"Equipment" module

Since the information on housing is very broad, three separate modules deal with this subject:

- The [Residence] module for the building (s)
 The [Equipment] module for its contents
- The module [Operation] for the current household expenses and the costs related to the maintenance of the installations.

The [Equipment] module allows you to list all the fixed and mobile equipment in each dwelling and to know its value.

The validity of the guarantees may also be monitored.

Invoices can either be entered directly in the [Residence] module or entered and paid from the [Invoices] module. Once the payment has been validated in the [Invoices] module, they will be automatically added to the relevant tab of the [Residence] module.

Table of contents

Summary of module tabs

[Passport]	Overview of furniture and household objects
[Documents]	Non-financial documents
[Furniture]	List of furniture in the home
[Valuables]	List of objects of value in the dwelling
[Household appliances]	List of home appliances in the dwelling
[TV / Audio]	List of TV / Audio devices in the dwelling
[Photo / Telephony]	Camera and phone list
[Hardware/Software]	List of computer equipment
[Garden]	List of garden tools
[Various items]	Miscellaneous objects
[Lent items]	List of objects lent
[Equipment]	List of equipment with maintenance and / or certification
[Maintenance / Repair]	Maintenance and repair costs related to existing objects
[Cash flow]	Inbound and outbound cash related to the equipment
[Notepad]	This is the area for various notes about the current module
[Reports]	Selection of information to print

[Passport]
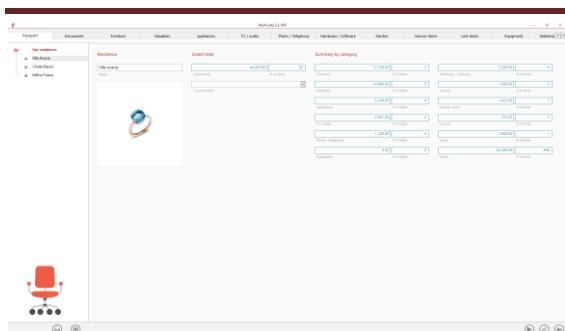
The [Equipment] module [Passport] provides an overview of the number of objects owned by the household and shows their purchase value by category.

It also calculates the total value of the household inventory.

The objects listed in the [Furniture] and [Valuables] tabs will appear in the [Net worth] tab of the [Financial Statements] module provided that an amount is entered in the [Last Estimated Value] field. The value displayed in the Heritage tab will be [Estimated Value].

A randomly selected image in one of the categories is displayed each time the module is opened.

The button provides access to different appraisal reports covering furniture and valuables:

- Appraisal report for insurance

- Appraisal report for successions

- Report with estimated values only

- Report with replacement values only

- Evaluation categories

To ensure that totals for purchased value, estimated values and replacement values are coherent, MyPrivate will estimate missing values as follows – these will be printed in light grey on the report:

- for missing purchase prices, the replacement value, or the estimated value

- for missing estimated values, the replacement value, or the purchase price

- for missing replacement values, the purchase price, or the estimated value

Special fields:

[Consolidation]: this field allows you to include the inventory of a secondary residence into the primary residence. This applies only to the various appraisal reports.
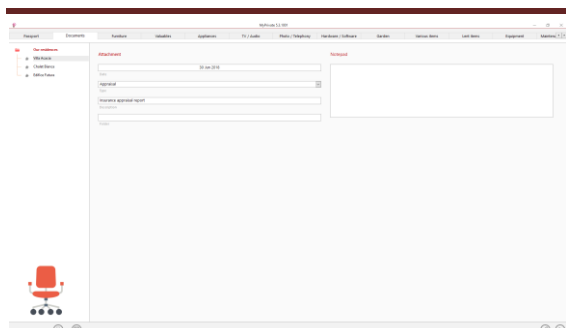
[Documents] - Summary
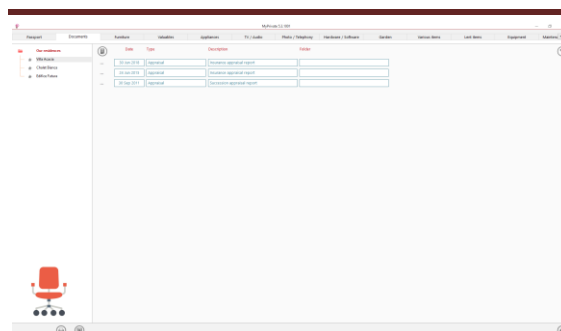
This tab allows you to scan and preserve all types of documents by assigning them a date, a type and a title. A summary of documents related to the place of residence is displayed and allows a quick view of the documents available.

