



Aptean Equipment ERP

The Equipment Provider's Guide to ERP





While every equipment business is unique, their lifecycles follow a definite pattern. Early on, transactions can be done by hand, but as the company grows, accounting software and other applications necessary for specific functionalities begin to accumulate.

This sort of patchwork approach will serve the organization for a while, but eventually the many disparate systems start to impede progress more than they facilitate it. Only those employees responsible for using and maintaining the various tools will have the knowledge to operate them, and the data they capture will get stuck in a silo.

At that point, the need for a centralized, integrated solution starts to become clear. Having all your information in one place and enabling automatic updates to your facts and figures is vital to remain agile as your operations expand and quickly identify which of your processes are working well and which need to be addressed.

Enterprise resource planning (ERP) platforms are the next step for equipment businesses at this stage. Your organization could be anywhere in this lifecycle, but as an industry professional, getting acquainted with the advantages of ERP and understanding what they could mean for your company is a prudent step to take.

From quoting and pricing to service automation, parts planning and rental fleet management, ERP systems like [Aptean Equipment ERP](#) can handle it all and serve your entire staff as the single, definitive version of the truth.



Core Functionalities that Support Your Business

An equipment industry-specific ERP solution really can do it all for your business. Among their key functionalities are:

Dispatch Board

- › Service managers can dispatch any and all service requests to your technicians
- › Filter by type of service, customer, equipment and more
- › Fully configurable layout
- › All scheduling can be done on a single screen

Service Contract Management

- › Manage all guaranteed, long-term and planned maintenance agreements
- › Enter contracts based on service cycle, utilization time from hour meter readings or a combination of the two
- › Aptean Equipment ERP can suggest service work orders that need to be created based on contracts with the Service Planning Worksheet tool
- › All contracts entered will also show up in the Dispatch Board, facilitating communication with technicians

Technician Availability

- › View availability of all technicians in a given time period, as well as their skills and certifications
- › From the same view, users can schedule those technicians to specific jobs and also view that individual's current service work orders

WIP Order and Labor

- › All open work orders can be seen in a single view
- › Labor time associated with each work order can be compared to the budgeted time

Field Service

- › Mobile access to inventory, warranty status, timekeeping tools, customer data and more for all field technicians
- › System updates with all new information that technicians report when on the job
- › Aptean Equipment ERP can integrate with telemetry services for meter readings on equipment and other functionality

Rentals Functionality that Supports Your Business

The equipment rental industry continues to surge, with the sector projected to reach \$145 billion globally by 2026. As an equipment provider, you need to be able to capitalize on this growth and the increased opportunities it represents, and for that, you need ERP technology that simplifies and secures contract management, shipping, billing and fleet management, regardless of your business's size.

Availability Tree

- › Aptean Equipment ERP's sortable availability tree allows users to filter by equipment type, model, manufacturer, location, capacity fleet size, current rentals, etc.

Rental Contract Management

- › Generate contracts and quotes for customers with a single click in the availability tree
- › Convert quotes to rental contracts (partial or completed), with all results captured automatically by the system
- › Serialized and non-serialized items can be on the same rental contract
- › Efficient training via rental contract "wizards" (pop-up windows) guiding users through contract creation
- › Aptean Equipment ERP supports multiple billing cycles, including pre-billing, post-billing and configurable stair-billing
- › Rental contracts automatically tied to required service work, including pre-delivery inspections, check-in inspections, etc.
- › All service orders created also carried over to Service Dispatch Board
- › Rental exchange wizards also walk users through necessary steps for finding replacement equipment for customers
- › End-of-contract wizards assist in finalizing charges, including adjustments for mid-period return and additional charges for pickup, damage, etc.
- › Easily cancel contracts or specific units within a contract

Cross-Department Hub

- › Manage service work orders, purchasing and other functions within rentals module
- › Easy access to key rental fleet information, including book value, dollar and time utilization, profitability for defined time periods and more
- › All data exportable to Microsoft Excel for additional analysis
- › Simple and fast calculation of earned and accrued rental income for accurate financial reporting





Shipping

- › Warehouse shipments and availability statuses automatically generated
- › Units can be returned to any branch, regardless of originating location

