

Moving and maintaining assets

Fixed assets

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Record transfers between people and places, and keep service and repair history.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

Assets move between people and places, and they need servicing. Recording both keeps accountability clear and protects the asset's value.

Steps

Record a movement

1. Search for **Asset Movement** and click **Add Asset Movement**.
2. Choose the **Purpose**: *Transfer*, *Issue* (to an employee) or *Receipt* (back from an employee).
3. Add the assets in the table, with the **Target Location** and **To Employee**.
4. Save and submit. The asset's location and custodian update, and the history is kept.

Plan maintenance

1. Search for **Asset Maintenance** and click **Add Asset Maintenance**.
2. Choose the **Asset**, and add a **Maintenance Team** and the **Maintenance Tasks**: the name, how often (monthly, yearly) and the next due date.
3. Save. The responsible person is reminded when a task is due.

Log a repair

1. Open **Asset Repair** and click **Add**.
2. Choose the asset, add the failure date, the description and the **cost**.
3. If the repair extends the asset's life or value, ask your accountant whether to add it to the asset's cost instead of expensing it.

Practical example

The delivery van is issued to Otieno on 1 March. In June it goes for a service costing KES 18,500, recorded as an asset repair. The next service is scheduled for September.

Important notes

- Keep insurance and warranty details in the asset's notes or attachments. See Attachments and files.
- Run a physical check of assets against the register once a year.

Common mistakes

- Moving an asset physically without a record.
- Leaving a former employee as custodian.

Next steps

Read Selling and scrapping assets.

Related documentation

- Registering assets
- Selling and scrapping assets