To add a new document, click on the icon

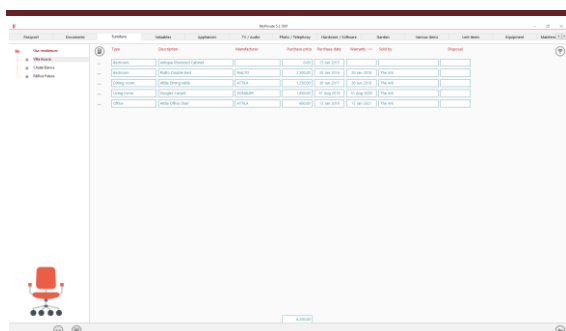The screen below opens:

[Documents] - Details

Enter the date of the document, a type (select an existing type from the drop-down menu or enter a new one) and a description. These three items will appear in the [Documents] - Summary. The [Notepad] field is for adding additional information.

Once these fields are filled, click on the icon

to start scanning documents.

For scanning and document integration, refer to the "Document Management" user manual.

[Furniture] - Summary
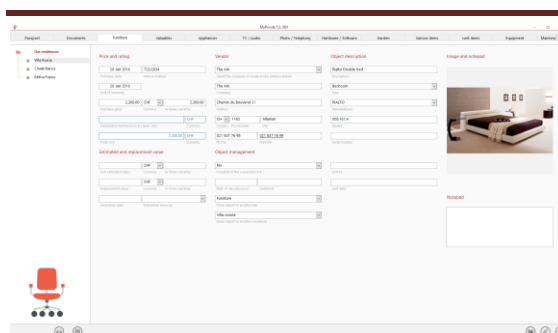

Displays the complete list of furniture for the selected home.

To view and/or edit the details of a record, click on the [...] field on its left.

[Furniture] - Detail

Detailed information about the furniture.

Special fields :

[Cumulated maintenance & repair costs]:

For each object, this field shows the total amount of maintenance and repair costs inserted in the [Maintenance / Repairs] tab of the [Equipment] module.

[Total cost]:

This field displays the total purchase price + maintenance and repair costs. It is thus possible to know the total amount spent on an object since its acquisition.

[Last Estimated Value]:

This amount indicates the last estimated value of the object. This value will be listed in the [Net worth] tab of the [Financial Statements] module.

[Replacement Value]:

This amount indicates the cost of obtaining an object identical to the original, which may be different from the estimated value.

 [Included in the succession list]:

If the drop-down menu is set to "YES", the object will appear in the [Furniture] tab of the [Succession] module.

[Date of obsolescence]:

Allows you to specify a date when the object is obsolete / no more in your possession, but for which you still want to keep a history. If a date is inserted in this field, the object will no longer be valued in the inventory and will even disappear lists if this was indicated in the [Control Panel].

[Move object to another tab]:

Allows you to choose from the drop-down menu another tab of the [Equipment] module to which the object will be moved.

[Move object to another residence]:

Allows you to choose from the drop-down menu another Residence to which the object will be moved.