Billing

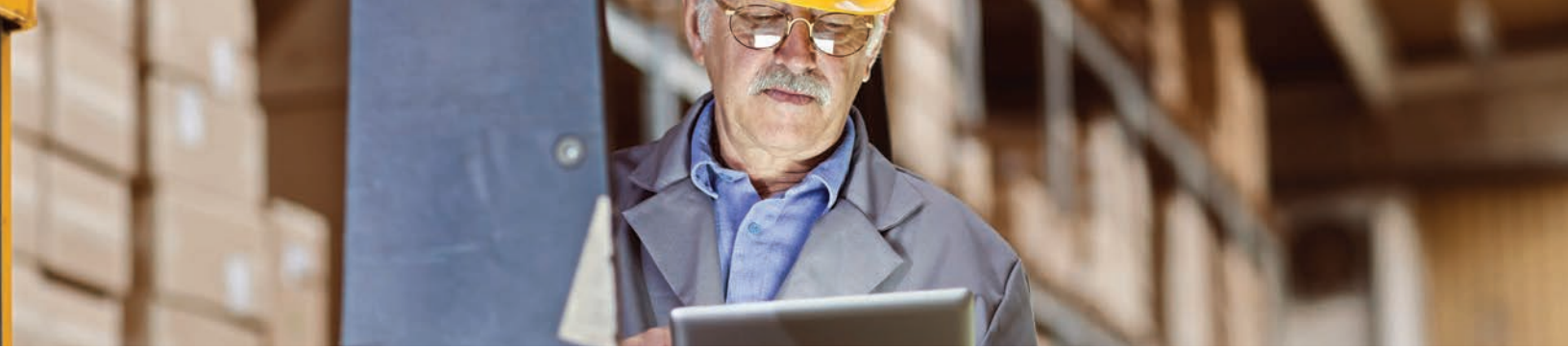
- › Change next billing to daily, weekly or monthly based on customer's needs
- › Rental contracts and invoices automatically updated with applicable charges, including delivery and pickup fees

Fleet Management

- › Appropriate for fleets from less than 100 units to more than 30,000
- › Improved and simplified fleet maintenance with comprehensive utilization details
- › Paperwork is minimized or entirely eliminated
- › Greater accuracy and reliability in customer communication

Logistics/Warehousing

- › Equipment receipts, shipments and transfers all under one logistics/warehousing module



Sales Functionality that Supports Your Business

Sales Orders

- › Aptean Equipment ERP's sales order module acts as the hub of the system, linking to all other parts and automatically updating with any changes
- › Send automated approval requests via email to designated employees; another automated email is sent to requester with approval or rejection
- › Easily convert quotes to sales orders while maintaining all details
- › Track quote version history, as well as lost quotes
- › Integration with Service and Purchase Orders
- › Automatically generate service work orders—including pre-delivery inspection service tickets—and any necessary purchase orders
- › Purchase orders automatically create applicable equipment records upon receipt of equipment
- › Capitalize or expense service orders to the unit worked on
- › Automatically adjust cost of sale for service orders capitalized after sale of unit

Logistics/Warehousing

- › Compile all equipment pickups, deliveries and transfers in a single planning sheet
- › Schedule and dispatch transportation/logistics runs
- › Logistics document packages facilitate management of paperwork

Lease Management

- › Accurately record sales-type lease agreements with robust accounting functionality
- › Define types of leases, lease rates and maintenance rates with built-in lease calculator
- › Order equipment and generate recurring lease/maintenance billing contracts
- › Manage accounting schedules and sales-type lease arrangements

Trade-Ins

- › Manage trade-ins with equipment order interface, capturing make, model, value and allowance value for the sale

Customer Relationship Management (CRM)

- › Ensure salespeople get the most from marketing opportunities with opportunity and campaign management tools
- › Access customer and work order histories, parts availability and delivery schedules
- › Integrate contact information with smartphones for mobile access when working with prospects and customers
- › Gain immediate insight into sales activities via sales management functionality

Parts Functionality that Supports Your Business

Inventory Management

- › Upload vendor parts catalogs
- › Manage physical inventory with automated running journals and cycle count sheets
- › Maintain supersedes for parts by linking replacement to original
- › Calculate and set safety stock levels for all parts
- › Part statuses change automatically per location based on aging and movement
- › Track cores with customers and suppliers

