

Digital Handover

We've digitised and simplified the process of supplying a machine and all required documentation post-sale, empowering you to easily meet safety obligations when selling machines. Here we'll show you how it works.

15 Steps [View most recent version](#) 

Created by

Plant Assessor

Creation Date

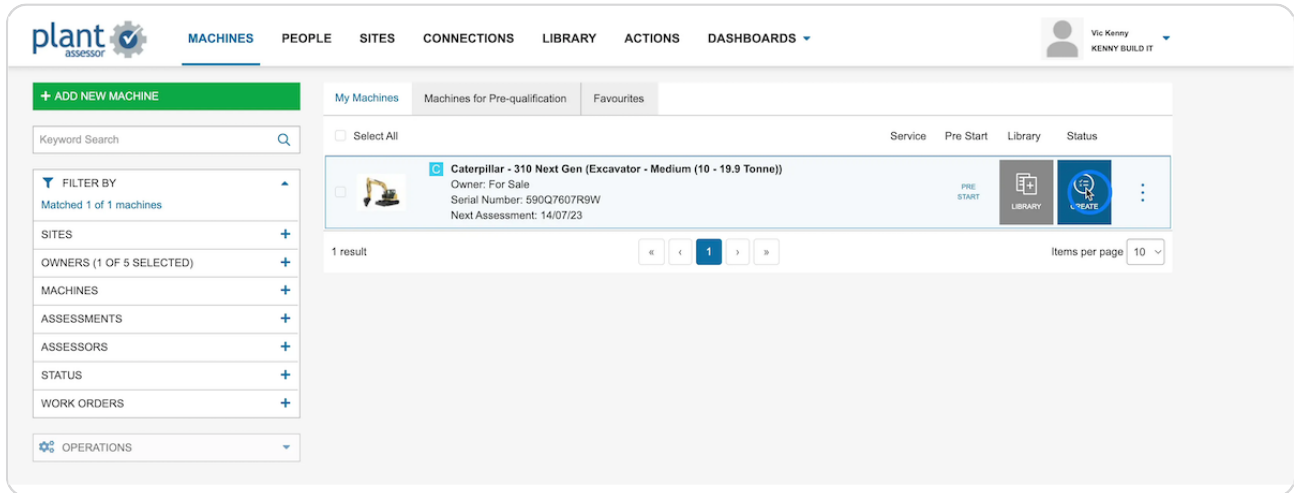
July 14, 2023

Last Updated

July 17, 2023

STEP 1

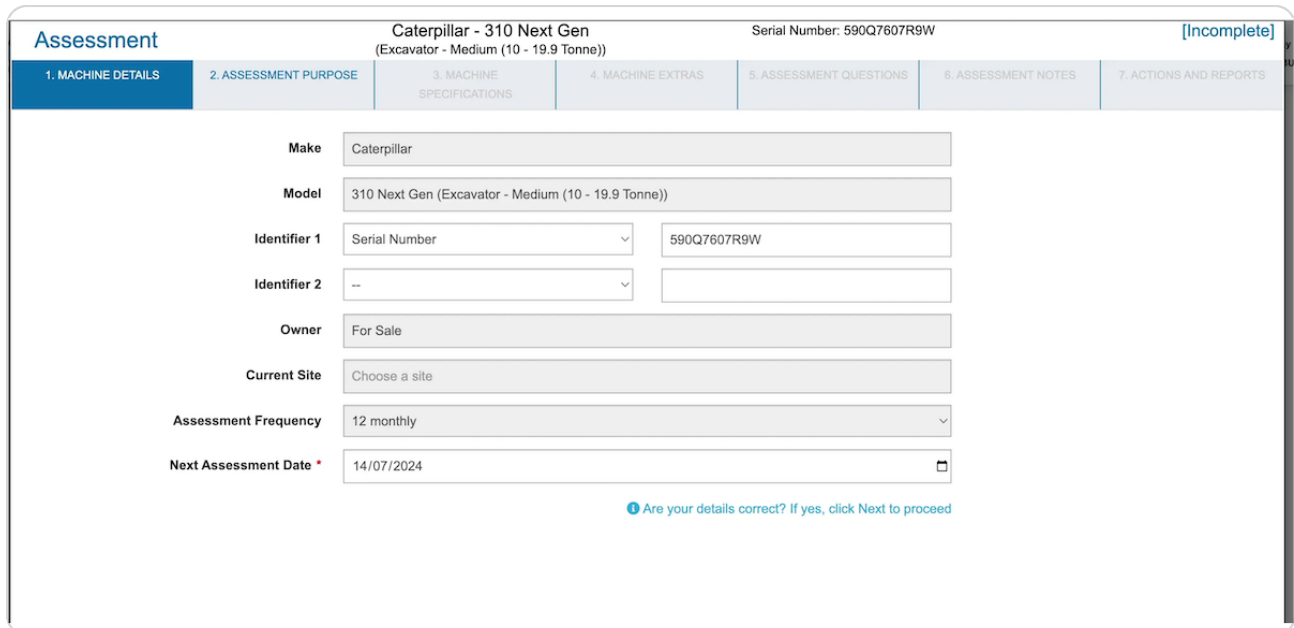
The first step of the Digital Handover process is to conduct a Sale Risk Assessment against the machine being sold. Click CREATE