[Lent to]:

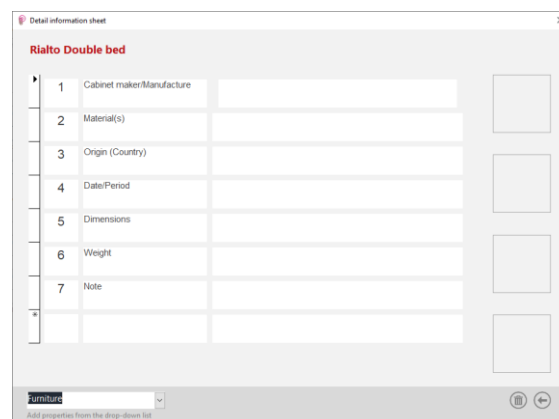In the case where the object has been lent, it is possible to enter a name

[Lent date]:

In case the object has been lent, it is possible to enter the date

If a date and / or a name are inserted in the lent fields, the object will automatically appear in the list of the [Lent items] tab. To remove it from the list, it is enough to delete the info of the fields date and / or name.
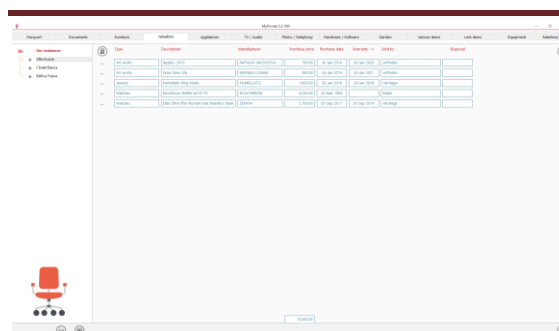
The button ⬚ provides access to the screen for entry of the object's attributes and detailed information:

MyPrivate provides 28 object categories (African art, Glassware, Sculptures, ...). By choosing a category from the drop-down box at the bottom of the screen, the associated attributes will be added automatically. Attributes can be added, modified and deleted as needed. Note that attributes without corresponding values will not be printed on the reports. For improved readability, individual lines can be underlined by double-clicking the fields.

It is possible to add attributes of multiple categories to the same object. For example, for jewelry the attributes of the category [Jewelry] will be used to describe the object as a whole, whereas the category [Jewelry/Stones] may be used to describe one or more stones on the object.
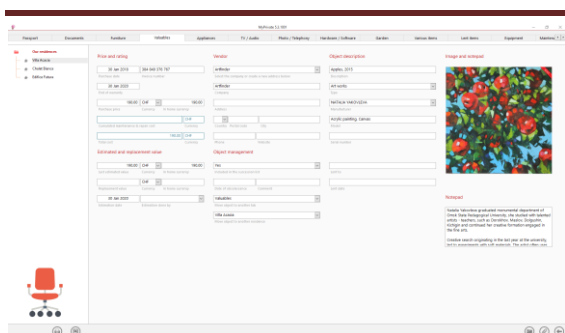
[Valuables] - Summary

Displays a complete list of valuables related to the selected dwelling.

To view and/or edit the details of a record, click on the [...] field on its left.
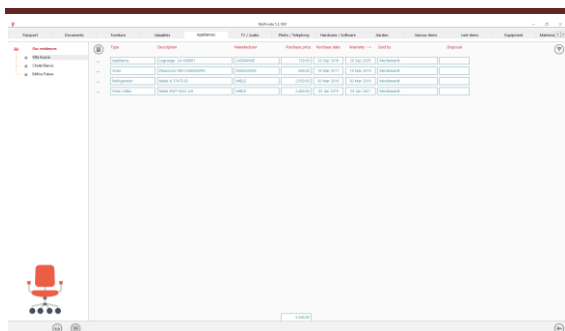
[Valuables] - Detail

Detailed information about the furniture.

