Equipment Management

Manage maintenance for customer-owned equipment. Gain visibility into equipment under warranty and complete equipment history.

- **Track service contracts and schedules**
- **Easily view equipment maintenance records**
- **Create service contracts with forecasted service dates**
- **Gain insights with drilldown reports and dashboards**
- **Create and track equipment warranty commitments**

Key business benefits

- Gain visibility of your customer's equipment including warranty commitments.

- Schedule maintenance jobs and provide effective problem resolutions.

- Create service contracts for service agreements or equipment maintenance.

- Track warranty classes according to models of equipment.

Related resources

- Why Service-Driven Companies Thrive with Acumatica
  > LEARN MORE

- 10 Ways Service Companies Grow with Acumatica
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- Schedule a Personalized Demo
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Track Customer Equipment and Optimize Customer Service

EQUIPMENT MANAGEMENT EXTENDS ACUMATICA SERVICE MANAGEMENT FOR MAINTENANCE CONTRACTS, WARRANTY, AND REPAIR SERVICES

Equipment management is essential for service-driven organizations that manage maintenance contracts for customer-owned equipment. This is critical for services related to equipment or labor warranties.

The Equipment Management application extends Service Management capabilities to record the history of customer-owned or company-owned equipment. Avoid mischarges and objections by establishing warranty offers for equipment or components. Keep track of serial numbers, define default vendors, and track sale and installation dates for each component.

Maintain complete visibility of your customer's equipment under warranty as well as equipment history. Manage service contracts and schedules for recurring visits to your customers. Prevent needless customer invoicing of parts and labor when the work is covered under warranty. Create field service contracts to associate equipment for preventive maintenance or create schedule rules for recurring service visits to your customers.

Every detail for equipment is maintained in the system and available to field service technicians through the mobile application. Assign appointments to the right resource at the right time, considering the workload, location, needed skills, and certifications Armed with information, technicians can provide faster and higher quality maintenance services for customer equipment.

"With Acumatica, we have a single source of truth that's actionable, which cuts down on errors, cuts down on confusion, and ultimately, makes us more profitable."

–Shel Waggener, President, American Asphalt Repair & Resurfacing

> CUSTOMER STORIES

Repair Scheduling

Schedule and maintain a history of appointments for services performed on equipment items installed at customer facilities.

Component Handling

Define components of equipment items and schedule appointments for regularly scheduled replacements.

Warranty Tracking

Define warranties by equipment and by component. The system will notify the employee and manager as appointments are manually or automatically scheduled.

Preventative Maintenance Contracts

Create recurring schedules for preventive maintenance and fine-tune appointment assignment using calendar boards.

Standardized Billing Contracts

Define a billing period and the allotted amount of service hours or visits permitted in the period. Apply overage charges when allotted services exceed maximum visits or hours for the period.

Side Panels

Use side panels for a quick and comprehensive view of key project data without navigating out of the current window. Easily drill down into relevant details on any record selected with standard prebuilt side panels or build custom side panels for different uses and roles.

Mobile App

Update appointments and equipment items on the road or in the field at customer sites using the mobile application designed for Android and iOS devices. Select the equipment to repair and service, take pictures, access equipment history, review warranty information, use your phone for note dictation, and update the order status directly from your mobile device.

Multi-Language and Localization

Support multiple languages and date and number formats. Define a default language by user for the web and on the mobile app.

Enterprise-Wide Integration

Convert CRM opportunities into service orders and appointments for equipment repair. Stock equipment and component items sold through sales orders can be maintained for on-going equipment management and maintenance. Create recurring service schedules for a project and manage budgets and profitability across and project. Capture employee timecards used for payroll. Manage equipment and replacement part inventory with integrated purchasing, requisitions, and robust replenishment.