

## Track Equipment and Optimize Maintenance and Customer Services with Contract Scheduling

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.

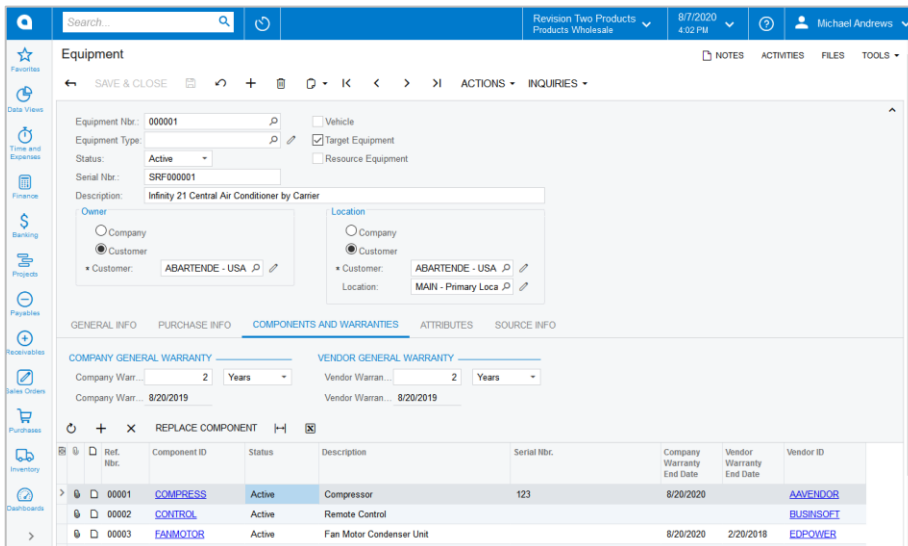
### EQUIPMENT MANAGEMENT EXTENDS ACUMATICA SERVICE MANAGEMENT FOR MAINTENANCE CONTRACTS, WARRANTY, AND REPAIR SERVICES

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.

Every detail for equipment is maintained in the system and available to field service technicians through the mobile application. Armed with information, technicians can provide faster and higher quality maintenance services for customer equipment.

Create field service contracts to associate equipment for preventive maintenance or create schedule rules for recurring service visits to your customers.



The screenshot displays the 'Equipment' form in Acumatica. The top navigation bar includes a search bar, user profile (Michael Andrews), and date/time (8/7/2020 4:02 PM). The left sidebar shows various application modules. The main form area is titled 'Equipment' and contains fields for Equipment Nbr (000001), Equipment Type, Status (Active), Serial Nbr (SRF000001), and Description (Infinity 21 Central Air Conditioner by Carrier). Below these are sections for Owner (Company or Customer) and Location (Company or Customer). The 'Customer' section is expanded, showing 'ABARTENDE - USA' and 'MAIN - Primary Loca'. The bottom section displays 'COMPONENTS AND WARRANTIES' with a table listing components and their warranty details.

Ref. Nbr.	Component ID	Status	Description	Serial Nbr.	Company Warranty End Date	Vendor Warranty End Date	Vendor ID
00001	COMPRESS	Active	Compressor	123	8/20/2020		AAVENDOR
00002	CONTROL	Active	Remote Control				BUSINSOFT
00003	FANMOTOR	Active	Fan Motor Condenser Unit		8/20/2020	2/20/2018	EDPOWER

Gain complete visibility of all installed equipment at customer sites, along with service schedules and warranty commitments.

### KEY BENEFITS

#### IMPROVE CUSTOMER SERVICE

- Gain complete visibility of your customer's equipment items including serial number, setup, history, and warranty commitments
- Identify problem patterns on equipment items to schedule maintenance jobs and provide effective resolutions

#### INCREASE EFFICIENCY

- Create service contracts for service agreements or equipment maintenance with flexible frequencies and forecasted service dates
- Assign appointments to the right resource at the right time, considering the workload, location, needed skills, and certifications

#### ACCELERATE DECISION-MAKING

- Improve decisions by using drill-down reports and dashboards to access past information and gain insights into future needs

#### WARRANTY TRACKING

- Improve customer satisfaction by tracking warranty classes according to models of equipment
- Prevent needless customer invoicing of parts and labor when the work is covered under warranty

## EQUIPMENT MANAGEMENT FEATURES AND CAPABILITIES

<b>Repair Scheduling</b>	Schedule and maintain a history of appointments for services performed on equipment items installed at customer facilities.
<b>Component Handling</b>	Define components of equipment items and schedule appointments for regularly scheduled replacements.
<b>Warranty Tracking</b>	Define warranties by equipment and by component. The system will notify the employee and manager as appointments are manually or automatically scheduled.
<b>Preventative Maintenance Contracts</b>	Create recurring schedules for preventive maintenance and fine-tune appointment assignment using calendar boards.
<b>Standardized Billing Contracts</b>	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.
<b>Mobile App</b>	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.
<b>Multi-Language and Localization</b>	Support multiple languages, date formats, and number formats. Define a default language by user for the web and on the mobile app.
<b>Enterprise-Wide Integration</b>	Convert CRM opportunities into service orders and appointments for equipment repair. Stock equipment and component items sold through the sales order application 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 time for employee timecards used for payroll. Manage equipment and replacement part inventory with integrated purchasing, requisitions, and powerful inventory replenishment logic.