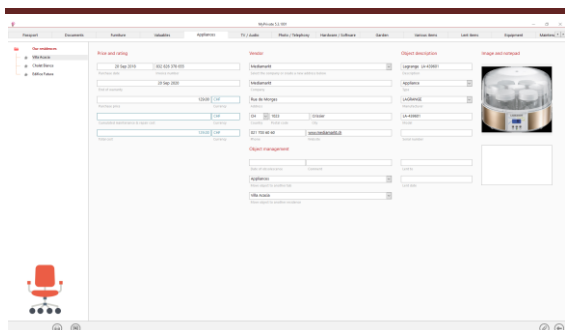Specific fields: See: [Furniture] - Detail

[Appliances] - Summary

Displays the complete list of household appliances related to the selected home.

To view and/or edit the details of a record, click on the [...] field on its left.

[Appliances] - Detail

Detailed information on household appliances.

Special fields:

[Total Maintenance and Repair Costs]:

For each object, this field shows the total amount of maintenance and repair costs inserted in the [Maintenance / Repairs] tab of the [Equipment] module.

[Total cost]

This field displays the total purchase price + maintenance and repair costs. It is thus possible to know the total amount spent on an object since its acquisition.

[Date of obsolescence]:

Allows you to specify a date when the object is obsolete / more in your possession, but for which you still want to keep a history. If a date is inserted in this field, the object will no longer be valued in the inventory and will even disappear lists if this was indicated in the [Control Panel].

[Move object to another tab]:

Allows you to choose from the drop-down menu another tab of the [Equipment] module to which the object will be moved.
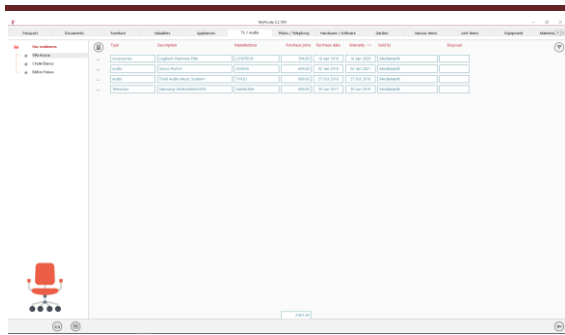
[Lent to]:

In the case where the object has been lent, it is possible to enter a name

[Lent date]:

In case the object has been lent, it is possible to enter the date

If a date and / or a name are inserted in the loan fields, the object will automatically appear in the list of the [Loaned Objects] tab. To remove it is enough to delete the info of the fields date and / or name.
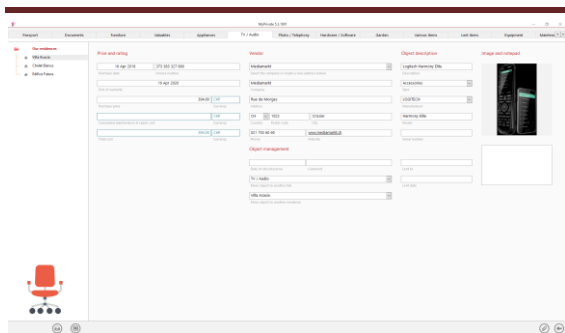
[TV / Audio] - Summary

Displays a complete list of TV / Audio objects related to the selected home.

To view and/or edit the details of a record, click on the [...] field on its left.
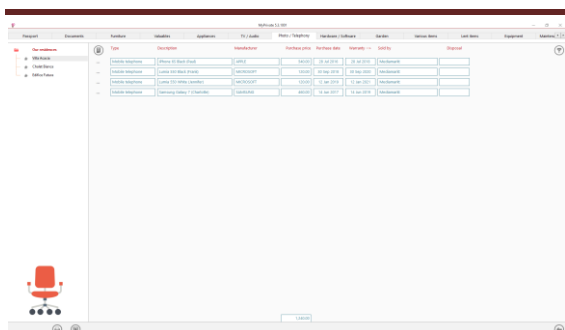
[TV / Audio] - Detail

Detailed information about TV / Audio objects.

