



# Equipment Management

An **Equipment** is a tool or vehicle that is owned by a field services organization and is utilized to perform various field services. These equipment are essential for ensuring that services are delivered efficiently, accurately, and safely. The right equipment enables technicians to diagnose problems, perform repairs, install systems, and maintain customer satisfaction. Following are examples of some equipment:

- Heavy equipment such as excavators, compactors, dozers, etc
- Power tools such as pneumatic drills, lawnmowers, snow blowers, etc
- Diagnostic and testing equipment such as pressure gauges, multimeters, drain inspection cameras, etc
- Vehicles for towing, lifting, or transporting heavy machinery

In Zoho FSM, you can manage these tools and vehicles using the **Equipments** module. You can systematically oversee, maintain, and utilize tools and machinery used in service delivery.

- You can [assign equipment to appointments](#). This ensures that technicians have the necessary tools and machinery for each service call. This also ensures that the equipment assigned to an appointment will be designated as "unavailable" for the scheduling of other jobs that need that same vehicle or equipment.
- You can add equipment to be part of [crews](#). You can also assign [territories](#) to equipment.
- You can ensure proper administration of the equipments through usage history [timelines](#), [time-off](#) recording, and [note-taking](#).



Available in Editions: **All Editions**

## Add an Equipment

**i** - Permission Required: [Equipments](#)

To add an equipment:

1. Select **Equipments** from the **Workforce** menu and click **Create**.
2. Enter the following details and click **Save**:
  - a. An **Equipment Name**
  - b. A **Description** for the equipment
  - c. Assign a **Status** to the equipment.

- d. Select the **Type** of the equipment.
- e. The **Serial Number** of the equipment. The Serial Number will be unique to an equipment.
- f. The **Model Number** of the equipment. The Model Number identifies a category of equipment that is of the same model.
- g. Indicate whether the **Warranty Status** of the equipment is Active or Expired.
- h. The **Warranty Expiry Date** of the equipment.
- i. The **Purchase Date** of the equipment.

### Create Equipment ✕

**Equipments Information**

Equipment Name

Description

Status

Type

Serial Number

Model Number

**Other Information**

Warranty Status

Warranty Expiry Date

Purchase Date

## Assign Territories to Equipment

To assign a territory to an equipment:

1. Select **Equipments** from the **Workforce** menu.
2. Click the equipment to which you want to assign a territory.
3. In the *Equipment Details* page, select the **Territories** tab and click **Create**.

Select a [territory](#), and set the *Start Date Time* and the *End Date Time* and click **Save**. The period between the *Start Date* and the *End Date* is when the equipment will be active in that territory.

Only after you assign a territory to the equipment, will:

- The equipment be listed in the **Service Resource** dropdown of the *Create Appointment* overlay, provided the service appointment is created for the same territory.
- The equipment be listed under the territory in the Gantt view of Dispatch Console.

Hover over an entry and click the **Edit** [✎] icon to modify it.

The screenshot shows the FSM interface for a specific piece of equipment. The breadcrumb trail is: Equipments > Demolition 16 Kg Road Hammer Drill Machine. The equipment details on the left include: Equipment Name (Demolition 16 Kg Road Hammer Drill Machine), Type (Power Tools), Serial Number (GBM), and Model Number (0-2600). The main view is the 'Territories' tab, which displays a table with the following data:

Name	Start Date Time	End Date Time
New Orleans	2024/08/01	

Red arrows in the image point to a '+ Create' button in the top right of the table and an 'Edit' icon (pencil) in the bottom right of the table row.

### **Points to remember**

- **Start Date** is a mandatory field.
- If an **End Date** is not provided for a territory, then the equipment will continue to be active in that territory until one is set.

## Add Equipment to Crews

You can add equipment to be part of [crews](#).

**Equipment Details**  
 Demolition 16 Kg Road Hammer Drill Machine  
 Electric model, 230V Single Phase  
 Marianne Sheehan Active

**Equipment Information**

- Equipment Name: Demolition 16 Kg Road Hammer Drill Machine
- Type: Power Tools
- Serial Number: GBM
- Model Number: O-2600

**Other Information**

- Warranty Status: Active
- Warranty Expiry Date: 30 Jul 2029
- Purchase Date: 30 Jul 2024

**Crew**

Name	Start Date Time	End Date Time
Road Repair Crew	26 Aug 2024	
Road Repair Crew	01 Aug 2024	06 Aug 2024

**Note:** A lead cannot be assigned to a crew created only with equipments. Also, you cannot schedule a service appointment with such a crew.

## View Equipment Details

On the *Equipment Details* page, the following details about an equipment will be displayed under the following sections:

### Timeline

Changes to the equipment can be tracked using its [timeline](#).

