Equipment Inventory Module

Introduction

The purpose of the Equipment Inventory module is to allow a fleet of machines/equipment/other to be surveyed for each individual Third Party, typically a Customer. Main feature of the module is to allow complete flexibility in defining the columns that will make up the inventory, specifying the name and type of data (text/date/number etc.) thus allowing the module to be adapted to the management of different types of equipment/products.

Once you have defined the fields you wish to have in your inventory, it is possible to "lock in" any changes by simply setting a constant, thus preventing accidental changes to the settings, changes that can still be reactivated by deactivating the constant.

Settings

The first operation is to define the columns you wish to have to census an individual piece of equipment; in the proposed example we will examine an inventory of computer equipment. In the form setup, a tab appears called DB Setup (DB Setup). Using the + button in the upper right corner it will be possible to define a new field to be added to the existing ones. When first installed, of course, the list of columns will be empty.

Through the symbols on the line it will be possible:
- Edit the field, via the pencil symbol
- Delete the field using the trash symbol
- Reorder the columns by the matrix symbol, going over, clicking and dragging the row to the new position.

NOTE: Deleting a field will not only delete the definition of that field, but will cause the deletion of all data, related to that field, already entered in the various third parties. This is an irreversible operation. In fact, if there is data already entered in one or more third parties, the warning message in red appears above the table.

> Equipments Inventory Setup   Back to Module list
>
> ● **DB Setup**   Settings   Complementary attributes   About
>
> Database fields list   ➕
>
> **WARNING** The equipments inventory contains data, deleting a column will permanently loose the data entered in this column
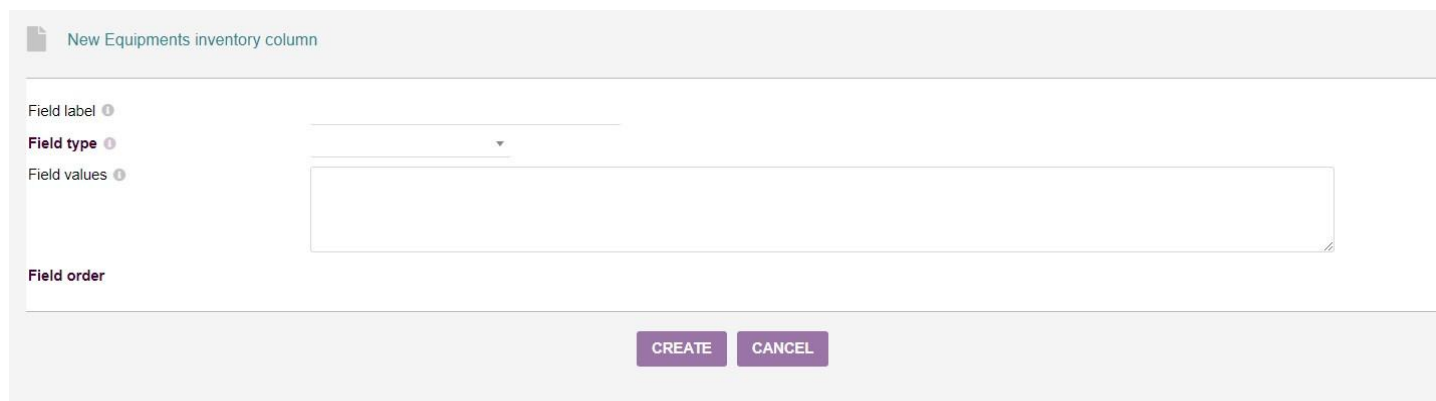
Field order	Field label ⓘ	Field type ⓘ	Field values ⓘ			
1	Product type	select	Desktop;Laptop;Monitor;Inkjet;Laser;Multifunction	✏	🗑	⁙
2	Model code	text		✏	🗑	⁙
3	Serial number	text		✏	🗑	⁙
4	Service contract	select	Yes;No	✏	🗑	⁙
5	Service contract end	date		✏	🗑	⁙
6	Service contract price	double		✏	🗑	⁙
7	Location map	text		✏	🗑	⁙

When adding a new field the following screen will appear:

For each field it will be necessary to indicate:

1. The column label that will appear in columns and printouts
2. Column type, which may be:
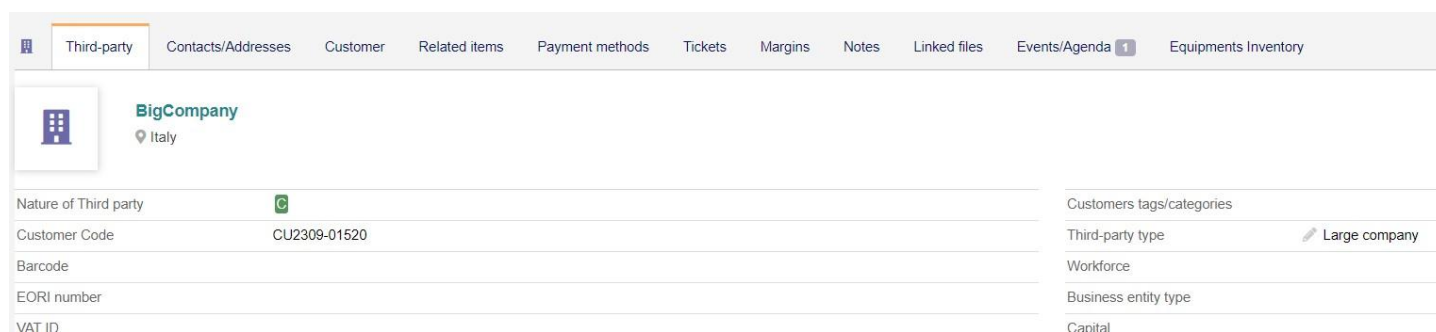   a. Text
    b. Selection box
    c. Whole number
    d. Number with decimal places
    e. Date
3. Column values, this item applies only to column type selection box, you will need to indicate the values that will appear in the drop-down selection box, listing them one after the other separated by ; without spaces. So a list **Yes;No** is fine while **Yes ; No** is incorrect
4. Column sorting is not fillable and is only indicative of the odine assigned to the column when confirming settings
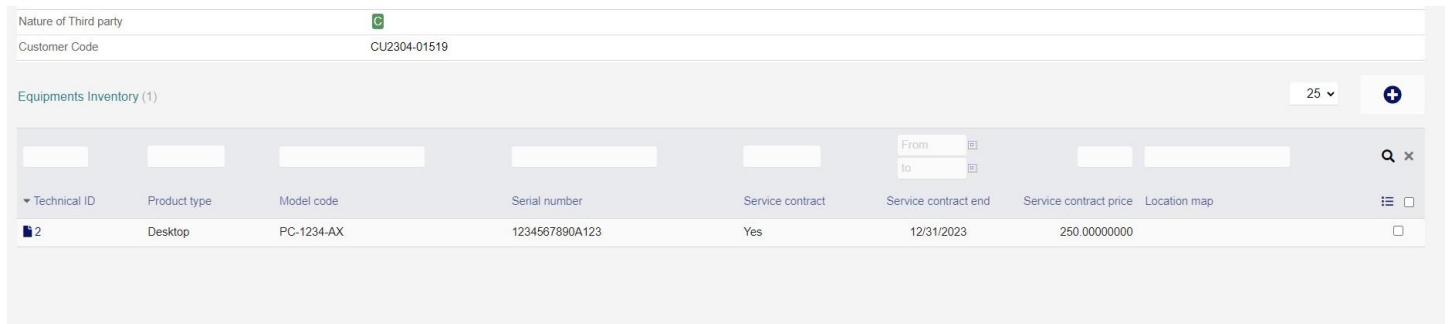
Having defined all the columns you want the configuration operation is finished, to avoid inadvertently changing the settings and to prevent changes to others you can set in the **Home->Settings->Other Settings** menu a constant named **MLAB_EQINVENT_NOADMIN** with value **1**. To allow changes to the settings, it will be enough later to set this constant to the value **0**.