Specific fields:
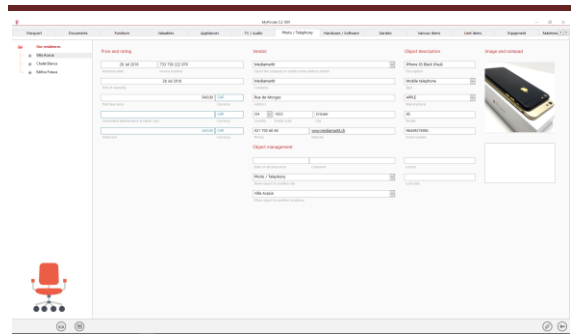See: [Household Appliances] - Detail

[Photo / Telephony] - Summary

Displays a complete list of Photo / Telephony objects related to the selected home.

To view and/or edit the details of a record, click on the [...] field on its left.
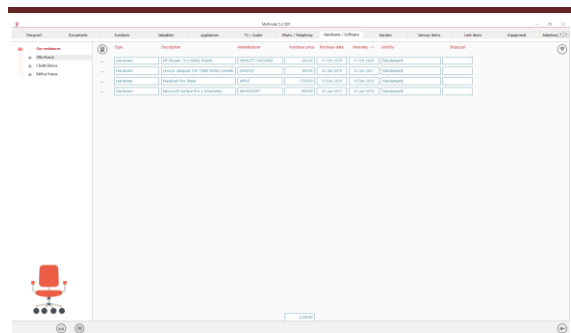
[Photo / Telephony] - Detail

Detailed information about Photo / Telephony objects.

Specific fields:
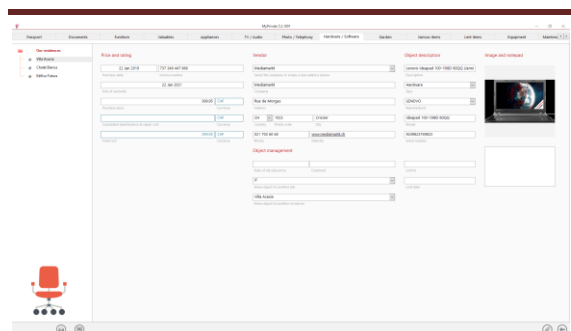 See: [Household Appliances] - Detail

[Hardware / Software] - Summary

Displays a complete list of computer devices related to the selected dwelling.

To view and/or edit the details of a record, click on the [...] field on its left.
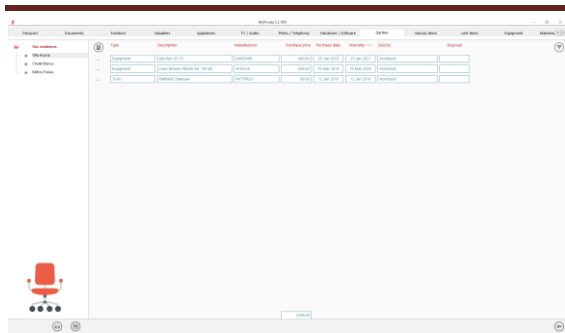
[Hardware / Software] - Detail

Detailed information on computers devices.

Specific fields:
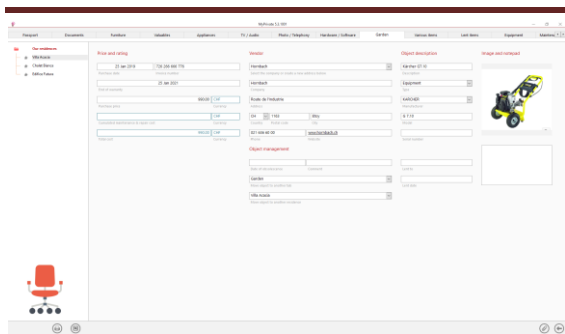See: [Household Appliances] - Detail

[Garden] - Summary

Displays a complete list of objects related to the selected dwelling.