**Equipment Details**  
 Demolition 16 Kg Road Hammer Drill Machine  
 Electric model, 230V Single Phase  
 Marianne Sheehan Active

**Timeline**

All the actions and events related to this Equipment are recorded in a chronological order. [Show all updates](#) [All Time](#)

**Aug 06, 2024**

- Crew Road Repair Crew updated  
06:24 PM . Marianne Sheehan
- Time Off AB-7 linked  
05:08 PM . Marianne Sheehan
- Crew Road Repair Crew linked  
03:08 PM . Marianne Sheehan
- Crew Road Repair Crew updated  
01:10 PM . Marianne Sheehan

**Aug 01, 2024**

- Crew Road Repair Crew linked  
04:44 PM . Marianne Sheehan
- Territory New Orleans linked  
04:24 PM . Marianne Sheehan

**Jul 30, 2024**

**Owner:** Marianne Sheehan  
**Created By:** Marianne Sheehan on 30 Jul 2024 05:53 PM

# Calendar

The appointments assigned to the equipment can be viewed in the calendar with Monthly, Weekly, or Daily views. Hover over an entry to view the details. Further details of the appointment can be viewed by clicking on the entry.

The screenshot shows the FSM interface for a specific piece of equipment. On the left, there are sections for 'Equipments Information' and 'Other Information'. The main area is a calendar for September 2024, with the 'Calendar' tab selected. A pop-up window is open over an appointment on September 19th, showing details for 'WO54 / AP-53: Renewal of Pavement'. The details include: 'New' status, 'Not yet Invoiced', 'Service Resources: Demolition 16 Kg Road Hammer Drill Machine', 'Scheduled Time: 19 Sep 2024 10:00 AM to 11:00 AM', 'Contact: Lucy Robins', 'Email: lucy.robins@zylker.com', 'Phone: 111-111-1111', 'Mobile: +919980765639', 'Territory: New Orleans', and 'Service Address: Service Address, 2935 S 6th St, Springfield, Illinois, United States, 62703'.

You can also see all the entries of a day in the List view.

This screenshot shows the same equipment page but with the 'List' view selected for September 19, 2024. The calendar shows a list of appointments for that day. A pop-up window is open over the 11:00am - 12:00pm slot, displaying the same details as the previous screenshot for 'WO54 / AP-53: Renewal of Pavement'. The 'Filter by' section on the right is visible, with 'Service Appointments', 'Holiday', and 'Time Off' checked.

You can do the following in the service calendar:

- Create appointment
- Reschedule through drag and drop

### Create Appointment

1. Click on the point in the calendar that corresponds to the day or time for which you want to create the appointment.
2. In the *Create Appointment* popup, choose the work order for which you want to create the appointment.
3. In the *Create Appointment* popup, the following details will be populated, which you can change if required.

Click **Schedule** or **Schedule and Dispatch** to continue.

- a. Service
- b. Summary
- c. Scheduled Start/End Date Time
- d. Equipment

You can create appointments from the Month, Week, and Day views.

### Reschedule Appointment

From the service resource calendar, you can reschedule an appointment in the following ways:

1. Drag and drop an appointment to a different date or time
2. Resize the appointment

You can reschedule an appointment by dragging and dropping it to a different date or time. In the *Schedule Appointment* popup, the details are prefilled. Make the necessary changes and click **Schedule Appointment**. You can reschedule appointments from the Month, Week, and Day views.

You can also reschedule an appointment by resizing the appointment. Move your cursor to the bottom edge of the service appointment and when the cursor changes to a downward arrow, resize it to the duration you want for the service appointment. In the *Schedule Appointment* popup, the details are prefilled. Make the necessary changes and click **Schedule Appointment**. You can resize and reschedule appointments only from the Week, and Day views.

**Tip:** Click on the date in the Month view to go to the Day view.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Assets Workforce Reports

Equipments Demolition 16 Kg Road Hammer Drill Machine  
Electric model, 230V Single Phase  
Marianne Sheehan Active

Equipments Information

- Equipment Name: Demolition 16 Kg Road Hammer Drill Machine
- Type: Power Tools
- Serial Number: GBM
- Model Number: O-2600

Other Information

- Warranty Status: Active
- Warranty Expiry Date: 30 Jul 2029
- Purchase Date: 30 Jul 2024
- Owner: Marianne Sheehan
- Created By: Marianne Sheehan on 30 Jul 2024 05:53 PM
- Modified By: Marianne Sheehan on 30 Jul 2024 05:54 PM

Timeline Calendar Service appointments Territories Crew Time off Notes

September 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Filter by

- Service Appointments
- Holiday
- Time Off

## Service Appointments

The service appointments assigned to the equipment as an individual resource and when part of a crew will be listed here.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Assets Workforce Reports

Equipments Demolition 16 Kg Road Hammer Drill Machine  
Electric model, 230V Single Phase  
Marianne Sheehan Active