The screenshot shows the 'plant assessor' dashboard. The top navigation bar includes 'MACHINES', 'PEOPLE', 'SITES', 'CONNECTIONS', 'LIBRARY', 'ACTIONS', and 'DASHBOARDS'. A user profile for 'Vic Kenny' is visible in the top right. On the left, there is a sidebar with a search bar and a 'FILTER BY' section containing categories like SITES, OWNERS, MACHINES, ASSESSMENTS, ASSESSORS, STATUS, and WORK ORDERS. The main content area shows a search result for 'Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))'. The machine details include 'Owner: For Sale', 'Serial Number: 590Q7607R9W', and 'Next Assessment: 14/07/23'. Action buttons for 'PRE START', 'LIBRARY', and 'CREATE' are visible. A pagination control shows '1 result' and 'Items per page 10'.

STEP 2

Ensure all the machine details are correct. If yes, click Next to proceed



The screenshot shows the 'Assessment' form for a 'Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))' with 'Serial Number: 590Q7607R9W'. The form is divided into seven sections: 1. MACHINE DETAILS, 2. ASSESSMENT PURPOSE, 3. MACHINE SPECIFICATIONS, 4. MACHINE EXTRAS, 5. ASSESSMENT QUESTIONS, 6. ASSESSMENT NOTES, and 7. ACTIONS AND REPORTS. The '1. MACHINE DETAILS' section is active and contains the following fields: 'Make' (Caterpillar), 'Model' (310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))), 'Identifier 1' (Serial Number dropdown with value 590Q7607R9W), 'Identifier 2' (dropdown with value --), 'Owner' (For Sale), 'Current Site' (Choose a site), 'Assessment Frequency' (12 monthly dropdown), and 'Next Assessment Date' (14/07/2024). A blue notification icon and text at the bottom of the form state: 'Are your details correct? If yes, click Next to proceed'. The top right corner of the form has a '[Incomplete]' status.

STEP 3

Select Sale from the Purpose drop down menu and follow the prompts of the assessment.

It is important to ensure that the State and the name of the Assessor is correct as these will appear on the final report.

Assessment Serial Number: 590Q7607R9W [Incomplete]

Caterpillar - 310 Next Gen
(Excavator - Medium (10 - 19.9 Tonne))

1. MACHINE DETAILS | **2. ASSESSMENT PURPOSE** | 3. MACHINE SPECIFICATIONS | 4. MACHINE EXTRAS | 5. ASSESSMENT QUESTIONS | 6. ASSESSMENT NOTES | 7. ACTIONS AND REPORTS

Site Acceptance Checklist must also have a site selected.

Purpose * Sale

State * NSW

Created By Vic Kenny

Assessor * Vic Kenny

Assistant Assessor(s)

Customer Name

Parts / Scrap

ⓘ The following fields will be locked and cannot be changed after this point - Purpose, State, Parts/Scrap
To create a paper copy assessment click Print Survey. To complete online, click Next.