To view and/or edit the details of a record, click on the [...] field on its left.
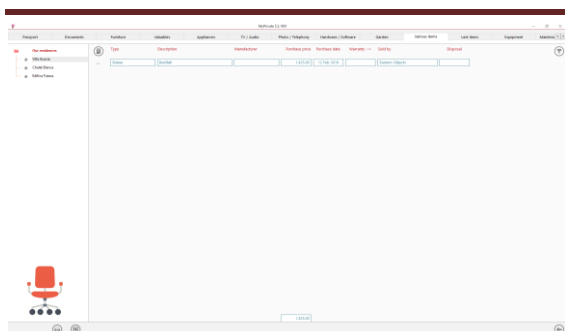
[Garden] - Detail

Detailed information about tools and machines used in the garden.

Specific fields:
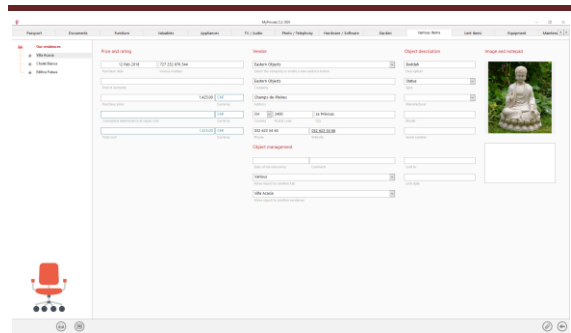See: [Household Appliances] - Detail

[Various items] - Summary

Displays a complete list of devices related to the selected dwelling.

To view and/or edit the details of a record, click on the [...] field on its left.
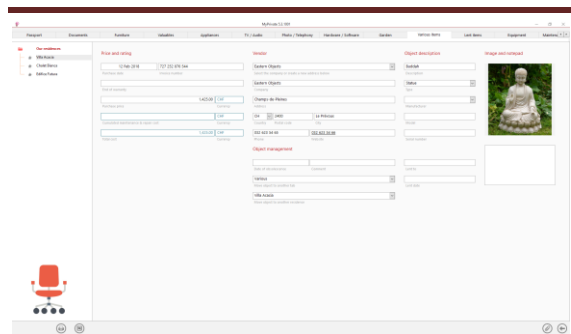
[Various items] - Detail

Detailed information on miscellaneous objects that cannot be integrated into other tabs.

Specific fields:
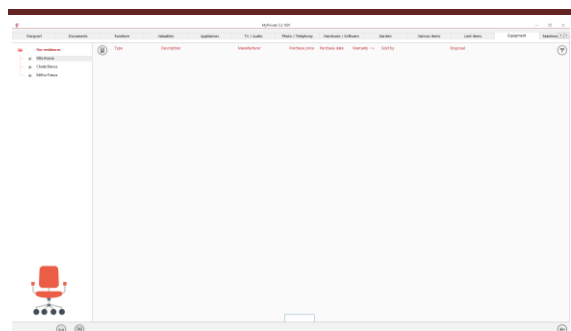See: [Household Appliances] - Detail

[Lent items]

Displays a complete list of loaned items.

All the tabs of the [Equipment] module allow you to mark objects as loaned
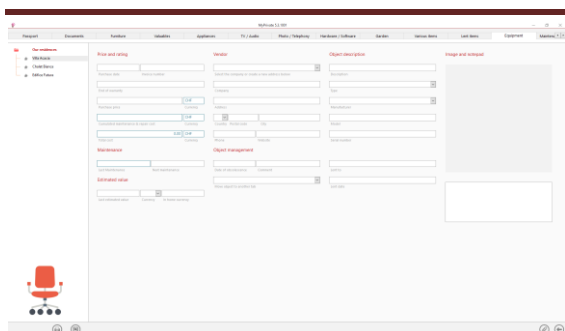
[Equipment] - Summary

Displays the complete list of equipment in the place of residence, such as:

