

Add and Manage Task Templates

December 14, 2019

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Task Templates help you save time when you have tasks or services that are done repeatedly in different jobs. By using templates, you avoid mistakes, save setup time, and don't need to re-enter the same details each time.

Where to Find Task Templates

Go to:

Settings > Scheduling > Task Templates

The screenshot shows the IndusTrack software interface. At the top, there is a navigation bar with tabs for IndusTrack, MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, PROJECTS, P.O., and REPORTS. To the right of these tabs are several utility icons: a notification bell, a chat bubble, a question mark, a gear (settings), and a user profile. A blue arrow points to the gear icon. Below the navigation bar, there is a sidebar on the left with a menu. The 'Scheduling' menu item is highlighted with a blue arrow pointing to it. Under 'Scheduling', 'Task Templates' is highlighted with a blue box. The main content area shows a table with a filter input, a 'CLEAR FILTER' button, and an 'Actions' dropdown. The table has three columns: 'Name', 'Filter change', and 'Task Counts'. The table contains three rows: 'Name ↑', 'Filter change', and 'Pool maintenance', each with a checkbox and a 'Task Counts' value of 1. At the bottom of the table, there is a pagination control showing 'Items per page: 15' and '1 - 3 of 3'.

<input type="checkbox"/> Name ↑		Task Counts
<input type="checkbox"/> Filter change		1
<input type="checkbox"/> Pool maintenance		1
<input type="checkbox"/> Task Template		1

Create a New Task Template

1. Click the **Actions** button.
2. Select **+ Add New Task Template** from the dropdown.

The screenshot displays the IndusTrack software interface. At the top, there is a navigation bar with tabs for MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, PROJECTS, P.O., and REPORTS. On the left, a sidebar contains menu items: Mobile App, Membership, Expenses, Inventory, Scheduling, and General settings. The main area shows a list of task templates. At the top of this area, there is a 'Filter:' input field, a 'CLEAR FILTER' button, and an 'Actions' dropdown menu. The dropdown menu is open, showing options to '+ Add new Task Template' and 'Delete'. Below the list, there is a pagination control showing 'Items per page: 15' and '1 - 4 of 4'.

Fill Out the Template Details

Fields marked with * are required.