Equipments Information

- Equipment Name: Demolition 16 Kg Road Hammer Drill Machine
- Type: Power Tools
- Serial Number: GBM
- Model Number: O-2600

Other Information

- Warranty Status: Active
- Warranty Expiry Date: 30 Jul 2029
- Purchase Date: 30 Jul 2024
- Owner: Marianne Sheehan
- Created By: Marianne Sheehan on 30 Jul 2024 05:53 PM

Timeline Calendar **Service appointments** Territories Crew Time off Notes

Service Appointments

Name	Summary	Status	Billing Status	Scheduled Start Date Time	Scheduled End Date
AP-43	Road repair	New	Not yet Invoiced	2024-08-07T09:00:00+05:30	2024-08-07T10:00:00+05:30
AP-51	Pothole repair	New	Not yet Invoiced	2024-09-19T09:00:00+05:30	2024-09-19T10:00:00+05:30
AP-53	Renewal of Pavement	New	Not yet Invoiced	2024-09-19T10:00:00+05:30	2024-09-19T11:00:00+05:30
AP-55	Crack Sealing	New	Not yet Invoiced	2024-09-19T11:00:00+05:30	2024-09-19T12:00:00+05:30
AP-56	Kerb Painting	New	Not yet Invoiced	2024-09-19T12:00:00+05:30	2024-09-19T13:00:00+05:30
AP-57	Shoulder and Rain Damage R...	New	Not yet Invoiced	2024-09-23T10:00:00+05:30	2024-09-23T11:00:00+05:30
AP-58	Routine Road Maintenance	New	Not yet Invoiced	2024-09-24T11:30:00+05:30	2024-09-24T12:30:00+05:30
AP-59	Road repair	New	Not yet Invoiced	2024-09-10T00:00:00+05:30	2024-09-10T23:59:00+05:30
AP-60	Sign installation, inspection ...	Scheduled	Not yet Invoiced	2024-08-06T11:00:00+05:30	2024-08-06T12:00:00+05:30

## Territories

The territories assigned to the equipment will be listed here. Click + Create to add the territories for the user. Select a [Territory](#), and set the Start Date Time and the End Date Time and click Save.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Assets Workforce Reports

Equipments Demolition 16 Kg Road Hammer Drill Machine  
Electric model, 230V Single Phase  
Marianne Sheehan Active Edit

Equipments Information

- Equipment Name: Demolition 16 Kg Road Hammer Drill Machine
- Type: Power Tools
- Serial Number: GBM
- Model Number: 0-2600

Other Information

- Warranty Status: Active
- Warranty Expiry Date: 30 Jul 2029
- Purchase Date: 30 Jul 2024

Owner: Marianne Sheehan

Timeline Calendar Service appointments **Territories** Crew Time off Notes

Territories + Create

Name	Start Date Time	End Date Time
Zylker	02 Sep 2024	
New Orleans	01 Aug 2024	

## Crews

Details of the [crew](#) the equipment is part of will be listed here.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Assets Workforce Reports

Equipments Demolition 16 Kg Road Hammer Drill Machine  
Electric model, 230V Single Phase  
Marianne Sheehan Active Edit

Equipments Information

- Equipment Name: Demolition 16 Kg Road Hammer Drill Machine
- Type: Power Tools
- Serial Number: GBM
- Model Number: 0-2600

Other Information

- Warranty Status: Active
- Warranty Expiry Date: 30 Jul 2029
- Purchase Date: 30 Jul 2024

Owner: Marianne Sheehan

Timeline Calendar Service appointments Territories **Crew** Time off Notes

Crew

Name	Start Date Time	End Date Time
Road Repair Crew	02 Sep 2024	02 Sep 2024
Road Repair Crew	06 Aug 2024	06 Aug 2024
Road Repair Crew	01 Aug 2024	06 Aug 2024

## Time off

You can create a time off for the equipment to record the time when it will not be available. The details of the [Time Off](#) taken by the equipment will be listed here.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Assets Workforce Reports

Equipments Demolition 16 Kg Road Hammer Drill Machine  
Electric model, 230V Single Phase  
Marianne Sheehan Active

Equipments Information

- Equipment Name: Demolition 16 Kg Road Hammer Drill Machine
- Type: Power Tools
- Serial Number: GBM
- Model Number: O-2600

Other Information

- Warranty Status: Active
- Warranty Expiry Date: 30 Jul 2029
- Purchase Date: 30 Jul 2024

Owner: Marianne Sheehan

Timeline Calendar Service appointments Territories Crew **Time off** Notes

Time Off + Create

Time Off Name	Start Date Time	End Date Time	Time Off Type	Reason
AB-7	01 Aug 2024 12:00 AM	01 Aug 2024 11:59 PM	Date	Leave

## Notes

You can add and edit notes.

