

Customer Profile: Manage Equipment

The **Equipment Tab** of the [Customer's Profile](#) contains a listing of all the equipment/hardware that the customer has purchased from you or any equipment from third-party vendors that you track and/or service.

Aside from inventory purposes, the Equipment tab of the client's Address Book is also used to document and keep the service records for each of the equipment.

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ABC Company

Tags: Assign

COO

Collection

Do not call

Geofence

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number: 12345

8330 Lovers Ln
Phillips, WI 54555

400 S 4th St., Suite 1000M
Minneapolis, MN 55415
Contract Expiration Date: 07/30/2024

Awaiting Payments
\$ 5198.03

Invoice overdue
\$ 0.00

Pending Quotes
\$ 677.50

Location

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Filter:

Location: Not Selected

Parts

Equipment

CLEAR FILTER

+ ADD NEW EQUIPMENT

Name	Manufacturer	Model	Serial Number	Install Warranty	Location	Notes
Rtu	Carrier	ABC			ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Test equipment note
Compound Pressure Gauge	Wika	9831538			3rd location - 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911, United States	
Test	Raz	1234	1234		ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Noted for equipment, change filter. Equipment more test 8:25
AC condenser	AC condenser	AC condenser	04	04/01/2025	ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	

The equipment details that are shown on the listing are the type and model, the manufacturer, serial number, warranty details, service location, and notes. Click on the table header to **Sort** the list alphabetically according to the selected header.

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Use the **Filter Bar** to quickly find equipment.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

← BACK ABC Company Tags: Assign COB Collection Do not call Geofence EDIT CONTACT

Contact Info: Customer Number: 12345, Contact name: John Wilson, Phone: (612) 746-4017, Email: sales@industack.com
Billing Address: 8330 Lovers Ln, Phillips, WI 54555
Service Location: 400 S 4th St., Suite 1000M, Minneapolis, MN 55415, Contract Expiration Date: 07/30/2024

Awaiting Payments: \$ 5198.03, Invoice overdue: \$ 0.00, Pending Quotes: \$ 677.50

Location Estimates Jobs Invoices **Equipment** Reminders Notes Attachments Geofences Messaging Contracts

Filter: Location: Not Selected ▾ Parts Equipment CLEAR FILTER + ADD NEW EQUIPMENT

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If your client has multiple Service Locations, use the Location filter to view the equipment list according to location.

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You can also filter and view the list according to either equipment or part. And to further narrow down the list, use the location filter together with these.

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Use the **Clear Filter** button to remove the filter settings.

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Use the **Add New Equipment** button to add one to the client's profile.

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