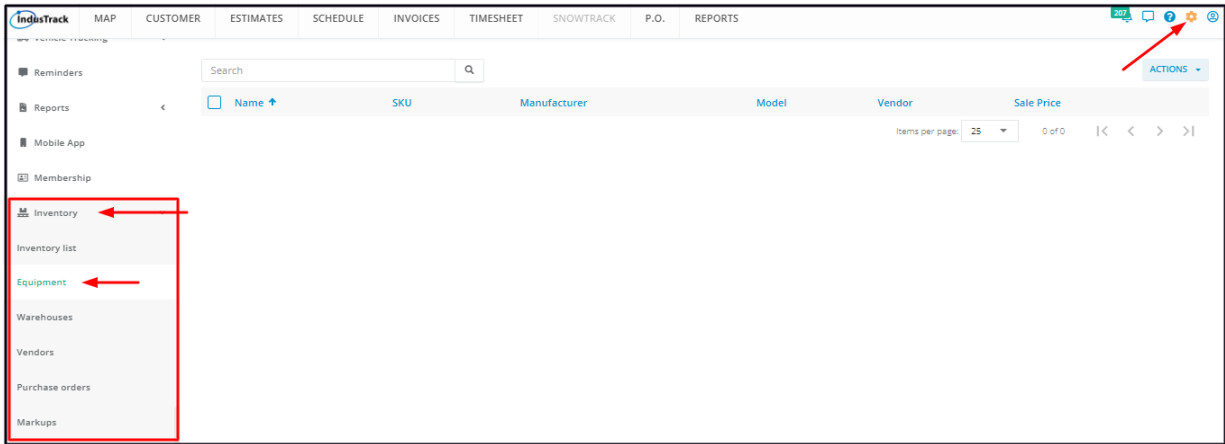


Equipment

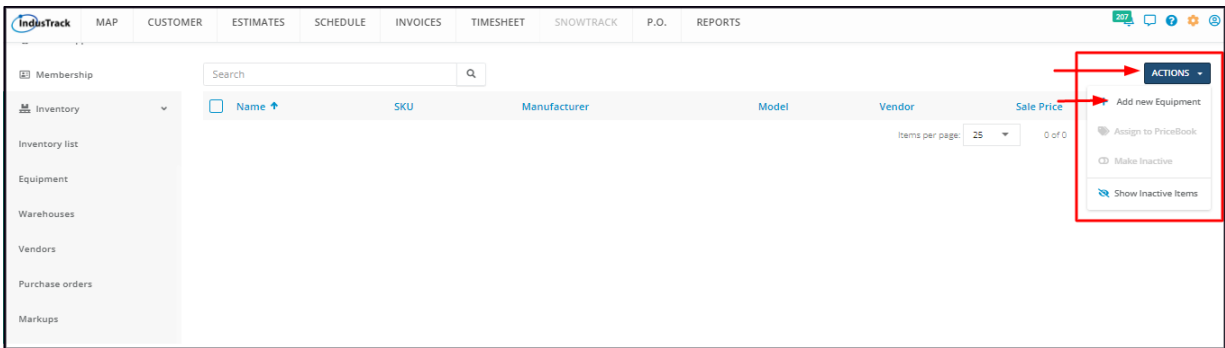
Equipment is a long term-asset that benefits companies or businesses over several years. If you supply or sell equipment, IndusTrack helps you keep track of these items the same way that it does your inventory.

To add and manage your equipment inventory records, go to **Settings > Inventory > Equipment**.

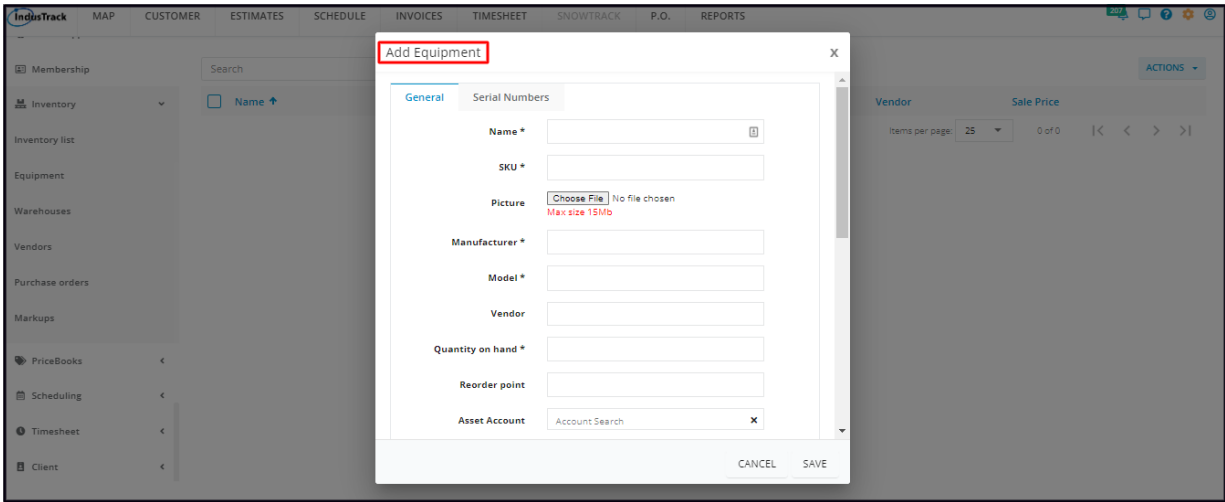


Set Up a New Equipment Record

From the Equipment page, click on the **Actions** button and select **+ Add new Equipment**.



Fill in the item details on the **Add Equipment** window. Fields with (*) are required.



Alternatively, equipment record set-up can also be accessed from the Inventory List page. Go to **Settings > Inventory > Inventory List**. From the Actions button, select **Add New Equipment**. The same Add Equipment window will come up. When the new equipment record is saved, this is added to the Equipment List.

Name	Sku	Type	Sales Description	Sales Price	Cost
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15
#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4
3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75
ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11
Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central airconditioning units.	135	65
Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318
Is2 helmet		Inventory	Protect your Head	500	400
Tuff Declogger 1G	IS - 3000	Non-inventory	Declogger for use the ACU service teams.	265	15

General Information

Name*

- Key in the name of the equipment.

Add Equipment

General

Name * Power Generator 25 KVA

SKU *

Picture No file chosen
Max size 15Mb

Manufacturer *

Model *

Vendor

Quantity on hand *

Reorder point

Asset Account

Non taxable ☐

CANCEL SAVE

SKU*

- Key in the item's assigned equipment code.

Add Equipment

General

Name * Power Generator 25 KVA

SKU * EQ 8000

Picture No file chosen
Max size 15Mb

Manufacturer *

Model *

Vendor

Quantity on hand *

Reorder point

Asset Account

Non taxable ☐

CANCEL SAVE

Picture

Optionally upload an image of the equipment. The maximum file size that can be uploaded is 15Mb.

