schedule changes and unusual actor emails all surface faster than any alert can catch them.*

CHAPTER 11

Tenant billing: 10 included, R299 each after

The MSP base plan is R2,999 / month and includes 10 managed customer tenants. Every additional tenant costs R299 / month (a tenth of the base). Usage is visible everywhere in the app — you'll never be surprised by an overage.

1. The **Managed tenants: N / 10** chip appears in every MSP screen header. Green while you're under the cap; amber the moment you cross it.
2. Overage math (worked example): 15 tenants = R2,999 base + 5 × R299 = **R4,494 / month**.
3. Under **MSP** → **Audit log** the trigger writes a *billable_overage* row every time you add a tenant beyond the 10th — so month-end invoicing is fully evidenced.
4. Storage overages bill separately at R2 / GB / month above the plan's included storage. The **Account** → **Storage** panel shows current usage and the trend.
5. Need > 25 tenants or white-label console? Move to **MSP Scale** (custom). Same features, unlimited tenants, dedicated success contact and a response-time SLA.

MSP tip — Watch the tenant chip in trial extensions. Adding a prospective customer counts against the cap the moment the tenant exists — archive it if the deal doesn't land.

CHAPTER 12

Handing a customer back cleanly

If an engagement ends, the customer's tenant leaves with them — full asset register, full CMDB, full audit history. No lock-in, no export fee, no drama. Handing over cleanly is a growth lever, not a loss.

1. Confirm the handover date with the customer contact. Book a final discovery scan and a final maintenance visit so the register is current.
2. Under **Settings** → **Ownership** in the customer tenant, transfer ownership to the customer's nominated administrator email. They receive an activation link.
3. Revoke all your engineers' access to the tenant via **Team** → **Members**. The tenant then disappears from your portfolio console (and stops counting against your tenant cap).
4. The customer keeps everything: CMDB slots, immutable history, maintenance schedules, audit log, discovery agents. They can continue on their own AssetTrack plan or export and leave.
5. Note: the tenant's audit log preserves your engineers' historical actions with their email. That's intentional — historical accountability outlives the engagement.

MSP tip — *Handing over cleanly is a marketing asset. Say so on the pitch deck: no lock-in, no export fee, portable audit trail. Every prospect notices.*

PART 3

Answers

The questions our support desks ask on almost every onboarding, and a glossary of the terms your team will use with each other and with customers.

FREQUENTLY ASKED

Frequently asked

Can one customer ever see another customer's data?

No. Tenants are isolated at the database level with row-level security. An engineer with access to two tenants sees each one independently; a customer viewer never sees another customer at all.

What happens to maintenance history when I swap an asset?

It stays on the CI (the slot), not the asset. The new asset inherits the schedule and the customer never loses a coverage day. The retired asset keeps its own service history for finance / warranty purposes.

Can I edit a swap history row after the fact?

No. Rows are immutable at the database level. To correct a mistake, perform a corrective swap — that corrective action is itself part of the record.

Do maintenance reminders go to the customer or to us?

Both. Customer contact 7 days before, assigned technician 2 days before, escalation to the MSP owner if a schedule stays overdue 3 days.

How does the MSP plan billing work?

R2,999 / month base includes 10 managed tenants. Each tenant beyond 10 is R299 / month. Storage overage at R2 / GB / month above included storage. Move to MSP Scale (custom) for > 25 tenants or unlimited.

Can I run this on a customer air-gapped network?

The discovery agent needs outbound HTTPS to reach AssetTrack. On air-gapped networks, use manual CSV import or the public API. The CMDB, maintenance and audit features all work fully without discovery.

Can I trial a customer tenant without signing them up?

Yes. Create the tenant, run discovery, generate the register. If the deal doesn't close, archive the tenant — it stops counting against your cap immediately.

GLOSSARY

The words we use

MSP workspace. The parent account. Holds engineers, branding, portfolio console and every customer tenant.

Customer tenant. An isolated workspace for one managed customer. One tenant per customer, always.

Configuration Item (CI). A persistent slot in a customer's stack — 'Main firewall — Cape Town HQ'. The physical asset filling it can change; the slot doesn't.

Swap. The action of replacing the physical asset inside a CI. Records a retirement reason on the outgoing asset and writes an immutable history row.

Retirement reason. Why the outgoing asset left the slot: Fault, Theft, Damage, Upgrade, Warranty return, End of life.

Immutable history. The append-only record on a CI, locked at the database level. Cannot be edited or deleted after the fact.

Maintenance template. A re-usable maintenance definition (name, cadence, checklist, evidence requirements) built once at the MSP level and applied per customer.

Maintenance schedule. A template applied to a customer, with an assigned technician and a next-due date. Reminders fire automatically.

Maintenance record. The row created when a scheduled visit is completed. Holds engineer, evidence, signature and completion time.

Portfolio console. The MSP-wide dashboard. Scores every customer on overdue jobs, expiring warranties, audit freshness and open schedules.

Audit log. The tamper-evident record of every CMDB change, swap, schedule edit and completion, filterable per tenant or across the book.

Managed tenants chip. The N / 10 counter shown in every MSP screen header. Green under cap, amber over.

Handover. The process of returning a customer tenant to the customer at the end of an engagement — full data, no lock-in.

NEXT STEPS

You're ready.

Stand up the CMDB for one customer this week. Build three maintenance templates next. By month-end you'll have automated reminders firing, an immutable history the customer can see, and an audit log that answers every 'who changed what' before the customer has to ask.

Need help? support@salescollabassettrack.co.za · Live product tour:
salescollabassettrack.co.za/demo