Summary

Assets allow you to track specific information about the products and services purchased or installed by customer accounts or contacts. Use assets to track everything you need to know about a customer's existing products.

Best Practices

- Create new assets from the Assets related list on an account or contact detail page.
- Find assets by entering your search terms like asset name or serial number in the sidebar and clicking **Search**.
- Manage asset lists from the Products tab.

Implementation Tips

Assets are available from many existing tabs depending on the action. For example, create new assets from the Assets related list on an account or contact; create asset list views from the Products tab. Use the tips below to customize assets to fit your needs.

- Add the Assets related list to your account, contact, and product page layouts so that users can create assets from these related lists. Inform users to go to an account or contact and click **New** above this related list to create an asset.

- If you do not track serial numbers, consider removing the `Serial Number` field from your asset page layouts. Instead, you may want to use the `Quantity` field to track the sale of multiple licenses or services.

- Use the lookup icon (🔍) to select a product for an asset; the selected product name is inserted in the `Product` and `Asset Name` fields.

- If you know the exact name of the product for an asset, enter it in the `Product` field instead of clicking the lookup icon (🔍). Click **Save** to store the entry in both the `Product` and `Asset Name` fields.

- Add the Cases related list to your product and asset page layouts so that users can quickly view a list of cases for a product or asset.

- Add the `Asset` field to your case page layouts. If necessary for your organization, make this field required using field-level security settings.

- Your users should have permissions to read, create, edit, and delete assets. However, you may want to restrict certain users from deleting assets. If so, revise your users' permissions, which are granted in permission sets and profiles. If you remove the "Read" permission on assets, users will not see any assets, asset fields, or Asset related lists.

- Optionally, rename "Asset" to a term suitable for your business. From Setup, enter *Rename Tabs and Labels* in the `Quick Find` box, then select **Rename Tabs and Labels**.

Managing Assets for Consumers

If your customers include consumers, you may have made some customizations to Salesforce to handle your unique business process. For example, you may have created a single account called "Consumers" that links to each consumer contact record. Use the following suggestions to customize your implementation of assets to handle consumer assets:

- If you sell products using a distributor or vendor, use the `Account` field on the asset to store the distributor or vendor account name. If necessary, you can add a contact that is associated with a different account. The asset will display on the contact selected on the asset as well as the account selected on the asset, however, it will not display on the account of the contact. If you only choose a contact, the asset will display on both the contact and the contact's account.

- If you do not use a distributor or vendor, consider removing the `Account` field from asset page layouts.

Tracking Competitive Products

Assets are a convenient way of tracking what competitor's products may exist at your accounts. Use the following suggestions to implement assets for competitor's products:

- Make sure the `Product` field on an asset is not required and instruct users not to use it when creating a competitor asset.

- Tell users to check the `Competitor Asset` box for competitors' products.

- Run the "Assets without products" report to compile a list of assets that are not based on one of your products.

- If you create custom fields for assets, do not make them required. Users may want to create new assets directly from cases but the *lookup* dialog only retrieves standard asset fields.