- Click **Choose File**.

- Select and upload the image from your device.

Manufacturer*

- Key in the maker or producer of the equipment

Model*

- Enter the equipment's Model Number/Code.

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

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PriceBooks <

Scheduling <

Timesheet <

Client <

Integrations <

Add Equipment

genset.png

Manufacturer * Himatsu

Model * JHK-30FR

Vendor

Quantity on hand *

Reorder point

Asset Account Account Search

Non taxable ☐

Sales price/rate

Sales description

CANCEL SAVE

Vendor Sale Price

Items per page: 25 0 of 0 |< < > >|

Vendor

- Select the supplier/distributor from the drop-down list.
- If the supplier is not on the list, key in the name. This will be added to the vendor list when the item is saved.

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

Membership Search

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Inventory list

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Markups

PriceBooks <

Scheduling <

Timesheet <

Client <

Integrations <

Add Equipment

genset.png

Manufacturer * Himatsu

Model * JHK-30FR

Vendor Himatsu

Quantity on hand *

Reorder point

Asset Account Account Search

Non taxable ☐

Sales price/rate

Sales description

CANCEL SAVE

Vendor Sale Price

Items per page: 25 0 of 0 |< < > >|

Quantity on Hand*

- Key in the stocks on hand. This will now be your beginning inventory at the **Main Warehouse**.
 - Equipment Inventory can also be monitored using serial numbers. See the section *Serial Numbers* below to learn how this works.
- This is a required field so if there is no quantity on hand, use 0.

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

Membership Search

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Markups

PriceBooks <

Scheduling <

Timesheet <

Client <

Integrations <

Add Equipment

genset.png

Manufacturer * Himatsu

Model * JHK-30FR

Vendor Himatsu

Quantity on hand * 3.00

Reorder point

Asset Account Account Search

Non taxable ☐

Sales price/rate

CANCEL SAVE

Vendor Sale Price

Items per page: 25 0 of 0 |< < > >|

Once the equipment record is saved and the stock location information is already available, or if applicable, open the item details in edit mode and enter the **Bin #** and/or **Isle #**. Until then, the placeholder for warehouse inventory remains disabled. However, if the inventory using Serial Numbers option is used, this warehouse inventory will remain disabled and will no longer be used.

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

Membership Search

Inventory ☐ Name ↑

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Integrations <

Add Equipment

Sales price/rate

Sales description

Income Account Account Search X

Cost

Purchasing description

Expense Account Account Search X

Warehouse	Bin #	Isle #	QTY
Total quantity:			0

CANCEL SAVE

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

Membership Search

Inventory ☐ Name ↑

Inventory list

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Edit Equipment

Sales price/rate 550

Sales description 25kva diesel generator with Perkin engine. Single phase.

Income Account Owners Equity X

Cost 425

Purchasing description Order lead time: > 5 units, 45 days

Expense Account Cost of Goods Sold X

Warehouse	Bin #	Isle #	QTY
Main warehouse			3
Total quantity:			3

CANCEL SAVE

Reorder Point

- Set the minimum quantity for reordering the equipment.

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

Membership Search

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Integrations <

Add Equipment

Manufacturer * Himatsu

Model * JHK-30FR

Vendor Himatsu

Quantity on hand * 3.00

Reorder point 1.00

Asset Account Account Search X

Non taxable ☐

Sales price/rate

Sales description

Income Account Account Search X

CANCEL SAVE

Asset Account

- Select the corresponding asset account from the dropdown list.
 - Scroll down the list to find the correct account name. OR
 - Key in the account name on the search field to quickly find the correct one.

- If the equipment name is not on the list, key in on the field. This will be added to the list when the item is saved.

Non taxable

- If the equipment is not taxable, tick the checkbox. But if it is, leave the checkbox empty.

Sales price/rate

- Key in the selling price of a single unit of equipment. This is the price quoted to customers.

Sales Description

- Key in a short description of the equipment.

The screenshot shows the 'Add Equipment' form in the IndusTrack application. The form is titled 'Add Equipment' and has a 'Non taxable' checkbox. The 'Sales price/rate' is set to 585.00. The 'Sales description' field is highlighted with a red box and contains the text '25kva diesel generator with Perkin engine. Single phase.' The 'Income Account' field is set to 'Account Search'. The 'Cost' field is empty. The 'Purchasing description' field is empty. The 'Expense Account' field is set to 'Account Search'. At the bottom, there is a table with columns 'Warehouse', 'Bin #', 'Isle #', and 'QTY'. The 'Total quantity' is 0. The form has 'CANCEL' and 'SAVE' buttons at the bottom right.

Income Account

- Select the corresponding income statement account from the dropdown list.
 - Scroll down the list to find the correct account name. OR
 - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.

The screenshot shows the 'Add Equipment' form in the IndusTrack application. The 'Income Account' dropdown menu is open, showing a list of accounts including 'Accounts Receivable', 'Undeposited Funds', 'Inventory Asset', 'Construction in Progress', and 'Retainage Receivable'. The 'Income Account' field is highlighted with a red box. The 'Sales price/rate' is 585.00. The 'Sales description' is '25kva diesel generator with Perkin engine. Single phase.' The 'Cost' field is empty. The 'Purchasing description' field is empty. The 'Expense Account' field is set to 'Account Search'. At the bottom, there is a table with columns 'Warehouse', 'Bin #', 'Isle #', and 'QTY'. The 'Total quantity' is 0. The form has 'CANCEL' and 'SAVE' buttons at the bottom right.

Cost

- Key in the acquisition cost of a single unit of equipment.

The screenshot shows the 'Add Equipment' form in the IndusTrack application. The 'Cost' field is highlighted with a red box and contains the value '425.00'. The 'Sales price/rate' is 585.00. The 'Sales description' is '25kva diesel generator with Perkin engine. Single phase.' The 'Income Account' is set to 'Owners Equity'. The 'Purchasing description' field is empty. The 'Expense Account' field is set to 'Account Search'. At the bottom, there is a table with columns 'Warehouse', 'Bin #', 'Isle #', and 'QTY'. The 'Total quantity' is 0. The form has 'CANCEL' and 'SAVE' buttons at the bottom right.

Purchasing Description

- Key in any special purchasing notes, if any, such as required order lead time.

The screenshot shows the 'Add Equipment' form in the IndusTrack software. The form is divided into several sections. The 'Purchasing description' field is highlighted with a red box and contains the text 'Order lead time: > 5 units, 45 days'. Other fields include 'Sales price/rate' (585.00), 'Sales description' (25kva diesel generator with Perkin engine. Single phase.), 'Income Account' (Owners Equity), 'Cost' (425.00), and 'Expense Account' (Account Search). The form also includes a table for 'Warehouse' with columns 'Bin #', 'Isle #', and 'QTY', and a 'Total quantity' field set to 0. The background shows the IndusTrack interface with various menu options like MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, SNOWTRACK, P.O., and REPORTS.