- Heating & air-conditioning
- Tanks and cisterns

- Fire detection and prevention
- Intrusion detection and prevention

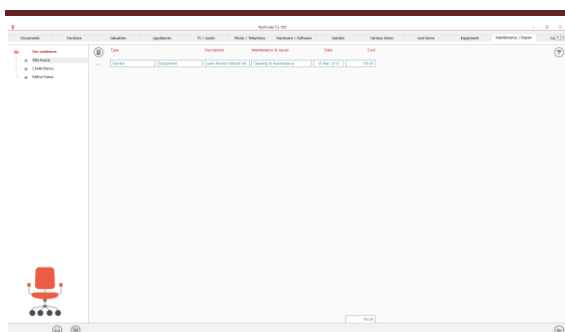## [Equipment] - Details

Show item details

Particularity of this tab :

A date of next service or certification can be entered. It will automatically appear in the calendar of events.

[Last Estimated Value]:

This amount indicates the last estimated value of the object. This value will be listed in the [Net worth] tab of the [Financial Statements] module.

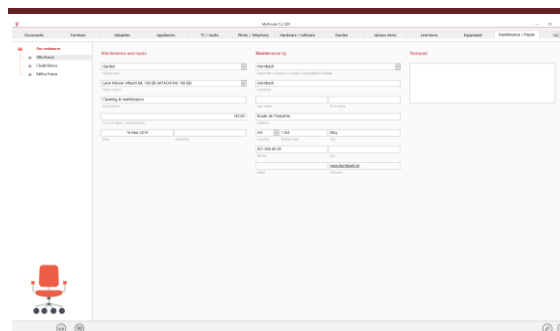## [Maintenance / Repairs] - Summary

Displays a complete list of repairs and maintenance costs on objects related to the selected home.

The [Service / Repairs] tab records maintenance and repair costs for existing equipment. The total amount of these costs will be visible in the detail of the object.

To view and/or edit the details of a record, click on the [...] field on its left.

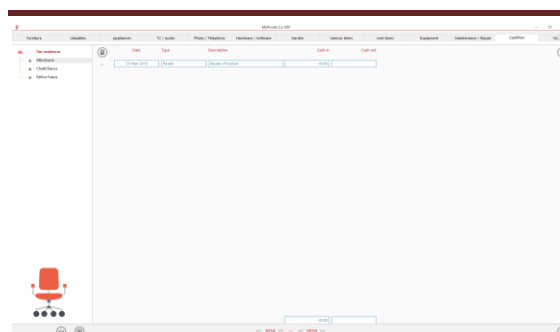## [Maintenance / Repairs] - Details

Detailed information on repairs and maintenance costs.

Particularity of this tab :

The fee amounts will be automatically added to the objects and visible on their respective tabs.
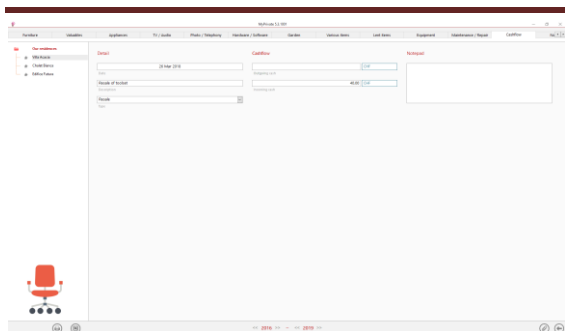
[Cash Flow] - Summary

This view shows a summary of the cash flows linked to the equipment, which could not be integrated into the existing tabs, for example to insert the amount of cash following the sale of an object.
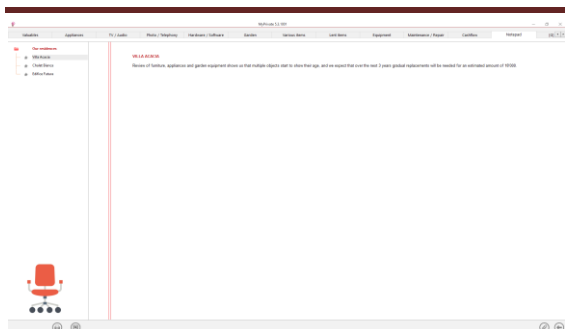
To view and/or edit the details of a record, click on the [...] field on its left.

