

EquipmentHub Connect

Run, Automate & Grow Your Business

Customer User Guide & Benefits Overview

1. What is EquipmentHub Connect?

EquipmentHub Connect is a **commercial SaaS layer** that sits on top of the EquipmentHub platform you already use. It turns the marketplace, CRM, WhatsApp inbox and AI engines into a single, subscription-managed workspace so that any heavy-equipment business — rental supplier, OEM dealer, service network partner, or materials vendor — can **operate end-to-end from one screen**.

You get **CRM, multi-channel communication, marketing campaigns, support ticketing, AI workforce automation and white-label branding** under one roof — without maintaining a separate CRM, no separate login, no separate database.

2. Who is it for?

- **Equipment rental companies** managing 1–200+ machines who need lead follow-up at scale.
- **OEM dealers** handling new & used sales, inspections, and after-market service.
- **Service & AMC/FMC providers** coordinating breakdown response and contract renewals.
- **Industrial material suppliers** running bulk inbound enquiries from multiple cities.
- **Workforce / inspection partners** that need branded customer touchpoints.

3. Core Benefits

✓ **Centralized CRM** — Every lead, call, email and WhatsApp message in one timeline — no more spreadsheets or lost conversations.

✓ **Automated Follow-Ups** — AI nudges your team the moment a lead goes cold so no deal slips through the cracks.

✓ **Multi-Channel Reach** — Email, WhatsApp and SMS from a single composer with per-plan quotas — stop juggling 3 inboxes.

✓ **Marketing That Scales** — Bulk campaigns, landing pages and referral programs — launch in minutes, not weeks.

✓ **AI Workforce Add-On** — AI CEO, AI CRM Manager, AI Sales Coach — enterprise-grade intelligence without hiring overheads.

✓ **White-Label Branding** — Your logo. Your domain. Your emails. (Enterprise only — [crm.yourcompany.com](#) style setup).

✓ **Audit-Grade Governance** — Every send, every edit, every quota-breach logged for compliance and investor data-rooms.

✓ **No Separate Database** — Connect sits on top of your EquipmentHub master data — zero data duplication, zero migration risk.

4. Step-by-Step: How to Start Using Connect

Follow this 8-step onboarding to get from signup to first automated journey in under one afternoon.

1. Pick a Plan

Visit the /connect page, review the 4 subscription tiers (Micro · Small · Business · Enterprise), and click Start Free Trial. All plans include a 15-day business trial — no credit card required at sign-up.

2. Activate Modules

On your Connect Dashboard, flip on the modules you need: CRM, Communication, Marketing, Support, AI Workforce. Each module unlocks the matching workspace in the top navigation.

3. Import or Capture Your First Clients

Head to Client Master → Bulk Import to upload an Excel/CSV, or begin capturing leads automatically from the public requirement form, WhatsApp inbox, phone/email adapters, and referral links.

4. Set Up Communication Channels

In Communication Center → Templates, pick ready-made Email + WhatsApp templates (or create your own). WhatsApp uses the official EquipmentHub Business number +91 8810453776 by default.

5. Turn On AI CRM Automation

Toggle the welcome, follow-up, opportunity-alert and awareness journeys. The AI CRM Manager will begin sending timely, policy-compliant WhatsApp + Email on your behalf — opt-in and 24-hr window governance built in.

6. Launch a Marketing Campaign

From Marketing → Campaigns, select a client segment, choose a template, pick a channel and schedule. Live analytics appear on the Marketing dashboard within minutes of launch.

7. Branding & White-Label (Enterprise)

Enterprise subscribers can configure crm.yourcompany.com, upload a logo, pick a theme, and auto-brand every outgoing email, PDF invoice and quote. Set this up at /connect/branding.

8. Monitor, Scale, Grow

The Connect Dashboard shows real-time usage versus plan quotas. Upgrade in one click when you cross 80%. Export full reports as XLSX or investor-grade PDFs from the Data Room anytime.

5. Plans & What's Included

Four plans scale with your business — pick based on fleet size. Enterprise unlocks unlimited quotas and white-label branding. All plans ship with a **15-day business trial**.

Plan	Best For	Price (■/mo)	Users	Contacts	Emails/mo	WhatsApp/mo
Micro Business	1–10 Machines	999 – 2,999	2	500	500	50
Small Business	11–50 Machines	2,999 – 7,999	5	2,000	2,000	500
Business	51–200 Machines	10,000 – 25,000	15	10,000	10,000	2,500
Enterprise	200+ Machines	25,000 – 100,000	Unlimited	Unlimited	Unlimited	Unlimited

Modules by plan

Module	Micro Business	Small Business	Business	Enterprise
CRM	✓	✓	✓	✓
Communication	✓	✓	✓	✓
Marketing	✓	✓	✓	✓
Support	—	✓	✓	✓
AI Workforce	—	—	✓	✓
White Label	—	—	—	✓
Advanced Reports	—	—	—	✓

6. Frequently Asked Questions

Q. Is my existing EquipmentHub data affected if I enable Connect?

No. Connect sits above your existing Client Master, Requirements and CRM collections. There is no new database and no migration.

Q. What happens when I hit a quota limit?

You'll see an 80% warning banner, and at 100% the specific action (send email / fire WhatsApp / add contact) is blocked gracefully with an inline upgrade prompt. Nothing is lost.

Q. Can I switch plans mid-cycle?

Yes. Admin → Connect → Plans supports instant upgrade (pro-rated) or downgrade at next cycle. All historical data remains intact.

Q. Does the 15-day trial restrict any feature?

No. Trial unlocks the full Business plan feature-set with trial-grade quotas so you can evaluate without constraints.

Q. Who owns the customer data in Connect?

You do — always. EquipmentHub is a processor, not a controller. Export your data anytime from Admin → Data Room.

Q. Is WhatsApp campaigning included?

Journeys (welcome, follow-up, alerts) ship on all plans. Full campaign blaster is in Phase 2 and will respect the per-plan WhatsApp quota.

Q. How is compliance handled?

Opt-in is captured explicitly on the public requirement form, STOP/UNSUBSCRIBE keywords honoured instantly, 24-hour template rules enforced automatically, and every send writes to the immutable audit log.

Q. Can I run Fleet Cloud and Maintenance Cloud alongside Connect?

Yes. Connect handles customer-facing CRM/communications; Fleet Cloud and Maintenance Cloud remain separate products for your internal fleet operations.

7. Getting Help

Email info@equipmenthubindia.com • WhatsApp [+91 8810453776](tel:+918810453776) • Web www.equipmenthubindia.com
• In-app /support ticketing.