STEP 4

Once the Sale Assessment is completed, a MARK AS SOLD button will appear next to the machine.

plant assessor Vic Kenny
KENNY BUILD IT

MACHINES PEOPLE SITES CONNECTIONS LIBRARY ACTIONS DASHBOARDS

+ ADD NEW MACHINE

My Machines | Machines for Pre-qualification | Favourites

Keyword Search

FILTER BY
Matched 1 of 1 machines

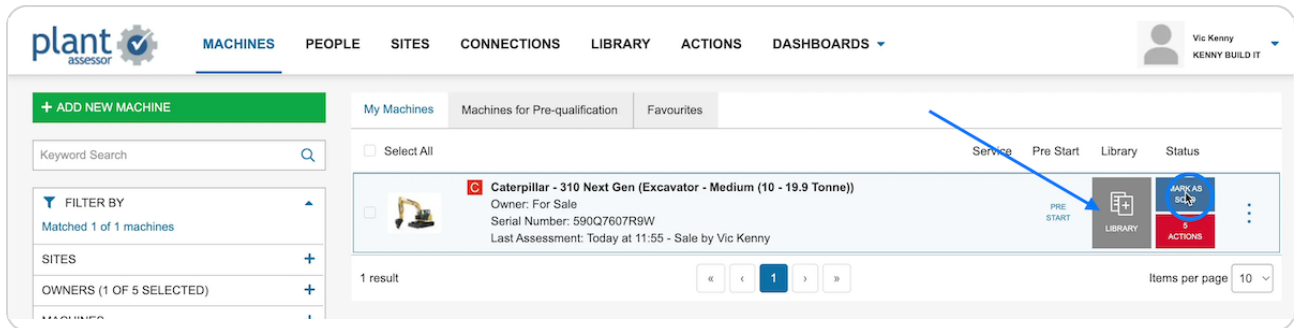
SITES +
OWNERS (1 OF 5 SELECTED) +

	Service	Pre Start	Library	Status
<input type="checkbox"/> Select All				
<input type="checkbox"/> Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne)) Owner: For Sale Serial Number: 590Q7607R9W Last Assessment: Today at 11:55 - Sale by Vic Kenny		PRE START	LIBRARY	MARK AS SOLD 5 ACTIONS

1 result Items per page 10

STEP 5

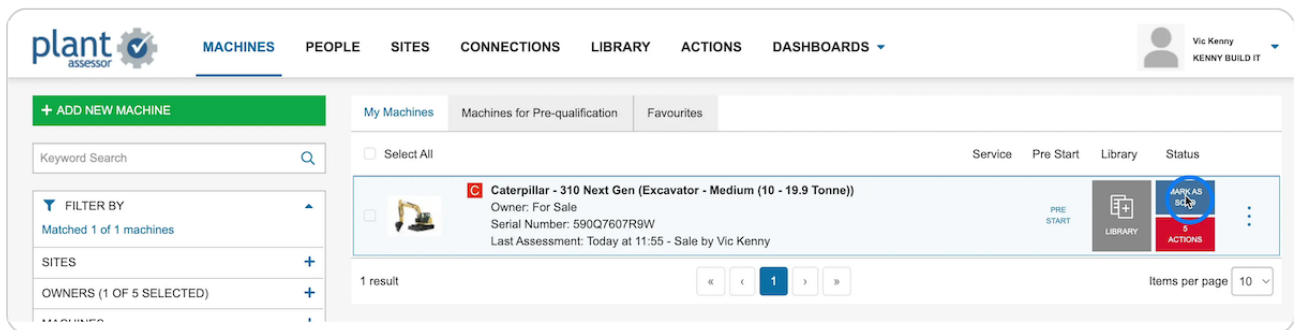
Before marking as sold, ensure all required handover documents such as Warranty and Operator manuals have been uploaded into the machine's library.