FSM Home Customers Work Order Management Dispatch Console Billing Services And Parts Assets Workforce Reports

Equipments Demolition 16 Kg Road Hammer Drill Machine  
Electric model, 230V Single Phase  
Marianne Sheehan Active

Equipments Information

- Equipment Name: Demolition 16 Kg Road Hammer Drill Machine
- Type: Power Tools
- Serial Number: GBM
- Model Number: O-2600

Other Information

- Warranty Status: Active
- Warranty Expiry Date: 30 Jul 2029
- Purchase Date: 30 Jul 2024

Owner: Marianne Sheehan

Created By: Marianne Sheehan on 30 Jul 2024 05:53 PM

Timeline Calendar Service appointments Territories Crew Time off **Notes**

Add a note...

**Replacement required**  
Hammer crank needs to be replaced  
Created By: Marianne Sheehan Created Time: 02 Sep 2024 05:14 PM



hammer-cran...

## Assigning Equipments to Service Appointments

You can assign equipments to a service appointment. Refer to [this](#) page to know more about creating a service appointment.

In the **Service Resource** dropdown, select **Equipment** and choose the equipments you want to assign to the service appointment.

**Create Service Appointment**

Work Order Details  
WO67 Road repair  
New Service Marianne S...

**Service Appointment Summary**

Service: Road Repair (SVC-106)  
New, Quantity: 1

Summary: Road repair

Type: Service

Asset: Search Asset

Currency: USD

Exchange Rate: Equipment

Scheduled Start Date: Time

Scheduled End Date: Time

Service Resource: Select

Available Equipments:  
Medium Wheel Loader  
Uniworld Ride On Road Roller  
Demolition 16 Kg Road Hammer Drill Machine

Buttons: Cancel, Schedule, Schedule and Dispatch

If you assign only equipment to a Service Appointment, then the status of the created appointment will be **New**.

**Confirmation**

The Service Appointment is created from 06 Sep 2024 11:45 AM to 06 Sep 2024 12:45 PM.

It is assigned to some equipment but not to a technician. Therefore, the Service Appointment status will be 'New'.

Buttons: Cancel, Confirm

You can assign equipments to appointments from the [dispatch console](#) too.

You can create [time sheets](#) with just an equipment.

### Add Time Sheet ✕

**Time Sheet Information**

Service Resource

Description

Start Date/Time

End Date/Time

Service 

Road Repair (SVC-98) ✕  
 Scheduled, Quantity: 1

While creating a scheduled maintenance, you can select equipments as the **Service Resource** in the *Service Appointment Template*. However, if you choose only equipments as the Service Resource, then the created service appointment will be in the **New** status.

**Create Service Appointment template**
✕

**Service Appointment Summary**

Summary

Type

Currency

Exchange Rate

Scheduled Start Date Time  Same Day  1 Day(s) After At 10:00 AM

ⓘ Relative to Maintenance Plan Scheduled Date

Scheduled End Date Time  Same Day  1 Day(s) After At 10:00 AM

ⓘ Relative to Maintenance Plan Scheduled Date

Service Resource

NOTE : At the time of creation, if any of the chosen Service Resources are unavailable, the Service Appointments will remain unassigned.

Dispatch Appointment

## Using Equipments In Mobile App

You can assign equipments while [creating](#) or rescheduling service appointments from the mobile app. In the *Create Service Appointment* screen, tap on the **Service Resource** field, choose **Equipments** from the dropdown in the *Add Service Resource* screen, select an equipment and tap **Save**.

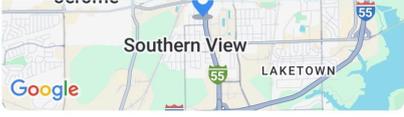
← Create Service Appointment

Services

* service	Road Repair (SVC-106) <span>×</span> New, Quantity: 1	>
* Summary	Road repair	
Type	Service	▼
Asset		
* Currency	USD	▼
* Exchange Rate	1	
* Scheduled Start Date Time	06 Sep 2024, 11:45 AM	📅
* Scheduled End Date Time	06 Sep 2024, 12:45 PM	📅
Service Resource	<span>🔗 Demolition 16 Kg Road Har</span> <span>×</span> <span>👤 Marianne Sheehan</span> <span>×</span>	

Schedule Schedule & Dispatch

The assigned equipments will be listed in the Assigned Resources section in the *Service Appointment Details* page.



[View on map >](#)

Contact



👤 [Ms. Lucy Robins](#)  
lucy.robins@zylker.com  
111-111-1111

Company

No Company linked

Assigned Resources



Agents

👤 Marianne Sheehan (Lead) ⋮

Equipments

🔧 Demolition 16 Kg Road Hammer Drill Machine