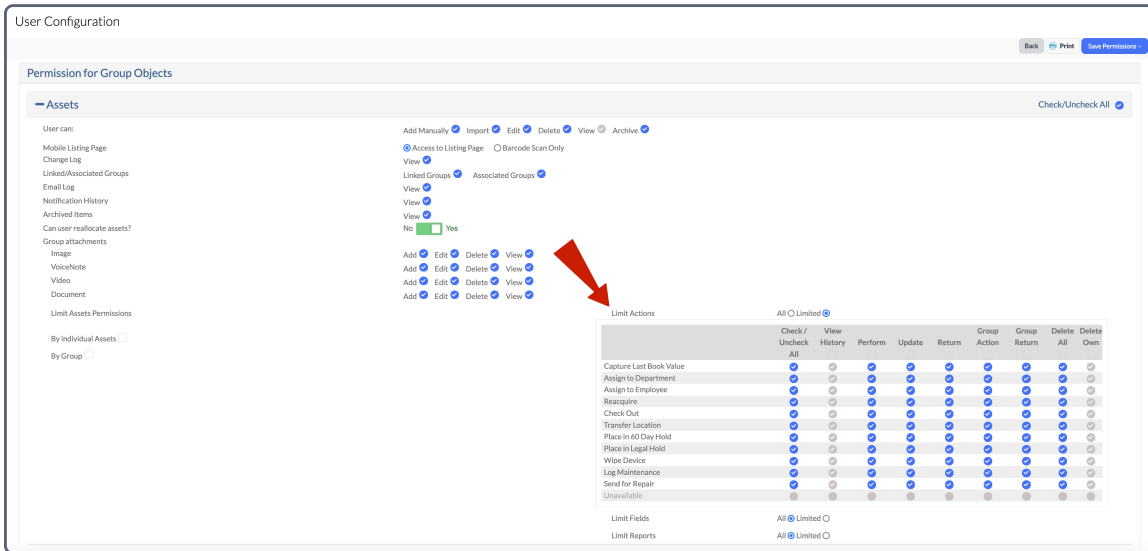


Can I adjust who has permissions to perform specific Actions?

Yes! In terms of permissions, your best bet is to navigate to your gear wheel icon in the upper righthand corner, then User Configuration (or User Template > Edit).



The screenshot shows the 'User Configuration' page with a 'Permission for Group Objects' section. Under the 'Assets' category, there are various permissions like 'Add Manually', 'Import', 'Edit', 'Delete', 'View', and 'Archive'. A table titled 'Limit Actions' is visible, with columns for 'Check/Uncheck', 'View History', 'Perform', 'Update', 'Return', 'Group Action', 'Group Return', 'Delete All', and 'Delete Own'. A red arrow points to the 'Limit Actions' table.

Limit Actions	Check/Uncheck	View History	Perform	Update	Return	Group Action	Group Return	Delete All	Delete Own
Capture Last Book Value	All	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Assign to Department	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Assign to Employee	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Reacquire	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Check Out	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Transfer Location	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Place in 60 Day Hold	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Place in Legal Hold	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Wipe Device	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Log Maintenance	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Send for Repair	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Unavailable	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
Limit Fields	All	⊙	Limited	⊙					
Limit Reports	All	⊙	Limited	⊙					

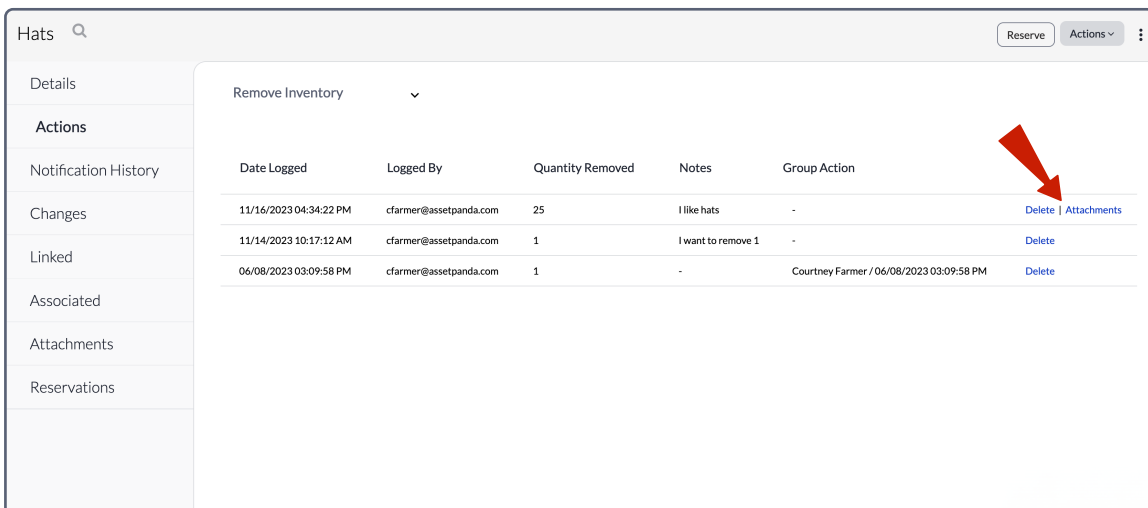
Do all Actions need to have a return option?