Third Party Equipment Inventory Management

Once the module configuration is done in the screen related to a third party a new tab will appear named **Equipment inventory (Equipment inventory)**
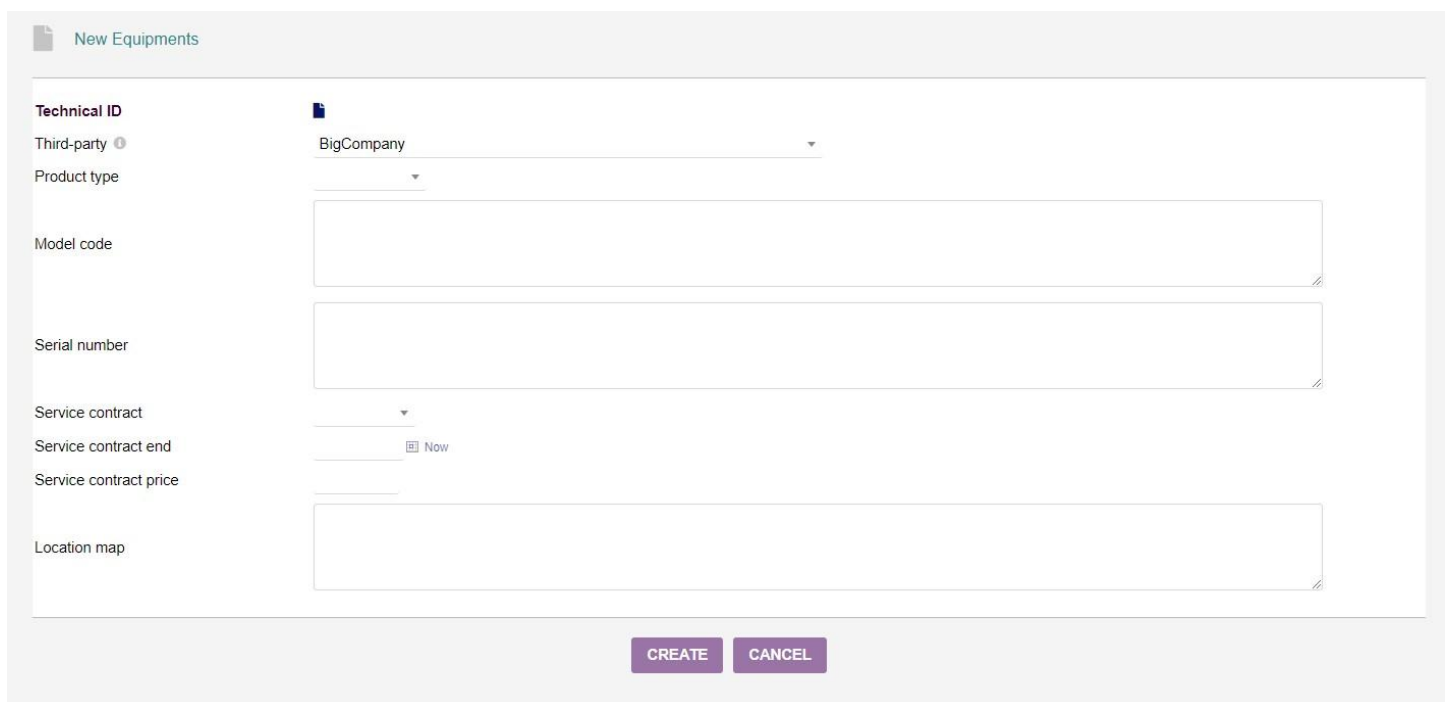
Selecting that tab will bring up a list of surveyed equipment, with search and sorting capabilities, as in all similar Dolibarr screens

Again via the usual + button it will be possible to insert a new line

Additional printouts

This module also adds 3 printouts to the third party tab that can be activated in the settings of Dolibarr's Third Party module. The three printouts are:

1. Third Party Master and Contacts Create a PDF with the third party's basic master data with a list of all the third party's contacts.
2. Equipment inventory Create a PDF listing all equipment surveyed for the third party
3. Activities Creates a PDF listing all activities performed on the third party **NOTE: This report only makes sense if you have installed the Advanced CRM module developed by others. Otherwise it will result in a document with an empty table.**