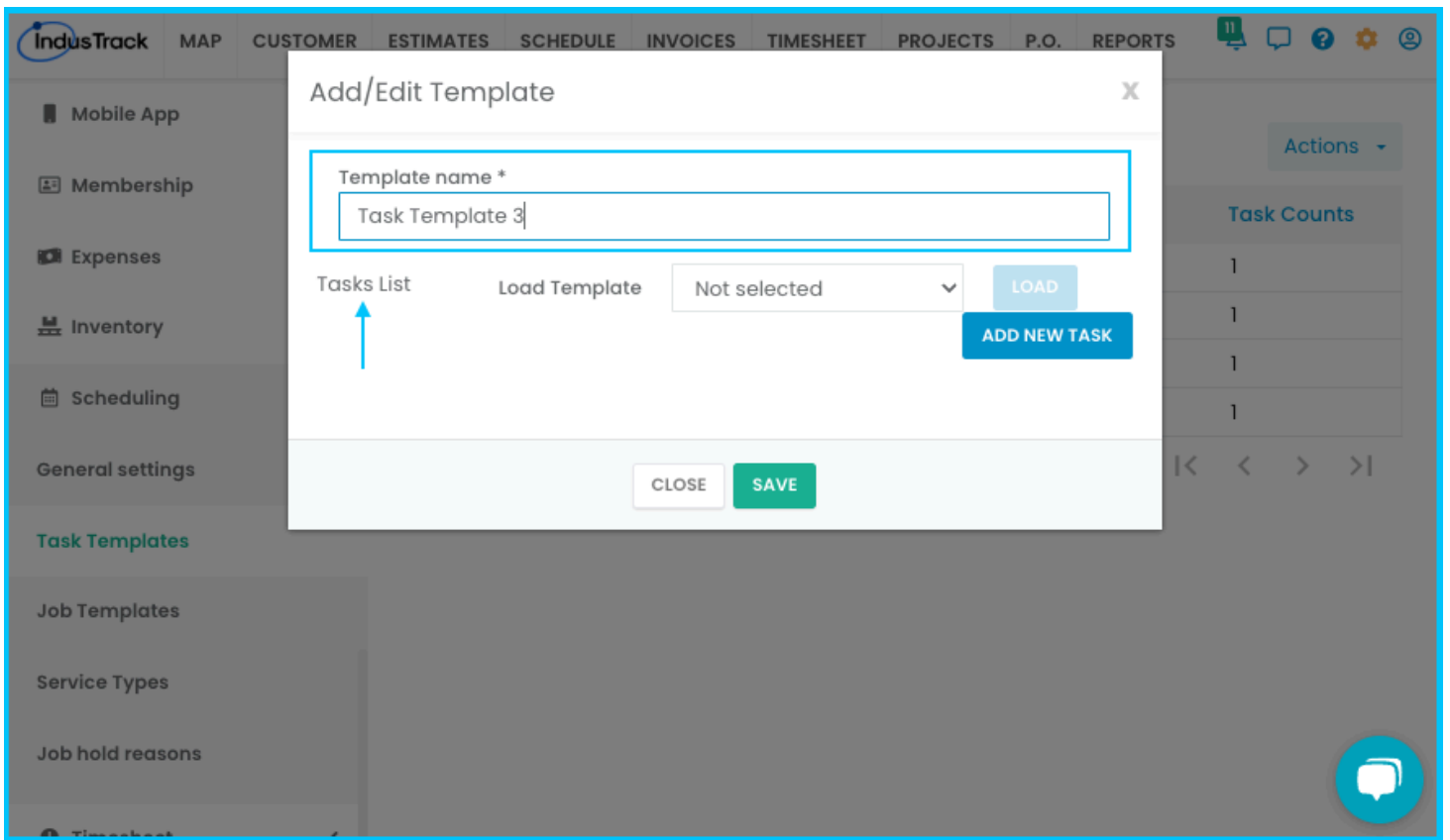
Template Name*

Enter a name for your template.

Task List

You can add tasks in two ways:

- Load an existing task template
- Create a new task



Option 1: Load an Existing Template

1. Click the **Load Template** field.
2. Select a template from the list.
3. Click **Load** to add its tasks.

You can edit the loaded tasks if needed—this won't affect the original template.
To load more templates:

- Save the current one first.
- Reopen it and load another.
- Repeat as needed.

<https://support2.industrack.com/wp-content/uploads/2019/12/taskt3.mp4>



Option 2: Create a New Task

1. Click **Add New Task** to expand the task section.
2. Fill in the following details:

Task Name

Enter a name for the task.

Service Type

Choose the right type from the dropdown.

Parts/Services/Equipment (Select)

- Type the item name and choose it from the list.
- This can include:
 - Parts or materials (inventory or non-inventory)
 - Service
 - Assembly
 - Equipment

Parts/Services/Equipment (Add)

- Enter the quantity.
- Click **Add** to include it in the task.

You can continue adding more items the same way.

Need to Add a New Item?

*If the item is a new one and has not been entered into the system (not on the list), create a profile for it first. To do this, go to the Inventory or Equipment page **OR** create the profile straight from the Task Template page.*

1. Click **Create a New Item**.
2. Choose the type: Inventory, Non-inventory, Service, Assembly, or Equipment.
3. Complete the item profile.
4. Save the item—it will now be added to the system and your task.



- Depending on the selected Inventory Type, create the item profile on the corresponding window.

Add Inventory

General

Name *

SKU

Manufacturer Part #

Vendor

Non taxable

Income Account

Sales price/rate

Sales description

Expense Account

Cost

Purchasing description

Stock

Asset Account

Main warehouse quantity on hand *

Reorder point

Use serial #s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Total quantity:			0

CANCEL SAVE

Add Non-Inventory



General

Name *

SKU

Manufacturer Part #

Vendor

Non taxable

Income Account

Sales price/rate

Sales description

Expense Account

Cost

Stock

Asset Account

Main warehouse quantity on hand *

Warehouse	Bin #	Isle #	QTY
Total quantity:			0

CANCEL

SAVE

Add Service



Name *

SKU

Non taxable

Income Account

Sales price/rate

Sales description

Expense Account

Cost

CANCEL

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Add Assembly ←
✕

Name *

SKU

Configurable

Non taxable

Parts

NAME	QTY	
<input style="width: 80%;" type="text" value="Parts search"/>	<input style="width: 10%;" type="text" value="1"/>	+ ADD PART

Services

NAME	QTY	
<input style="width: 80%;" type="text" value="Services search"/>	<input style="width: 10%;" type="text" value="1"/>	+ ADD SERVICE