Expense Account

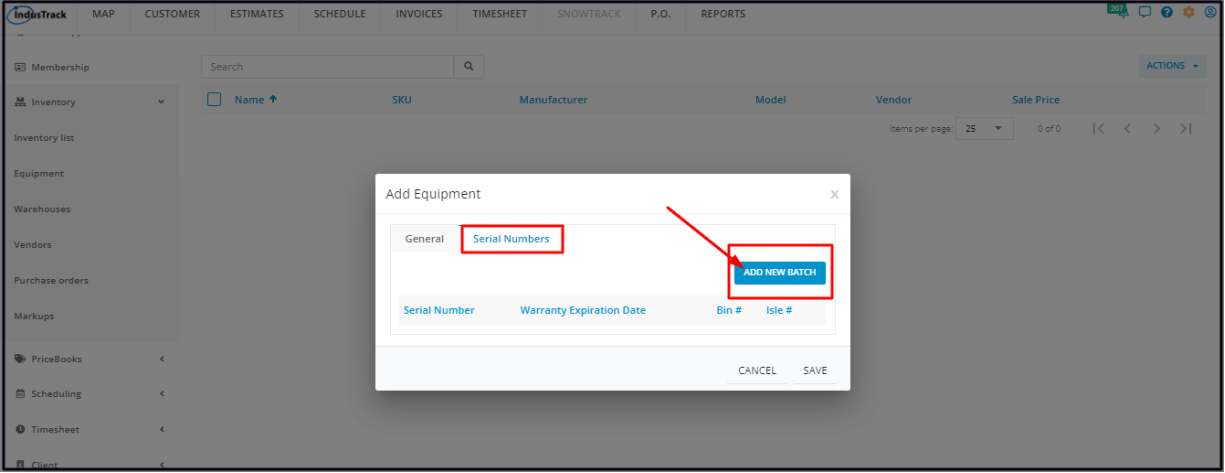
- Select the corresponding expense account from the dropdown list.
 - Scroll down the list to find the correct account name. OR
 - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.

The screenshot shows the 'Add Equipment' form in the IndusTrack software. The 'Expense Account' dropdown menu is open, showing a list of accounts including 'Account Search', 'Owners Draw', 'Owners Equity', 'Construction Income', 'Cost of Goods Sold', 'Blueprints and Reproduction', and 'Bond Expense'. A red arrow points to the 'Account Search' field in the dropdown. The background shows the IndusTrack interface with various menu options like MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, SNOWTRACK, P.O., and REPORTS.

Serial Numbers

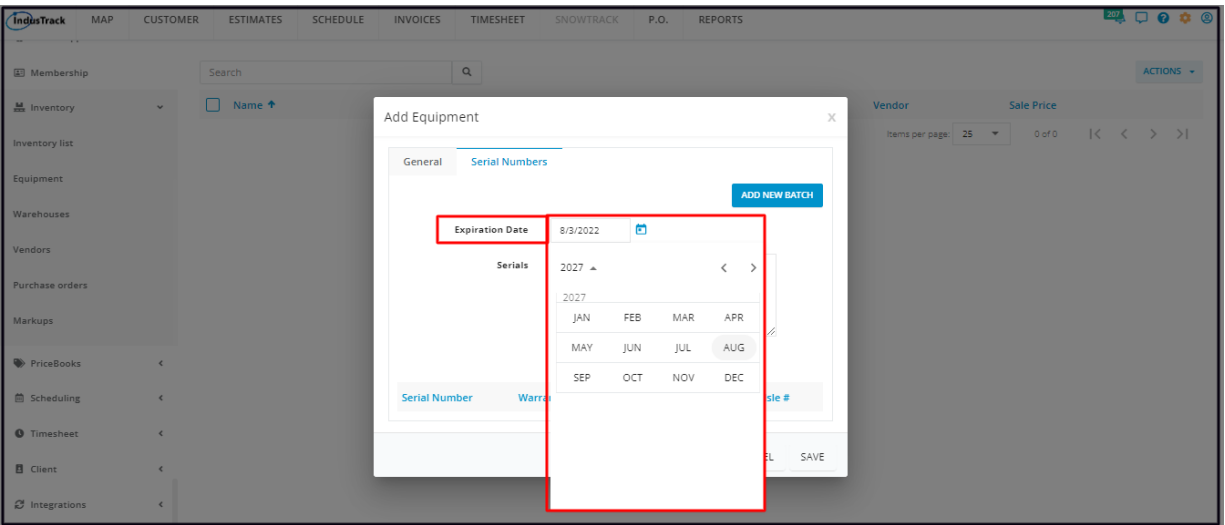
Recording the individual equipment serial numbers into the system is not mandatory. However, it is a good business practice to do so. Using this option will override the Quantity on Hand recorded on the General tab if any.

On the **Serial Numbers** tab, click the **Add New Batch** button.



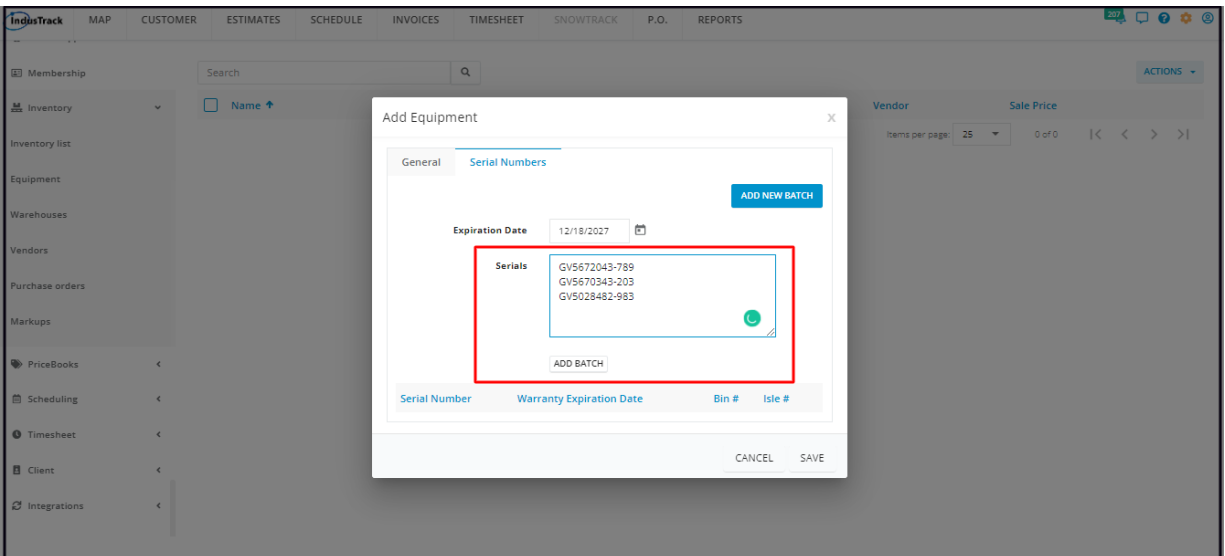
Expiration Date

- Set the expiration date of the equipment, if applicable. Use the date picker or key in the date on the field.
 - If the equipment serial numbers have different expiration dates, enter these individually.