The screenshot shows the 'plant assessor' web application interface. The top navigation bar includes 'MACHINES', 'PEOPLE', 'SITES', 'CONNECTIONS', 'LIBRARY', 'ACTIONS', and 'DASHBOARDS'. The user is logged in as 'Vic Kenny KENNY BUILD IT'. The main content area displays a list of machines under the 'My Machines' tab. A single machine is listed: 'Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))'. The machine details include 'Owner: For Sale', 'Serial Number: 590Q7607R9W', and 'Last Assessment: Today at 11:55 - Sale by Vic Kenny'. The machine's status is 'PRE START'. The actions menu for this machine includes 'LIBRARY', 'MARK AS SOLD', and '5 ACTIONS'. A blue arrow points to the 'MARK AS SOLD' button.

STEP 6

Once all documents are uploaded and you are ready to transfer ownership to the buyer, click **MARK AS SOLD**



This screenshot is identical to the one in Step 5, showing the 'plant assessor' web application interface. The machine listing for 'Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))' is visible. The 'MARK AS SOLD' button in the actions menu is now highlighted with a blue border, indicating it is the next step in the process.

STEP 7

If transferring to an existing buyer, you can select from the drop down menu. Otherwise click Add New Buyer

Mark as Sold
Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))
Serial Number: 590Q7607R9W

Buyer * Select existing buyer **+ ADD NEW BUYER**

Sale Notes Enter notes here

Marking a machine as sold will remove it from your fleet and transfer it to the buyer along with the sale assessment and any documents in the machine library.

A summary of this transaction will be emailed to you, and a notification of the transfer will be sent to the buyer.

MARK AS SOLD **X CANCEL**

STEP 8

Enter the buyers details. If the buyer is an existing Plant Assessor member, ensure that the email entered is associated to their account.

*Non-Plant Assessor members, they will receive notification to create a FREE account to accept the machine and download all provided documents.

Mark as Sold
Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))
Serial Number: 590Q7607R9W

Buyer * Select existing buyer **+ CANCEL ADD**

Buyer Company Name * JD Construction

First Name * J

Last Name * Kenny

Email * @gmail.com

Sale Notes Enter notes here

Marking a machine as sold will remove it from your fleet and transfer it to the buyer along with the sale assessment and any documents in the machine library.

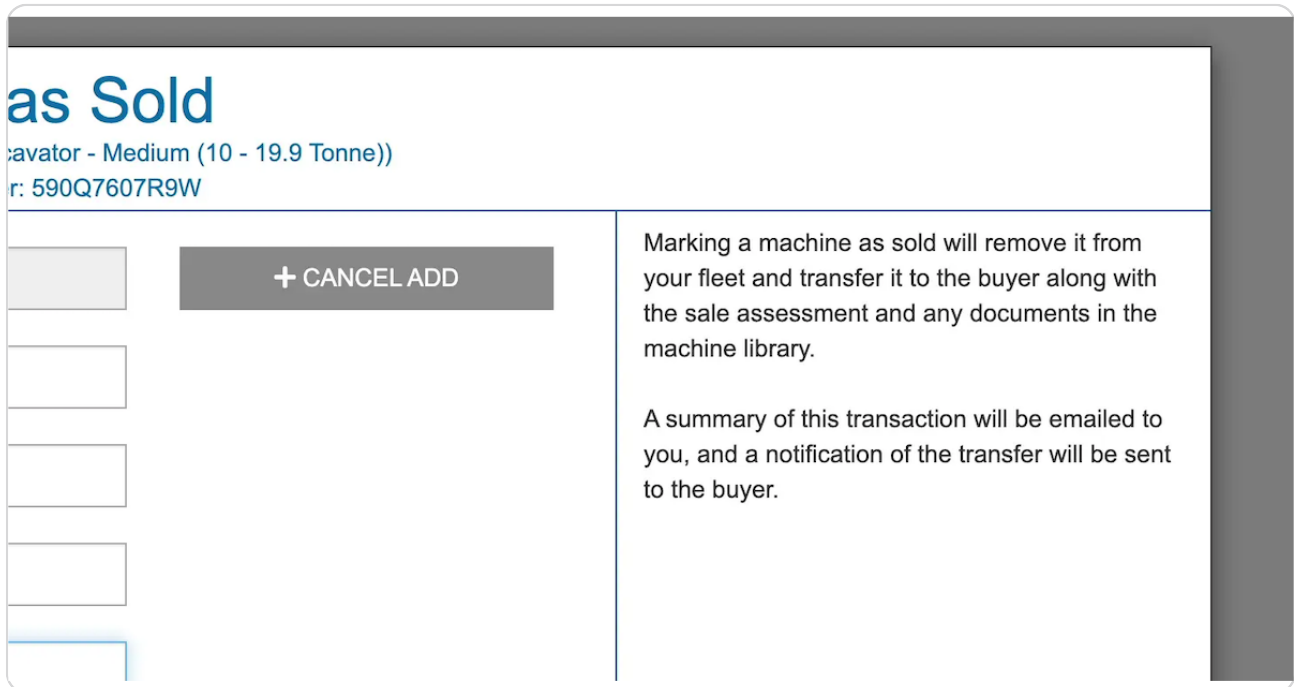
A summary of this transaction will be emailed to you, and a notification of the transfer will be sent to the buyer.