Sales price/rate

Sales description

CANCEL
SAVE

Add Equipment ←
✕

General

Serial Numbers

Name *

SKU *

Picture [CHOOSE FILE](#) Max size 1Mb

Manufacturer *

Model *

Vendor

Quantity on hand *

Reorder point

Asset Account

Non taxable

Sales price/rate

Sales description

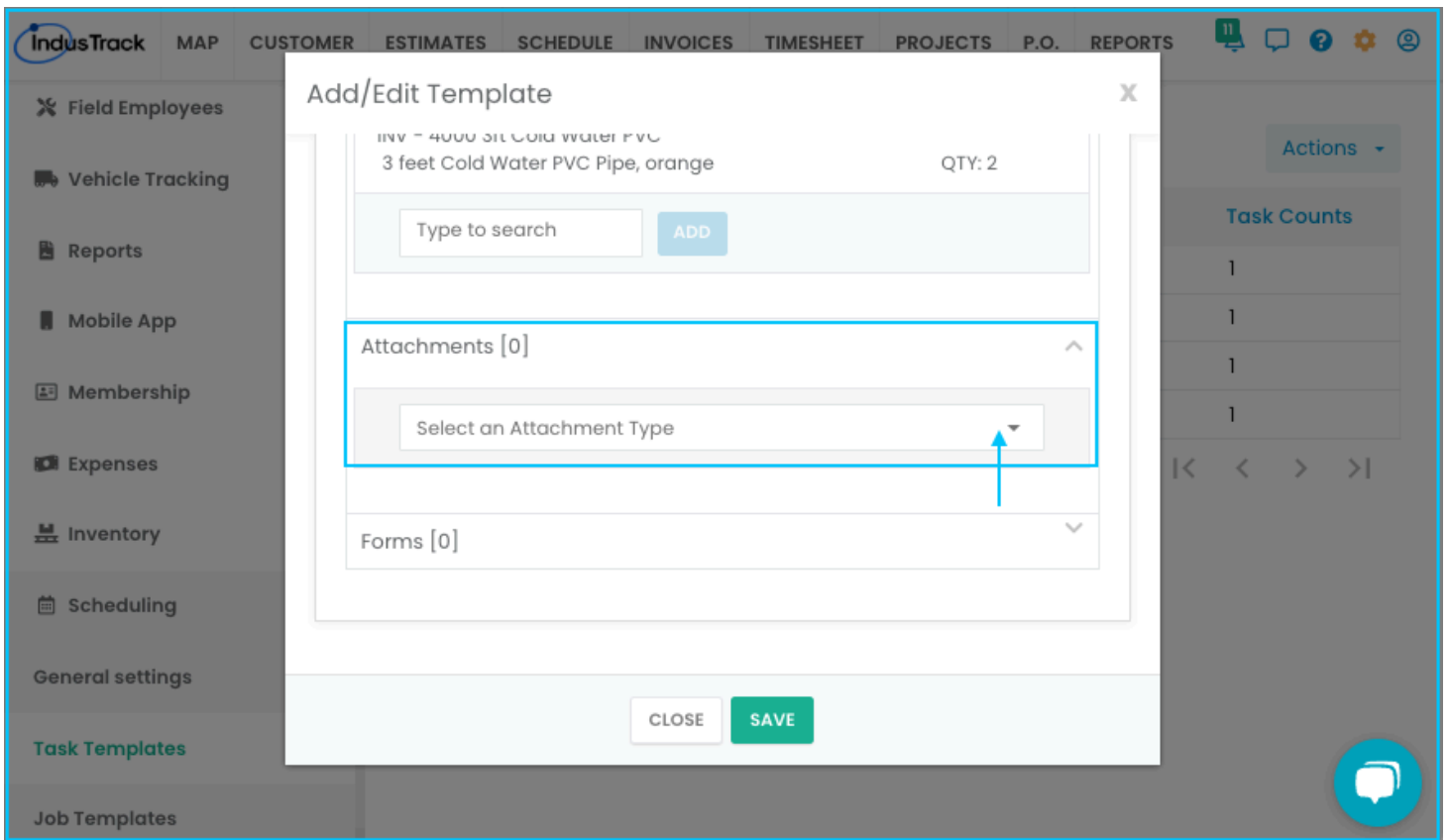
Income Account

CANCEL
SAVE

Attachments

You can attach photos, manuals, or other documents.

- Add a link, upload a file, or attach an existing one.



Forms

Attach forms that need to be filled out or signed.
If the form doesn't exist yet, you can:

- Upload it as an attachment
- Add it through the **Forms** page

To add a form:

1. Select the form.
2. Choose when it should be triggered.
3. Click **Add**.

Add as many forms as needed.



Add More Tasks

Click **Add New Task** again to include more tasks in the template.

Save the Template

Click **Save** when you're done. Your new template will now appear in the list.

Working With Tasks in the Template

- **Reorder Tasks:** Use the arrows on the left.
- **Expand/Collapse Task Details:** Use the arrows on the right.
- **Delete a Task:** Click **Delete Task**.



Edit a Task Template

1. Find the template from the list.
2. Click to open it in **edit mode**.
3. Make any changes needed.
 - To remove a task: click **Delete Task**
 - To remove items (forms, attachments, parts): click the **X** next to the item



Delete a Task Template

⚠ Be careful. Deleting a template cannot be undone and may affect other settings or jobs.

1. Check the box next to the template you want to delete.
 - To select multiple, check each one.
 - To select all, check the box at the top of the list.
2. Click the **Actions** button and select **Delete**.
3. Confirm in the warning pop-up.

The template will be removed from the list.

<https://support2.industrack.com/wp-content/uploads/2019/12/taskt17.mp4>



