



Identifying an Asset

Print this document to follow along and take notes on the video.

1. Identifying an Asset is the first step in tracing the safety history of a product, equipment or location.
2. To start click on Identify
3. You will start on single identify. To identify up to 250 assets at once click on the Multi-Add tab.
4. The first step is to select the asset type you would like to identify using the asset type drop down.
5. Next enter the identifiers for the asset. A serial number must be entered. If the assets does not have a serial number click the generate link.
6. The Owner will set the customer, job site or location that owns this asset.
7. If this asset has order information associated with it you can enter the PO and Order Number
8. Next we have the Date Identified which can also be used as the manufactured date.
9. The asset details will allow you to enter all custom attributes for the assets. This typically includes information such as type, model # and size. These attributes can be changed in the Setup area of Field ID.
10. The attachments section will allow you to upload documents or images to accompany this asset.

Notes:



11. Click Save to create the asset in your account.
12. You can now look up this asset using the Smart Search box at the top and see the Home page for the asset you just entered.