Serials

- Key in the serial number or numbers of the equipment at the Main Warehouse.
 - For multiple expiration dates, enter these and the serial numbers separately.



- Click **Add Batch** to save the serial number(s) and expiration number.

IndusTrack

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Name

ADD NEW BATCH

Expiration Date

12/18/2027

Serials

GV5672043-789
GV5670343-203
GV5028482-983

ADD BATCH

Serial Number	Warranty Expiration Date	Bin #	Isle #
GV5672043-789	12/18/2027		
GV5670343-203	12/18/2027		
GV5028482-983	12/18/2027		

CANCEL SAVE

Vendor

Sale Price

Items per page: 25 0 of 0

- From the General tab, the Quantity on Hand will be updated:
 - The heading will now read Initial Quantity on Hand
 - The quantity field will be disabled. Editing of the value will no longer be allowed.
 - A note will be added that the item has Serial Numbers recorded in the system.

Initial quantity on hand

3

This item has serial number(s) in the system.

- If the stock location information is already available, or if applicable, enter the **Bin #** and/or **Isle #**.

IndusTrack

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Search

Name

ADD NEW BATCH

Expiration Date

12/18/2027

Serials

GV5672043-789
GV5670343-203
GV5028482-983

ADD BATCH

Serial Number	Warranty Expiration Date	Bin #	Isle #
GV5672043-789	12/18/2027		
GV5670343-203	12/18/2027		
GV5028482-983	12/18/2027		

CANCEL SAVE

Vendor

Sale Price

Items per page: 25 0 of 0

Save the new equipment record. This will be added to the Equipment List.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

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ACTIONS

☐

Name

SKU

Manufacturer

Model

Vendor

Sale Price

☐

Power Generator 25 KVA

SQ 8000

Himatsu

JHK-30FR

Himatsu

\$585.00

Items per page: 25

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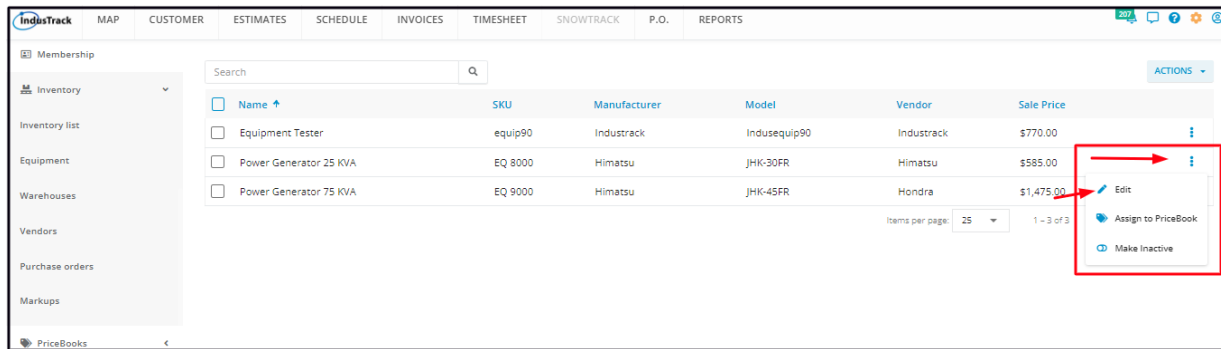
<<

>>

Update the Equipment Details

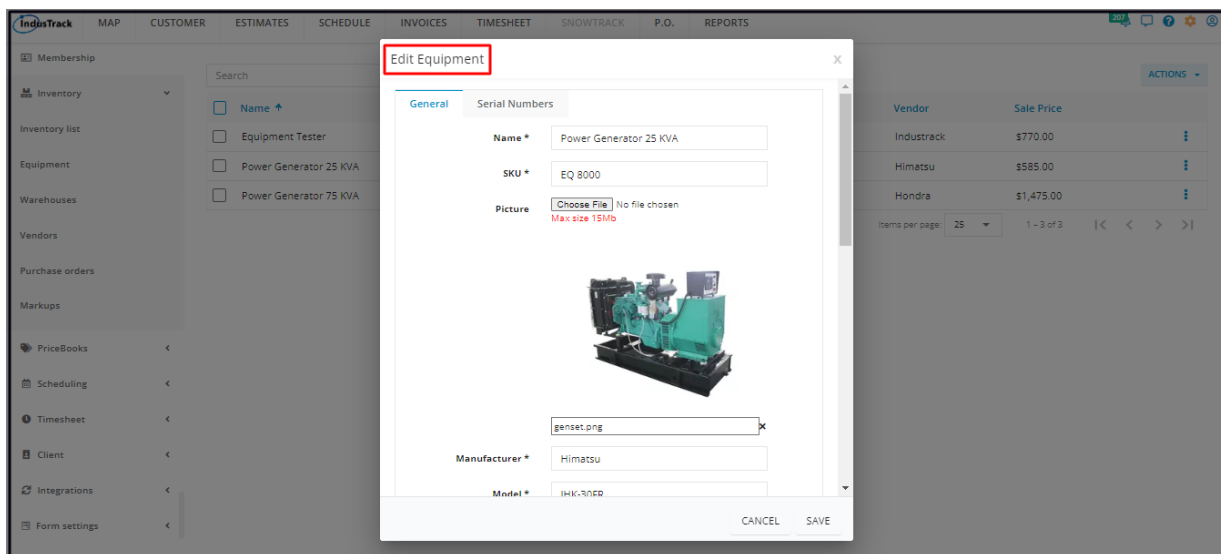
Find the equipment record to be updated from the list. Click anywhere on the row and the record will open in edit mode.

- Alternatively, go to the 3-dot menu to the right of the equipment record and select **Edit**.



