



Asset Tagging with Site Assets from BranchServ

Identify and log your branch equipment with BranchServ's Site Assets Program for enhanced efficiencies and better budgeting.

What Is Site Assets?

Site Assets is a tool that allows BranchServ to identify and catalog all customer site equipment within CRM for easy reference and branch asset management. Each asset is assigned a unique serial number for tracking and reporting.

The Benefits of Asset Tagging with Site Assets:

- Provides an accurate inventory of branch equipment for customer reference and management
- Allows the FI to anticipate obsolescence and budget accordingly
- Creates a service history for each piece of branch equipment
- Creates an accurate reference point for service contract quotes
- Facilitates automatic warranty tracking and ensures no service charge for equipment under warranty
- Flags 'problem' equipment in the case of parts discontinuance by the manufacturer
- Forces validation of all existing equipment with each survey for ensured accuracy
- Facilitates better trained technicians given connection to training/reference material to specific makes/models of equipment, thereby improving service levels
- Minimizes billing issues/inaccuracies

How Is Equipment Catalogued?

Equipment is identified during (1) a site survey visit, (2) PM Visit or (3) upon installation by BranchServ and assigned a unique serial number for tracking and reporting. Key information like installation date, make, model and warranty are all captured for any new equipment installations.

How Is Service History and Warrantee Information Applied?

When a service call is placed, the BranchServ Resource Operations Center team will link the appropriate serial number to the call, thereby initiating applicable warranty and establishing an equipment service history record. The on-site technician will verify that the correct equipment is assigned to the call at the time of service to ensure data and reporting accuracy via a mobile application.

Physical Asset Tags

Physical asset tags with bar code/QR code functionality can be made available for field application, and are strongly encouraged. These facilitate optimal accuracy in cataloging and expedience in service, given that customers, CSRs and technicians will have a common reference point with no room for nomenclature bias. Physical asset tags can be BranchServ branded or FI branded depending on customer preference.

Want to learn more? Contact BranchServ today.



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