MARK AS SOLD **X CANCEL**

STEP 9

Take note that once you mark as sold, the machine will no longer be active in your account and the buyer will gain ownership in their Plant Assessor account.


*Non-Plant Assessor members will receive notification to create a FREE account to accept the machine and download all provided documents.



The screenshot shows a dialog box titled "Mark as Sold" for a "Excavator - Medium (10 - 19.9 Tonne)" with serial number "590Q7607R9W". On the left side, there are several empty input fields and a grey button labeled "+ CANCEL ADD". The right side of the dialog contains two paragraphs of text: "Marking a machine as sold will remove it from your fleet and transfer it to the buyer along with the sale assessment and any documents in the machine library." and "A summary of this transaction will be emailed to you, and a notification of the transfer will be sent to the buyer."

STEP 10

Click Mark as sold to complete the transaction



The screenshot shows the bottom portion of the dialog box, focusing on the action buttons. There is a green button labeled "MARK AS SOLD" and a grey button labeled "X CANCEL". A blue circle highlights the "MARK AS SOLD" button, with a mouse cursor pointing at it.

STEP 11

A record of the machine will still remain in your account for reporting and auditing purposes. Simply select 'removed machines' in the Fleet Status filter

The screenshot shows the 'plant assessor' interface. The top navigation bar includes 'MACHINES', 'PEOPLE', 'SITES', 'CONNECTIONS', 'LIBRARY', 'ACTIONS', and 'DASHBOARDS'. A green button '+ ADD NEW MACHINE' is visible. A search bar and filter section are on the left. The filter 'MACHINES (1 FILTER)' is expanded, showing 'Fleet Status' set to 'Removed Machines'. The main content area shows a list of machines with one entry: 'Caterpillar - 310 Next Gen (Excavator - Medium (10 - 19.9 Tonne))'. The entry includes details like 'Owner: For Sale', 'Serial Number: 590Q7607R9W', and 'Last Assessment: Today at 11:55 - Sale by Vic Kenny'. The status 'REMOVED FROM FLEET' is prominently displayed in red text and circled in blue.

STEP 12

A details of the recipient and time of sale are recorded on the machine details tab

The screenshot shows the '1. MACHINE DETAILS' tab for the 'Caterpillar - 310 Next Gen' excavator. The machine is identified as 'EXCAVATOR - MEDIUM (10 - 19.9 TONNE)'. The 'Identifiers' section includes a 'Serial Number' field with the value '590Q7607R9W' and an 'Owner' field with the value 'For Sale'. There are buttons for 'UPLOAD PHOTO', 'REMOVE', and 'UPLOAD IR'. Below the details, there are expandable sections for 'SERVICE DETAILS', 'NEXT ASSESSMENT DETAILS', and 'DEFAULT ASSESSMENT FIELDS'. At the bottom, a red text notification states 'REMOVED FROM FLEET on 14-Jul-2023: Machine Sold (1@gmail.com)', which is circled in blue.