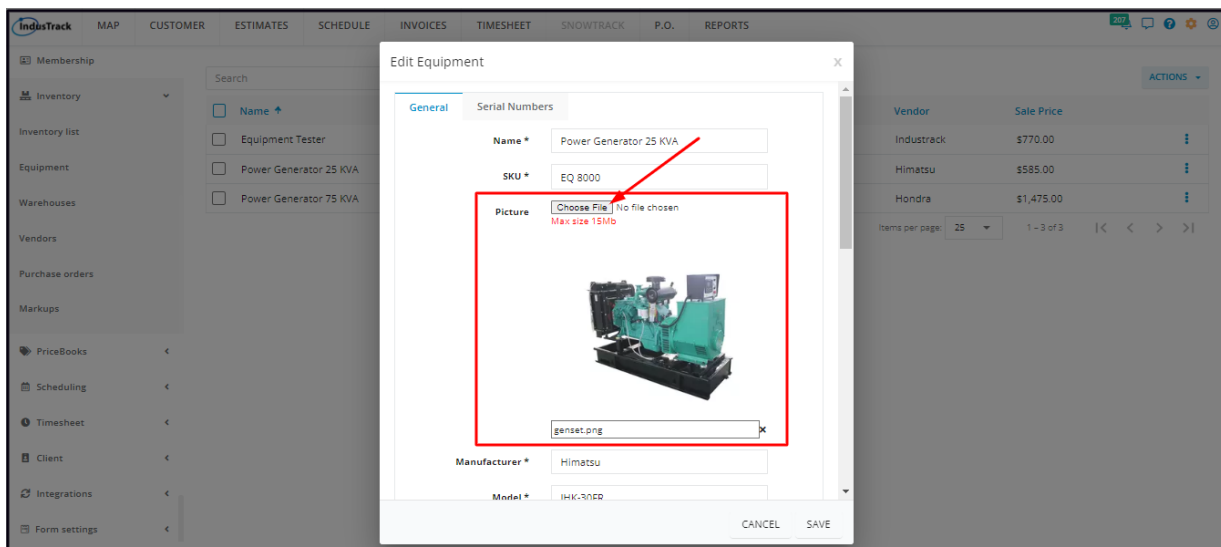
Edit/Update as may be needed. Once done, **Save** the changes.

- An inactive equipment record is not editable. This will have to be reactivated first.

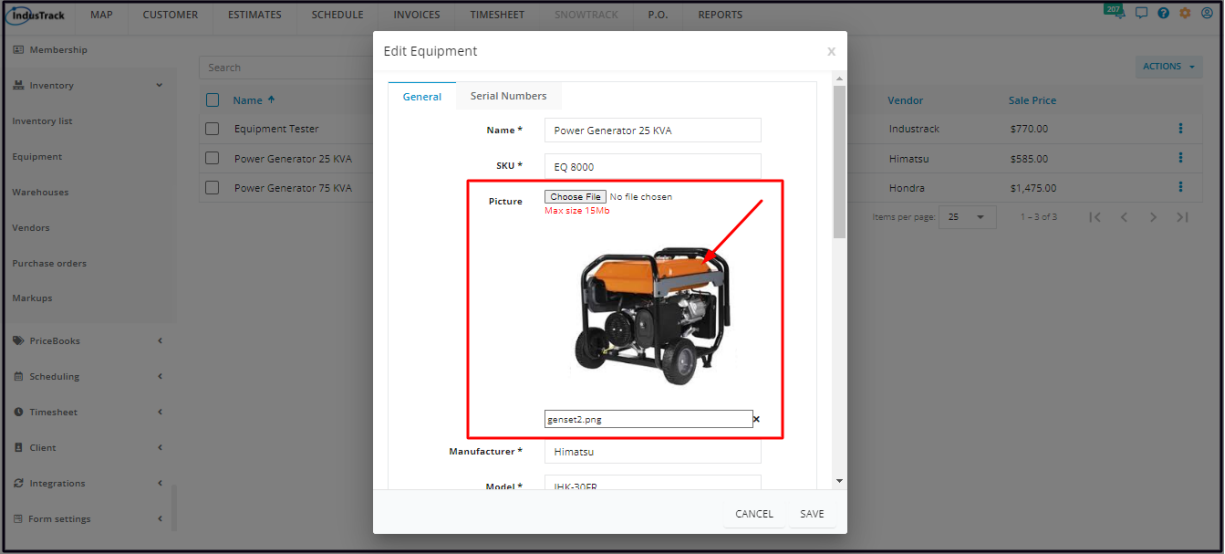


Change the Equipment Image

- From the Picture field, click **Choose File**.

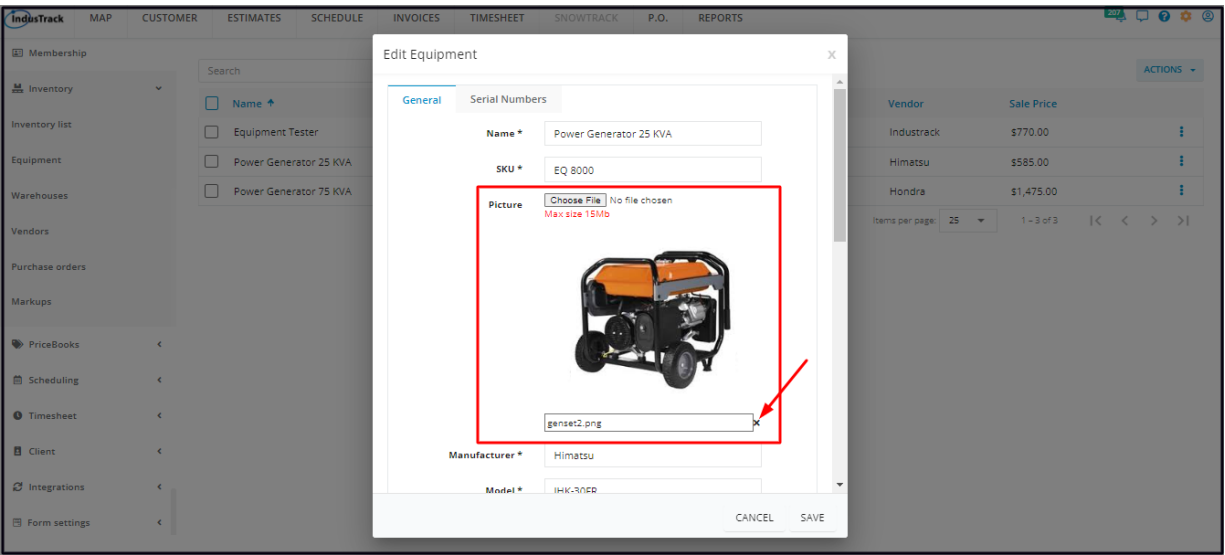


- Select the new image from your device. This will replace the current image. Save the changes.



