

# Equipment Management

## Manage Equipment Sales, Rentals, Purchases, Maintenance and More

Proper management of company owned equipment, vehicles and other assets is critical for businesses in the construction and field service industries. Equipment Management is a complete solution that allows users to access up-to-the minute asset-level financials and to track status, location and utilization of rental equipment. It's a powerful tool designed to improve efficiencies, increase profitability and maximize the effectiveness of equipment-centric operations.

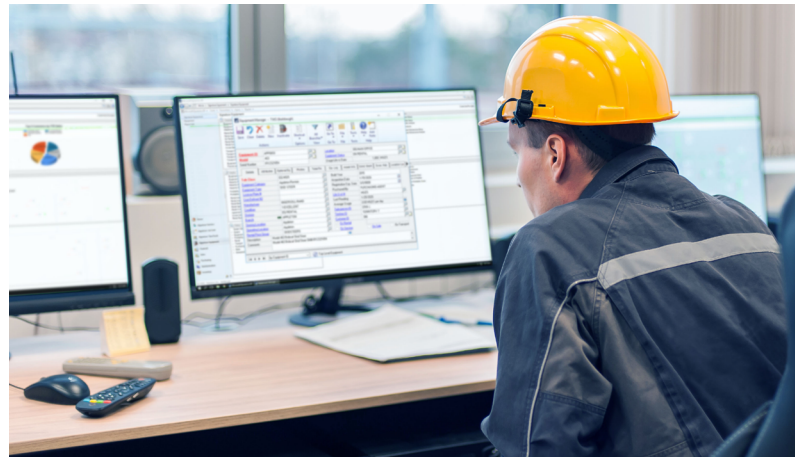
### In the business of renting equipment?

Equipment Rental is an optional add-on module that offers a streamlined approach to supporting a rental process, allowing you to record all details involved. Equipment Rental allows management of all aspects of equipment rentals including:

- Availability and search
- Bookings
- Rental agreements
- Transport to/from a customer location
- On and off rental service tasking with visual inspection and image-based markup
- Repair and scheduled maintenance
- Periodic invoicing over the life of a longer-term rental agreement
- Flexible billing increments
- Ability to invoice miscellaneous sales items as well as overages
- Special pricing and advanced rental options for each customer or group
- Manage equipment by equipment model, type, branch or division
- Transfers of equipment between branch, location, operating location, owning location or division
- Transfer attachments between equipment

Equipment Rental is flexible – you can configure pricing by model, set up your own frequencies/schedules, and calculate line-item discounts, commissions, stand downs and more.

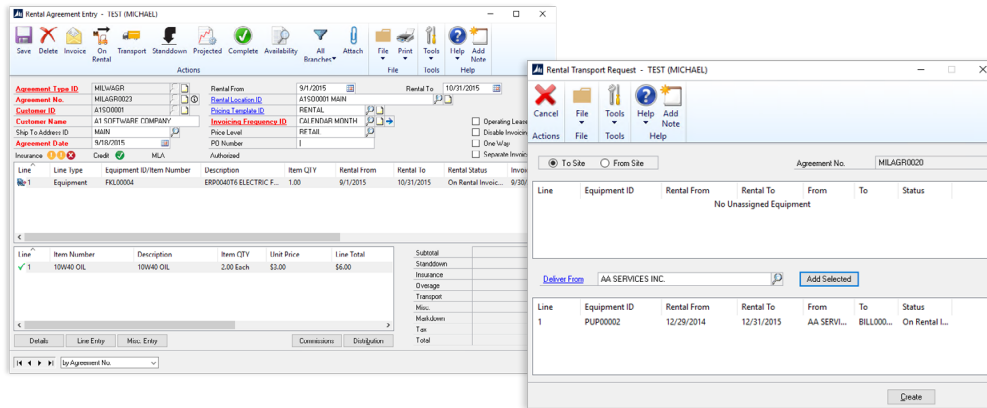
Tax and insurance amounts are automatically calculated, and rentals can be integrated with Equipment Transport to manage charges related to equipment deliveries.