They do not. Just be sure to select 'No' for 'Does this Action have a return option?' within your Group Settings > Actions > Edit.

Does this action have a return option? No Yes

When you attach a document file to an asset through an Action, where are you able to access that newly attached document?

You can find this within the asset record > Actions tab from the left > Attachments.



The screenshot shows the 'Hats' asset record with the 'Actions' tab selected. A table lists actions with columns for 'Date Logged', 'Logged By', 'Quantity Removed', 'Notes', and 'Group Action'. A red arrow points to the 'Delete | Attachments' link in the 'Group Action' column.

Date Logged	Logged By	Quantity Removed	Notes	Group Action
11/16/2023 04:34:22 PM	cfarmer@assetpanda.com	25	I like hats	- Delete Attachments
11/14/2023 10:17:12 AM	cfarmer@assetpanda.com	1	I want to remove 1	- Delete
06/08/2023 03:09:58 PM	cfarmer@assetpanda.com	1	-	Courtney Farmer / 06/08/2023 03:09:58 PM Delete

✦ I have an Action created in our Work Order group that has several open fields and utilizes a pre-defined/triggered form for vehicle inspections, and this seems to work fine. However, there is no change field. I believe it was mentioned that an Action must also have at least one change field...my Inspection Form Action does not have a change field. Is that okay?

That is perfectly fine! Our presentation was simply to touch on best practices, and Change Fields are handy if there is data that needs to change when performed (e.g., if I need an Action to update my asset's location when performed).

✦ How do I make an Action that records historical data in another group?

Depending upon what data needs to be captured, and as long as there is a Source of Relation within the records to link the groups together, you can configure a Change Field to adjust data within another group. These changes can then be found within your Change Reports, the Changes tab of the records, and your Action Reports.

✦ We currently use a similar structure to monitor our inventory levels. However, we'd like to add to our inventory count when we add our assets on to the platform. Is there a way to manipulate the "Add New" button to automatically add to this inventory count without using an Action?

The Add New Icon is hard coded to be able to add new asset records (rather than add to inventory quantities). We appreciate the feedback and will consider that for potential future design!

To adjust the quantity of Inventory items, you can perform an Action, import a spreadsheet to update your quantities, perform a Reallocation to update quantities, or manually edit the individual Inventory record.

✦ Is this webinar an introduction to your software? It seems like it's for current users.

Each webinar covers a different topic that is meant to provide both current and prospective customers with a quick glimpse into the possibilities of our software. If you're not yet a customer and want a more personalized introduction to Asset Panda, you can [request a demo](#) to get started.

✦ Is there a way to tie Actions to employees as well as the asset? I use Actions to assign assets to an employee, but if I go look at that employee, I can't see historically what was assigned to them.

The best way to look at historical data about who assets have been assigned to would be to create a Change Report and/or an Action Report. You can add filters based on a field as well, which will help you see any time that a particular User Employee had an asset assigned, for instance. In this example, we are creating a Change Report to see All Changes made to the Assigned User field specifically.



✦ What is the complete cycle of inventory management, from entering inventory to generating reports?

Because there are so many variables and customizations available, we would love to set up a call to find out more about your workflow. Please reach out to support@assetpanda.com (if you are a current client) or sales@assetpanda.com and we will be happy to get you in touch with the appropriate Asset Panda talent to discuss all available options!

✦ I have set up a Group Action that produces a report of what assets are linked to a specific employee when the employee is terminated. Why can't I have an individual Action generate such a report? Ideally, I'd like to have the Action also adjust the status field of those same linked assets.

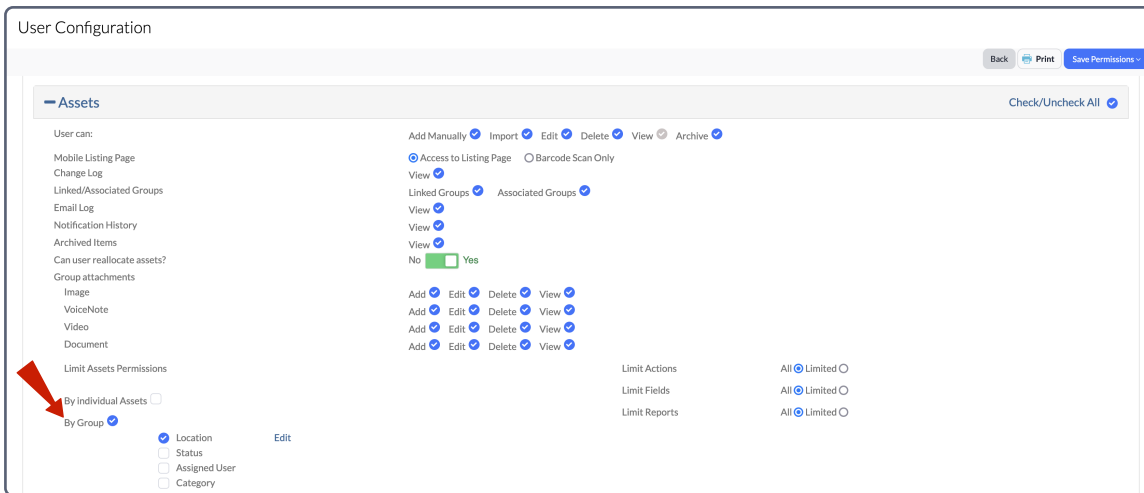
We would love to hear more about what the ideal state of this would look like for you. A Triggered Group Action report will generate based off one record so long as the Action is performed from the listing page. One example might be, I have an "Assign to Action" that, when performed in my Assets Group, will trigger a report with the asset information and will also switch the linked Employee to a status of Active once they receive the asset. Please reach out to support@assetpanda.com to further discuss this as our Product Team would love to assist and hear your feedback as well!