Delete the Equipment Image

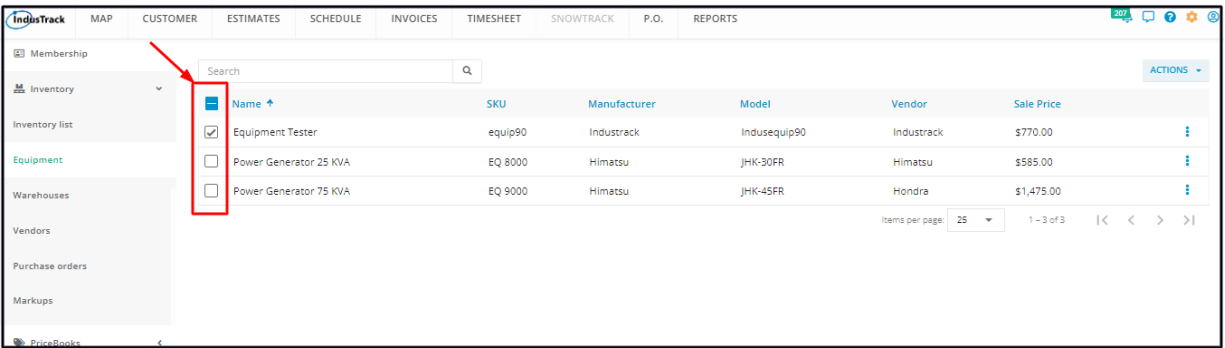
- Click the **delete icon (x)** to the right of the image name. This will remove the image from the window.
- Save the changes.



Deactivate an Equipment Record

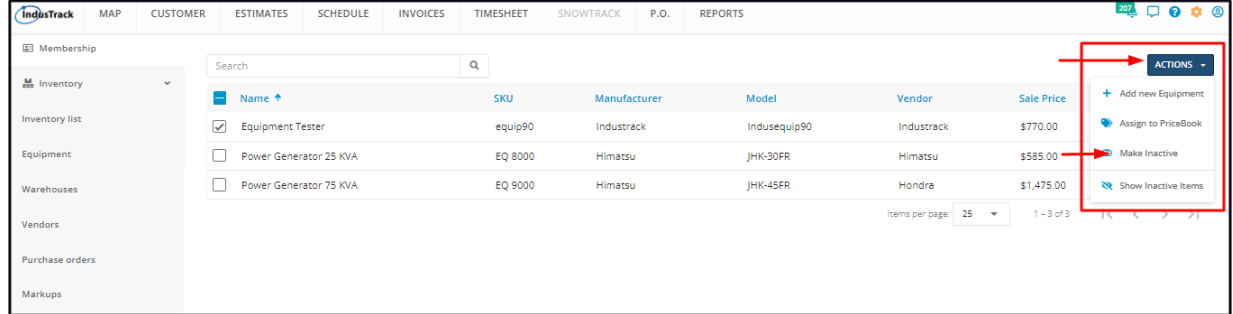
Deactivate an equipment record if the item will no longer be held in inventory. This is an option to take instead of deleting the record which could cause errors.

Find the equipment record to be deactivated from the list and tick the checkbox to its left.

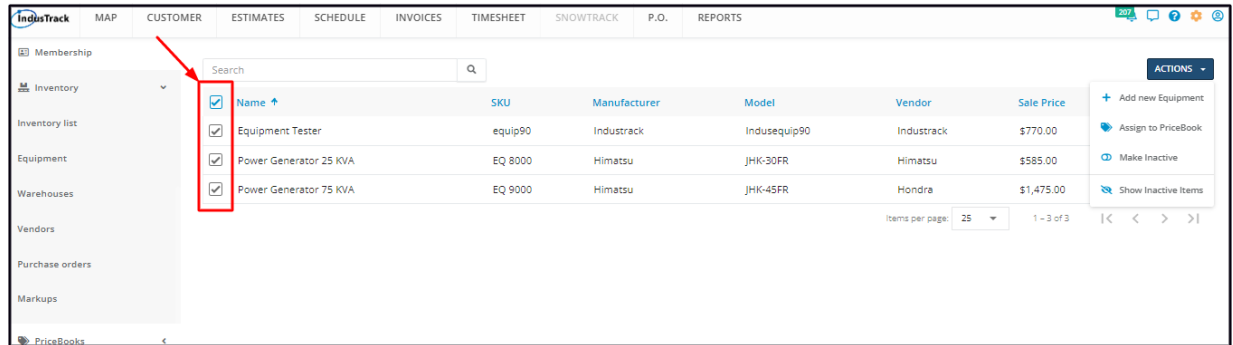


Go to the **Actions** button and select **Make Inactive**.

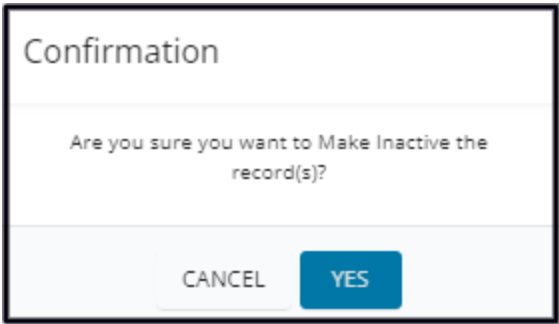
- Alternatively, go to the **3-dot menu** to the right of the record and select **Make Inactive**.



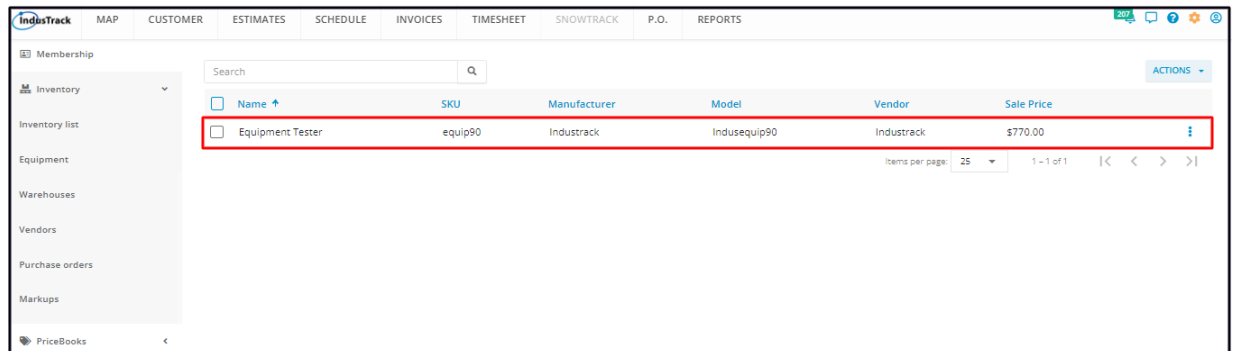
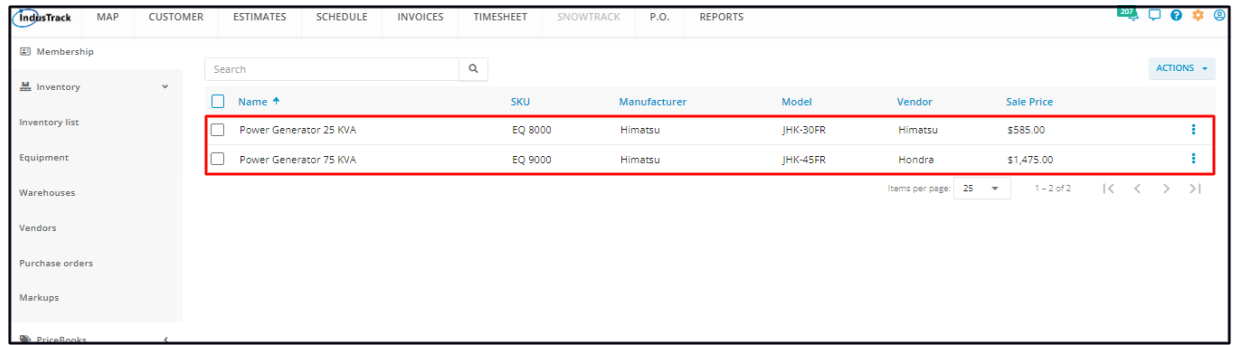
- To deactivate multiple equipment records, tick the checkboxes to the left of all. If all records will be deactivated, just tick the checkbox of the **Name** header. And then go to the **Actions** button and select **Make Inactive**.