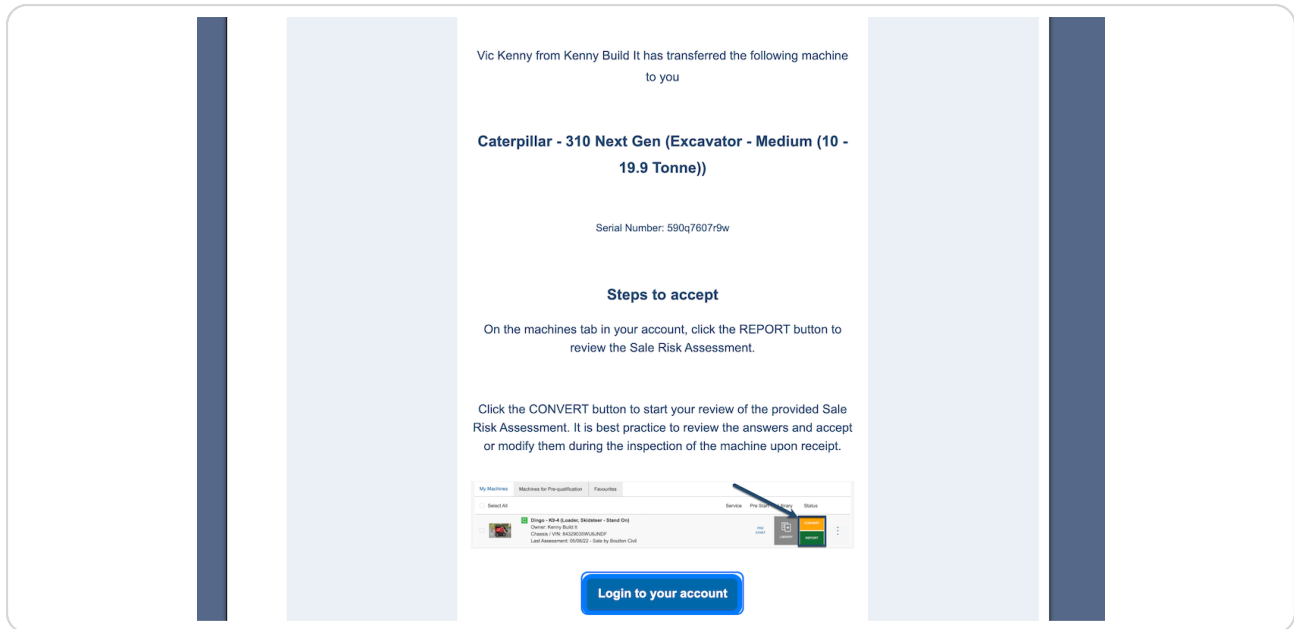
STEP 13

A confirmation email will be sent to you confirming the details of the machine handover.



STEP 14

The recipient will also receive an email confirming that the machine has been transferred to their account.



STEP 15

The machine will now be available in the Buyer's account where they can convert the Sale Risk Assessment to a relevant purpose assessment.

The screenshot displays the 'plant assessor' web application interface. The top navigation bar includes 'MACHINES', 'PEOPLE', 'SITES', 'CONNECTIONS', 'LIBRARY', 'ACTIONS', and 'DASHBOARDS'. The user profile 'Vic Kenny' from 'JD CONSTRUCTION' is visible in the top right. On the left, there is a '+ ADD NEW MACHINE' button, a 'Keyword Search' field, and a 'FILTER BY' section with options for 'SITES', 'OWNERS (2 OF 4 SELECTED)', and 'MACHINES'. The main content area shows a table of machines under the 'Machines for Pre-qualification' tab. The table has columns for 'Service', 'Pre Start', 'Library', and 'Status'. Two machines are listed:

	Service	Pre Start	Library	Status
<input type="checkbox"/>		PRE START	LIBRARY	CONVERT REPORT
<input type="checkbox"/>		PRE START	LIBRARY	CONVERT REPORT

The first machine is a 'Caterpillar - 310 Next Gen (Excavator - Medi...' with owner 'JD Construction', serial number '590Q7607R9W', and last assessment 'Today at 11:55 - Sale by Ke...'. The second machine is a 'Caterpillar - 226B (Loader, Skidsteer - Seat...' with owner 'JD Construction', chassis/VIN '4890576084576098', and last assessment 'Today at 08:13 - Sale by K...'. The 'CONVERT' button in the first row is highlighted with an orange border.

