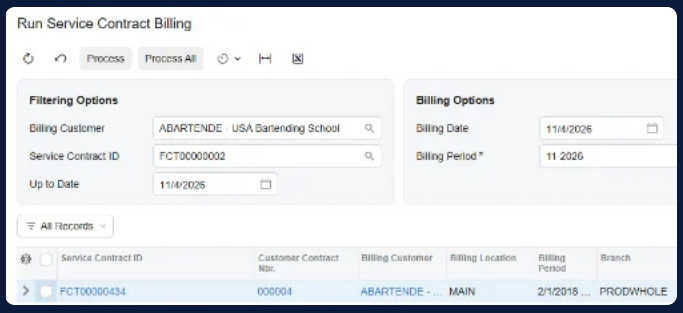
Acumatica
The Cloud ERP

Equipment Management

Extends Field Service Management

Manage maintenance for customer-owned equipment. Gain visibility into equipment under warranty and complete equipment history, with AI-assisted insight and a modern mobile experience for technicians.



Track customer equipment and optimize customer service

Equipment management is essential for service-driven organizations that manage maintenance contracts for customer-owned equipment, especially where equipment or labor warranties apply. The application extends Field Service Management to record the history of customer-owned or company-owned equipment, so every visit starts with the full picture.

Know every piece of equipment

Keep a complete record for each item and component, and ask AI Assistant plain-language questions about it, with answers as text, charts, or tables.

- Track serial numbers, vendors, and installation dates
- Establish warranties by equipment or component to avoid mischarges

Plan service and contracts

Create contracts for preventive maintenance or rules for recurring visits, with dashboards that load faster through Generic Inquiry optimization.

- Prevent invoicing of parts and labor covered by warranty
- Assign the right resource by workload, location, skills, and certifications

Equip technicians in the field

Every equipment detail reaches technicians through the mobile application.

- Use the modernized Service Management app
- Clock in and out from the mobile app

Key business benefits

Gain visibility of your customers' equipment, including warranty commitments, and ask AI Assistant for answers drawn from your own ERP data.

Schedule maintenance jobs and provide effective problem resolutions, with technicians clocking in and out from the mobile app.

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

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10 Ways Service Companies Grow with Acumatica

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> "We use Acumatica as our single source of truth. It connects our project management, field service, manufacturing, and accounting departments to remove silos and allows users to connect with real-time data to help ensure the business continues to run smoothly."
>
> – Josh Higgins, Business Application Specialist, Storm Smart

> CUSTOMER STORIES

Capabilities

Schedule, contract, warrant, and service customer equipment from the office to the field.

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 notifies 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 service hours or visits permitted in the period. Apply overage charges when allotted services exceed the maximum.

Side Panels and Reporting

Use side panels for a quick view of key data without leaving the current window, and drill into any record. Optimized Generic Inquiries and AI Assistant dashboard widgets keep equipment reports fast.

Mobile App

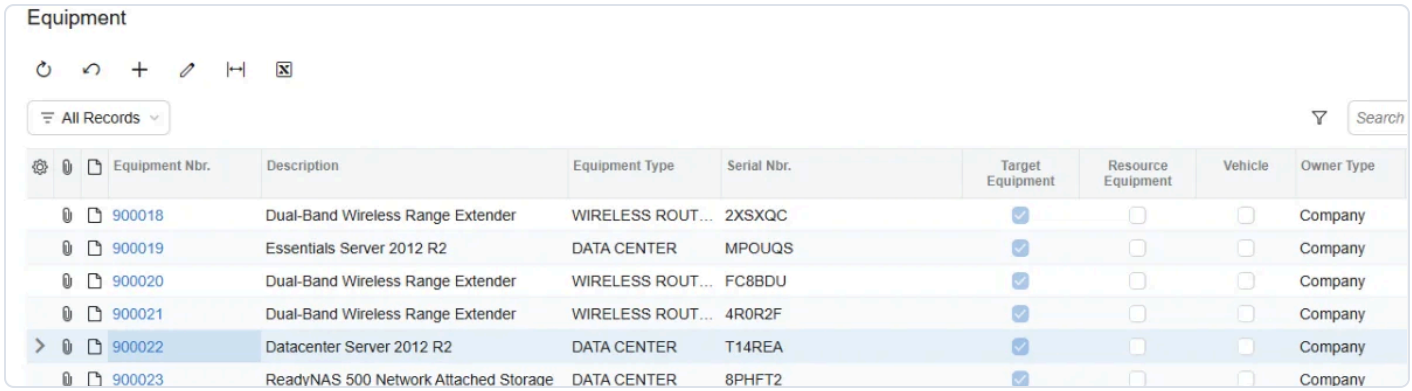
Update appointments and equipment on the road using the Android and iOS app: select equipment, take pictures, access history, review warranty information, dictate notes, update order status, and clock in and out.

Multi-Language and Localization

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

Enterprise-Wide Integration

Convert CRM opportunities into service orders, with AI-assisted sentiment and priority on cases. Maintain equipment sold through sales orders, manage budgets across projects with equipment time cards costed to the project branch, and manage parts with integrated purchasing and replenishment.



ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit **www.acumatica.com** or follow us on **LinkedIn**.

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