A warning window will come up. Click the **Yes** button to continue with the deactivation and **Cancel** to abandon the action.



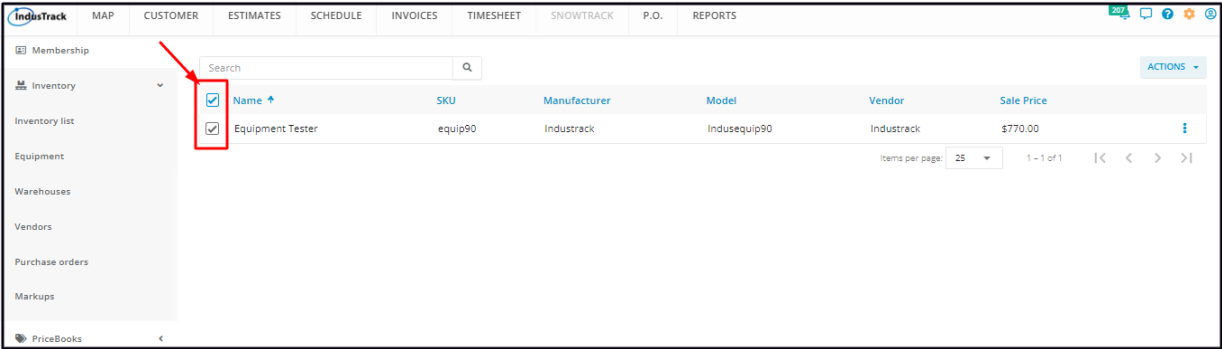
The record will be removed from the **Active List** and moved to the **Inactive List**.



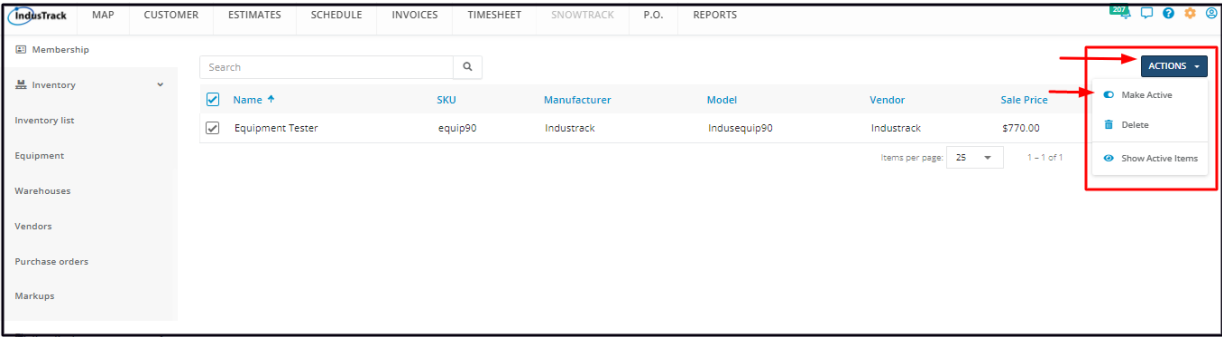
Reactivate a Deactivated Equipment Record

Go to the **Inactive Equipment List**.

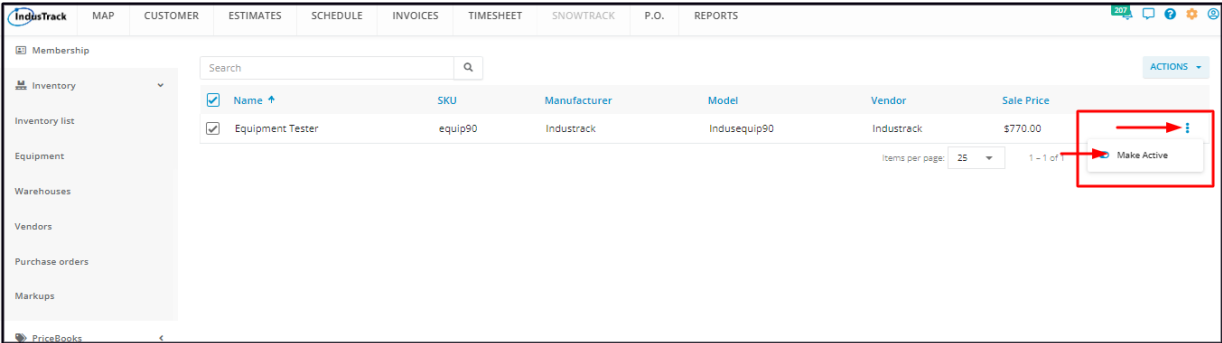
Find the equipment record to be reactivated from the list and tick the checkbox to its left.



Click the **Actions** button and select **Make Active**.

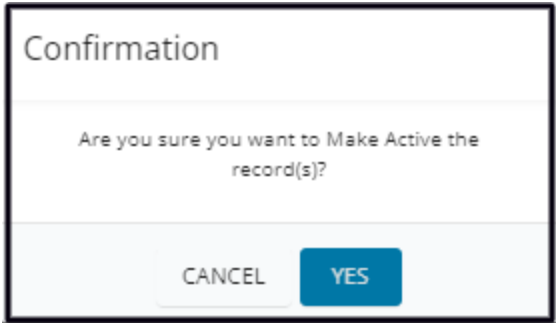


- Alternatively, go to the **3-dot menu** to the right of the record and select **Make Active**.