Replenishment

- › Set different stocking levels for parts by branch, location or van
- › Apply MRP planning (supply methodology) and generate running work sheets to gauge quantity of parts on-hand
- › Easily transfer parts between branches

Manufacturer Parts

- › Aptean Equipment ERP allows for direct import of manufacturers' price tapes, including costs and resale prices based on configurable margin rules
- › Easy management of parts from different manufacturers



Equipment Management Functionality

Transfers

- › Control movement of new, used and rental equipment
- › Track change of ownership

History

- › Maintain complete equipment history from purchase to rental to sale to repurchase

Warranty Management

- › Track warranty claims against specific equipment

Component and Attachment Management

- › Manage serialized cabs, engines, forks and other components, accessories, dealer options and attachments

Financials and Reporting Functionality that Supports Your Business

Financials

- › Aptean Equipment ERP acts as a dimensional accounting solution, assigning elements like branch, department, manufacturer, product line and more to different dimensions, reducing Chart of Accounts by an order of magnitude and improving reporting and administrative productivity
- › Real-time accounting system automatically posts operational transactions to appropriate ledger and sub-ledger, facilitating immediate insights
- › Export to Word or Excel using stylesheets and links to external documents
- › Manage allocations, budgeting, account schedules, consolidations, responsibility centers, financial reporting standards, changelogs, intercompany transactions, dimensions, bank reconciliations and multiple currencies in a single unified platform
- › Integrate accounts payable and receivable with general ledger and inventory
- › Reduce accounts payable administration time with integration to third-party Optical Character Recognition (OCR) functions that read invoices and automatically match to vendor and purchasing document
- › Facilitate electronic funds transfers, printing of MICR encoded checks, positive pay and other advanced features

Reporting

- › Utilize tactical and operational reporting
- › Detailed, real-time reports can be exported to Excel for ease of use
- › Take advantage of easy-to-use report features integrating Excel functions like charting, pivot tables and conditional formatting
- › Put advanced analytical and business intelligence (BI) capabilities to use with Excel or Power BI

Costing

- › Implement automatic accrual of equipment received but not invoiced
- › Associate related costs against items or documents with Item Charge Assignment tool—perfect for freight, duty, storage and other associated costs

The Benefits of an Industry-Specific ERP Solution

The implementation of an ERP system is no small feat, but a well-planned process will lead to a successful digital transformation and a host of benefits, including:

- › Greater efficiency and fewer errors thanks to automated data capture
- › Better, more informed decision-making with complete information easily accessible
- › Improved data security and less reliance on skills and knowledge tied to select individuals
- › Agility and flexibility in a world of quickly changing demands and tough competition
- › Faster, more reliable reporting that leads to excellent customer satisfaction
- › A focus on teamwork and collaboration between departments with a single platform

As an equipment provider, your business is specialized and needs specific tools to get the job done. When selecting the ERP solution that fits your organization, take into account the industry experience of the provider and the tailored tools that the system offers.

You'll also want to check in with the provider's other customers to gauge their results and satisfaction. It's also vital to get a good idea of just what the implementation process will entail, as well as how the provider will continue to support your company and its employees after the platform is in place.



“With Aptean Equipment ERP and Microsoft Dynamics, we have full assurance that our investment can be leveraged for as many years as we need it.”

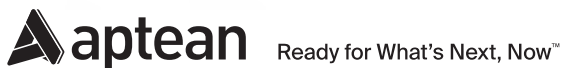
Brad Baker, President, Cardinal Carryor



Are You Ready to Learn More?

To learn more about Aptean Equipment ERP and how it stands above other comparable alternatives, contact us today.

Contact us at **info@aptean.com** or visit **www.aptean.com**.



About Aptean

Aptean is one of the world's leading providers of industry-specific software. Our enterprise resource planning and supply chain solutions are uniquely designed to meet the needs of specialized manufacturers and distributors, while our compliance solutions serve specific markets such as finance and life sciences. With both cloud and on-premise deployment options, Aptean's products, services and unmatched expertise help businesses of all sizes, across many industries, to scale and succeed.

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