

☑ How To: Register Fluid Samples in VisionLink

◆ Before You Begin

- You must have Standard or Administrator access.
- You can register samples regardless of asset subscription status.

🔗 Step 1: Start the Registration Process

1. Sign in to VisionLink.
2. Launch the registration screen using one of these options:
 - From Home → click Register Sample
 - From Assets page → find asset → Actions > Register Sample
 - From Asset Details page → Actions > Register Sample or Health > Fluid Analysis > Register Sample
 - From Fluid Analysis (S-O-S Services) → Summary or Track Samples tab → Register Sample

🔍 Step 2: Select Components

1. Search or locate assets/components using:
 - Asset Serial Number, Asset ID, Make, Model, or Component name
 - Or select from My Component Set dropdown (if available)
2. Select:
 - Individual components ☒
 - Or all components using the Asset column checkbox
3. Click Next

Notes:

- Maximum 20 components per submission
- Missing model info will prompt you to select a model
- Shared/rental assets default to "Unknown" model

📄 Step 3: Add Sample Details

General Information

- Select Sample Date (defaults to current date)
- Enter Service Meter value and Units
- Optional:
 - Group
 - Work Order
 - Last Known Location
 - Sampled By

🔧 Component Information

1. Dealer Bottle Number
 - Leave ON if provided by dealer
 - Toggle OFF if not using dealer bottle numbers
2. If ON:
 - Dealer auto-populates
 - Enter Sample Number



⚙️ Enter Fluid & Component Details

For each component:

- Select:
 - Fluid Change
 - Filter Change
 - Fluid Brand
 - Fluid Type (enabled after selecting brand)
 - Fluid Grade (enabled after selecting brand)
- Enter:
 - Meter on Fluid
 - Component Meter + Units
 - Makeup Fluid + Units
 - Label Number
 - Sampling Point
 - Priority
- Optional:
 - Notes

Tips:

- Expand sections or use Expand All for multiple components
- Navigate between assets using:
 - Left panel
 - Next Asset or Go to next asset

✅ Step 4: Submit the Sample

1. Click Submit
2. If required fields are missing (e.g., Fluid Change, Filter Change, Fluid Brand, Fluid Grade):
 - Complete them in the popup
 - Click Submit again

💡 Key Benefits

- Saves time with reusable component sets
- Reduces risk of incorrect or unidentified samples
- Enables full tracking of sample progress through the lab