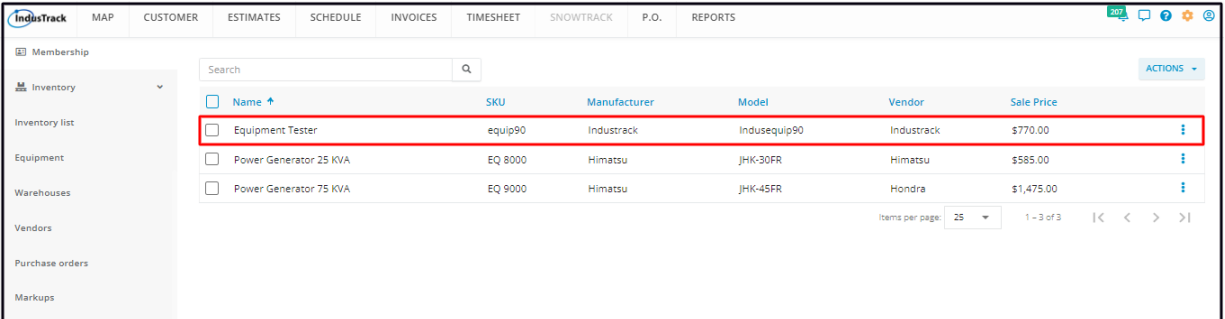
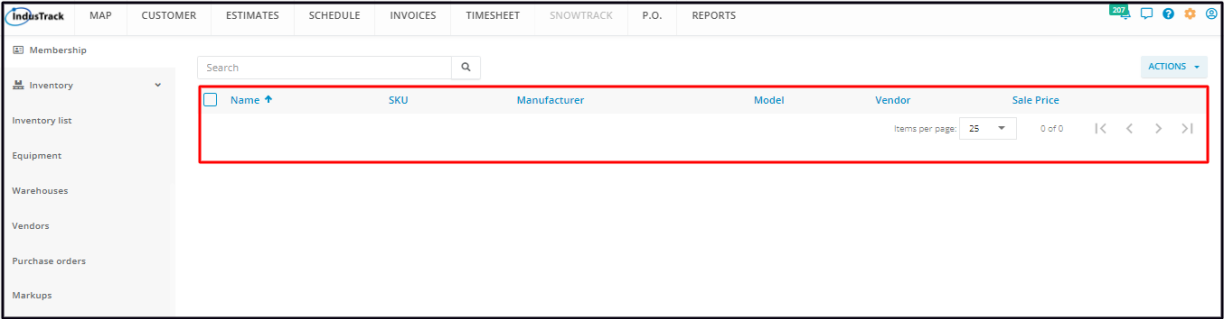


- To reactivate multiple equipment records, tick the checkboxes to the left of all. If all items will be reactivated, just tick the checkbox of the Name header.
- Go to the **Actions** button and select **Make Active**.

A warning window will come up. Click the **Yes** button to continue with the reactivation and **Cancel** to abandon the action.



The item will be removed from the **Inactive List** and moved to the **Active List**.



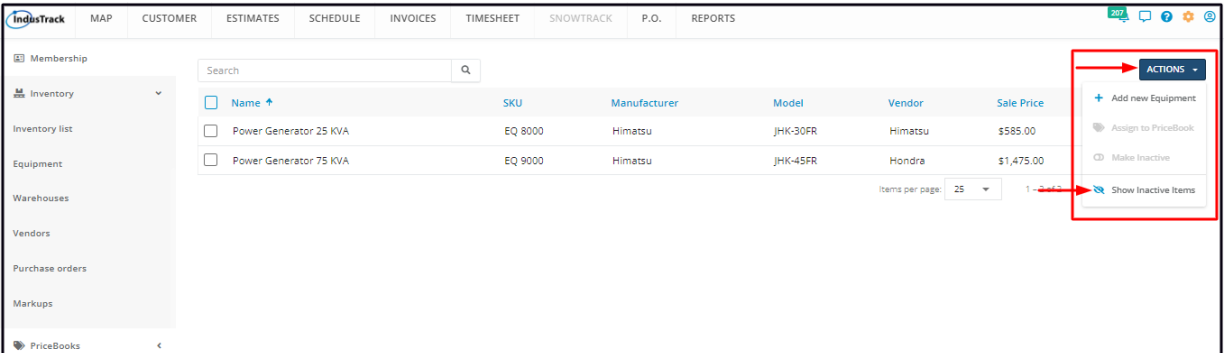
Update the equipment record and inventory as may be needed.

Delete an Equipment Record

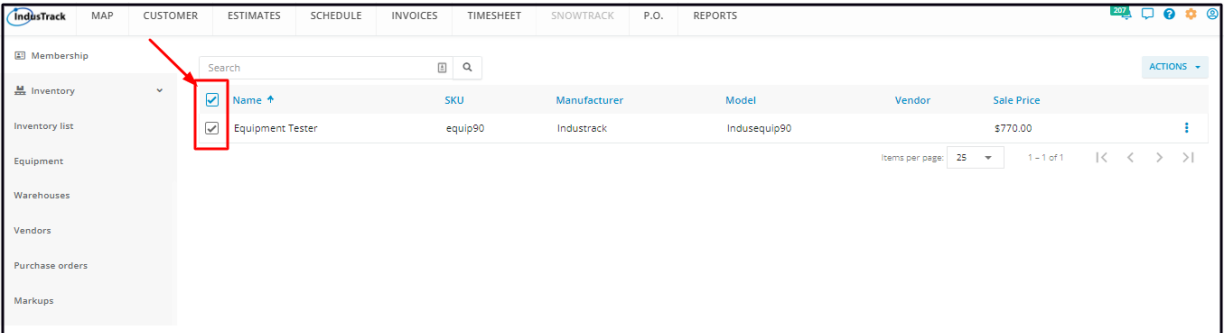
Delete an equipment record that is no longer in use or was created in error. It is wise to exercise caution when using this function. Deleting an equipment record may have an effect on other functions, settings or data.

If the record has an active status, **deactivate this first**. An Active Equipment Record cannot be deleted.

Move to the **Inactive Equipment Records** table.



Find the Equipment Record to be deleted from the list, and tick the checkbox to its left.



- To delete multiple equipment records, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.

Go to the **Actions** button, and select **Delete**.

IndustriTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

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Search

<input checked="" type="checkbox"/>	Name	SKU	Manufacturer	Model	Vendor	Sale Price
<input checked="" type="checkbox"/>	Equipment Tester	equip90	Industrack	Indusequip90	Industrack	\$770.00

Items per page: 25 1 - 1 of 1

ACTIONS

- Make Active
- Delete
- Show Active Items

A warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.

Confirmation

Are you sure you want to delete the record(s)?

CANCEL

YES

The record will be removed from the Inactive Equipment Records list.