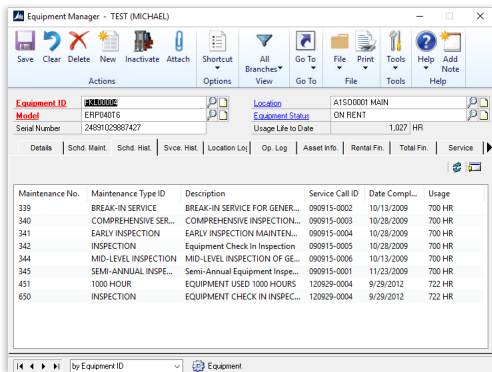
### Equipment Management Features:

- Record equipment details and attributes
- Create and manage bookings (reservations) for equipment rentals, rental agreements for equipment and optional accessories
- Track current status and location of equipment
- View financial profiles by equipment (service, sales and rental)
- Use MobileTech to inspect equipment before and after rental, using image mark to identify rental damage or needed repairs
- Log equipment usage and other measurements or readings
- View service performed and related costs through Service Management
- Keep track of parent-child equipment relationships using the asset hierarchy
- Define and track unique equipment attributes
- View customer history and initiate new call, rental, lease, or sale transactions from customer center
- View or find equipment data for a branch or customer location and Initiate leases or sales of equipment
- Rent equipment to a job

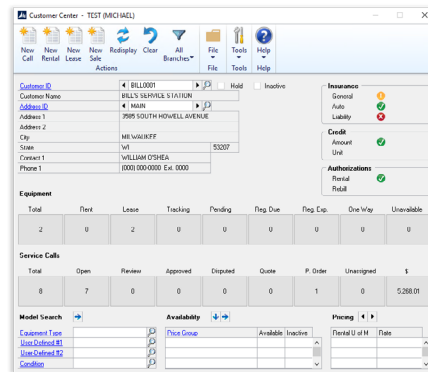
# Optimize Your Assets



Create rental agreements based on equipment availability.



Equipment Manager allows you to view all financial, service, and rental information for a specific piece of equipment.



The Customer Center allows users to view all activity for a specific customer.

## Tailor your solution with additional functionality

### Scheduled Maintenance

Create preventive maintenance plans to ensure equipment is serviced in a timely manner. You'll be able to maximize availability by reducing downtime and the potential for lost revenue or utilization. Utilizing Service Management's tasking and task list capabilities, the ability to provide extensive task descriptions, notes and predefined task materials ensures that technicians are best equipped to successfully service equipment. A predictive maintenance feature adds the ability to forecast when the next maintenance may be due based on metered usage of the equipment, a predefined time frame or a combination of both.

### Equipment Purchasing

Similar to Microsoft Dynamics GP Purchase Order Processing, but takes it a step further. When a new piece of equipment is ordered, the user can choose whether it's intended for resale or use. Items marked as capital items on the purchase order are automatically linked to fixed assets. Once the equipment record is completed in fixed assets, it's automatically linked to Equipment Management. Asset information, including acquisition cost, depreciation and current book value is visible within the equipment record.

*"I'm uploading photos, all purchase information, warranty information. It's all right there. I love it."*

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### Equipment Transport

Facilitates the booking, scheduling and invoicing of the delivery and pickup of equipment. Any equipment booked as a rental can have the transport charges billed as part of the rental process. Income and expenses can also be tracked against vehicles in order to determine profitability.

### Equipment Sales

Process transactions and store information related to equipment sales. Working with profitability analysis, you can view costs relating to a piece of equipment to determine the best-selling price.

### Tire, Brake and Fuel Tracking

Record and invoice tire, brake wear and fuel consumption during the equipment rental period. Vehicle readings can be entered directly into the operations log or captured in the field using MobileTech. Excessive wear or consumption can be invoiced within the rental agreement.

- Housley Communications