Cash flows are also visible in the [Cash Flows] tab of the [Financial Statements] module.
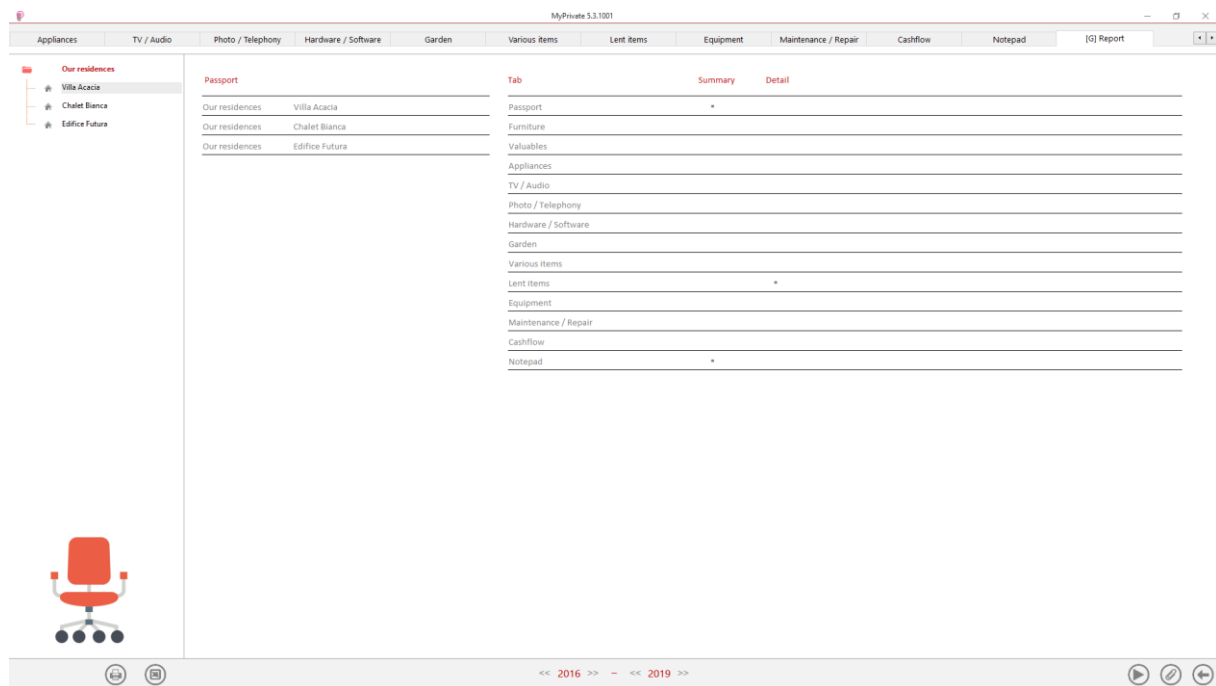
[Cash Flow] - Details

[Notepad]

This tab allows you to enter various notes related to the equipment.

[Reports]

This tab allows you to choose which passports and tabs to print

Select/deselect the data to be printed by clicking on the corresponding line (s) and column (s).

The choices are

- Passports
- Tabs - Summary and details

The selected passports and tabs are marked with the character [✓].

For some tabs it is possible to print the summary and/or the details.

When a print option is not available, it is indicated by the character [·].

Once the information to be printed has been chosen, click on the button ⊙ then choose the [Generate Report] option.

MyPrivate prepares a PDF file that will be ready for printing.