✦ We rent our product per serial number. Can we create an Action to create a billing ticket for our customer?

Whether this is creating the ticket as a new record in another Group (like a Ticketing Group) when performing the Action or using something like Pre-defined Forms (PDF documents that generate upon performing an Action), there are a handful of different options depending on your workflow. Please feel free to reach out to support@assetpanda.com, and they can connect you with the right Asset Panda talent to make sure you get all of your questions answered!

✦ I work at an AV Installation company, and we check company tools out to each employee. Each employee can log into Asset Panda and see exactly what is checked out to them, but not to anyone else. We also need to have the Managers view only their team's inventory and approve certain requests, but they don't need to see requests from the entire company, only the technicians assigned to them. Is this possible?

We would suggest limiting permissions by some sort of Group List (e.g., Location) in order to make this more granular as you would like. For example, I have my managers assigned to their appropriate Location based on a Location Group List Field type, and their User Permissions are set to 'view assets only' within their assigned location.



✦ How can we change the date we received/uploaded an item? I use Asset Panda for samples inventory but sometimes I don't have enough time to upload everything the same day.

For that, a Date Field type in the asset record is likely the best bet (as opposed to a Date Stamp field type that is not editable). A Date Field can be edited with the proper permissions, so when the time permits to go through and update records, you and your team can edit that field with the correct date(s).

✦ Is there a way to link/concatenate values? I don't think I've seen such a function yet.

At this time there is not, but we would love to hear more about what you're looking for and how it would benefit your workflow. Please reach out to productteam@assetpanda.com and we will be happy to submit your Feature Request!

✦ In the Dashboard view, we are currently unable to visualize and track the Actions but rather the group fields - is this something you're considering in the near future? We would like to track each time a particular Action is utilized.

Though we currently do not have this feature, we will be happy to submit a Feature Request on your behalf to our Product Team for consideration in a potential future update. Please reach out to support@assetpanda.com so that we can open a ticket on your behalf, and our teams can reach out for additional feedback!

✦ Is there any way to copy/duplicate an Action from one group to another? For example, I want the same Action within an asset group to a consumable group.

At this time, there is not a way to duplicate Actions from one Group to another. This is because of the customizability of Groups and their varying settings, which could run the risk of not copying properly if settings are not uniform between the different Groups.

✦ When looking at endpoints for the sake of APIs, will we be able to access all the Action field inputs?

Please refer to our available API calls with regards to Actions here: [Create Group Action \(readme.io\)](#). If there are any endpoints that are not available, please reach out to support@assetpanda.com and let us know what you are looking for. We are always more than happy to ask our team of engineers if there are additional options that can be implemented.

✦ Do you have integration with Dynamics AX, Mosyle, Adobe Sign, Sage X3, or Oracle?

Not yet, but this has been passed along to our Integrations team to ask that they look into adding this to the roadmap.

✦ Is it possible to log on with 2FA/MFA via Microsoft, Google Auth, or Okta?


Though Asset Panda does not currently directly support 2FA/MFA, we have many clients who utilize 2FA via their SSO provider, and we provide SSO integrations at no additional cost.

✦ I'm having trouble finding a way to check out an individual asset after I have scanned the barcode on my mobile device or online (only in group Actions).




Please reach out to our team at support@assetpanda.com. We would be happy to assist in troubleshooting and finding a proper resolution so that you are able to complete that Action.

✦ How does the auto-return option work?

This automatically performs the 'return' of an Action on a designated date. When you select 'Yes' for the auto-return option in the Action settings, an Auto-Return Field type becomes available to specify the date that the record will need to be returned.

Does this action have an auto-return option?  No Yes

Action Open Field

History/Report Label* 	<input type="text" value="Auto Return Date"/>
Full Text Field Display/Message 	<input type="text" value="Specify Auto-Return Date Here"/>
Type* 	<input type="text" value="Auto Return Date"/>
Required?	<input type="checkbox"/>
Editable?	<input type="checkbox"/>

Helpful Links

Watch the webinar recording at any time [here](#).
[Read our blog post](#) to learn more about Actions.
[Visit our Knowledge Center](#) for step-by-step tips to configure and use Actions

Contact Information

Are you an Asset Panda customer?
Email support@assetpanda.com if you have a question.

Don't have an Asset Panda account?
[Schedule a demo](#) to learn more about what we can do for you.