Scheduling General Settings

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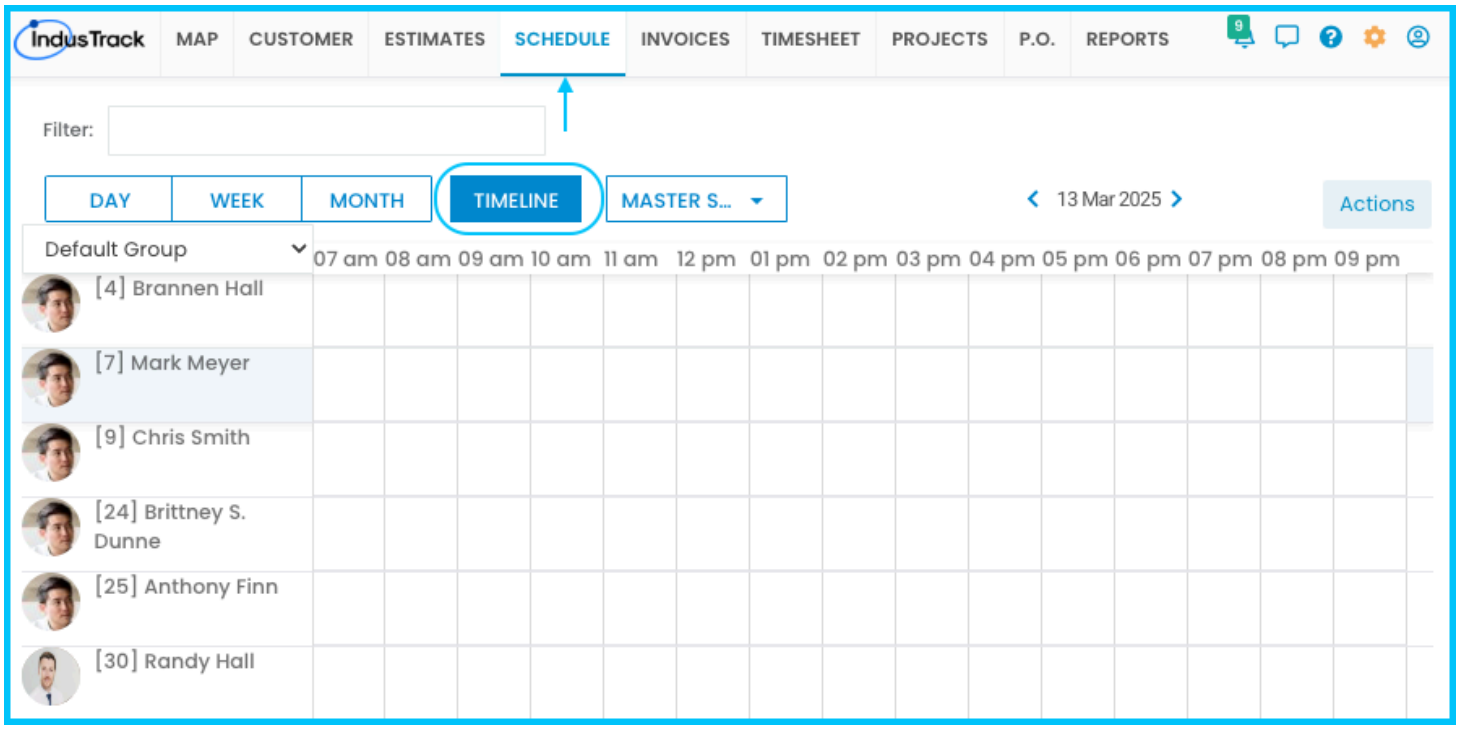
The **Schedule Module** shows a **Timeline View** of your field employees' schedules, broken down by the hour for the current day. You can set up general scheduling rules in IndusTrack to customize how scheduling works for your business.



Accessing Scheduling Settings

1. Go to **Settings** > **Scheduling**
2. You'll see several options:
    - **General settings** – Customize calendar settings and job colors.
    - **Task Templates** – Create templates for recurring job tasks.
    - **Job Templates** – Save job templates for easy scheduling.
    - **Service Types** – Categorize jobs for easier reporting and billing.
    - **Job On Hold Reasons** – Define reasons for putting a job on hold.

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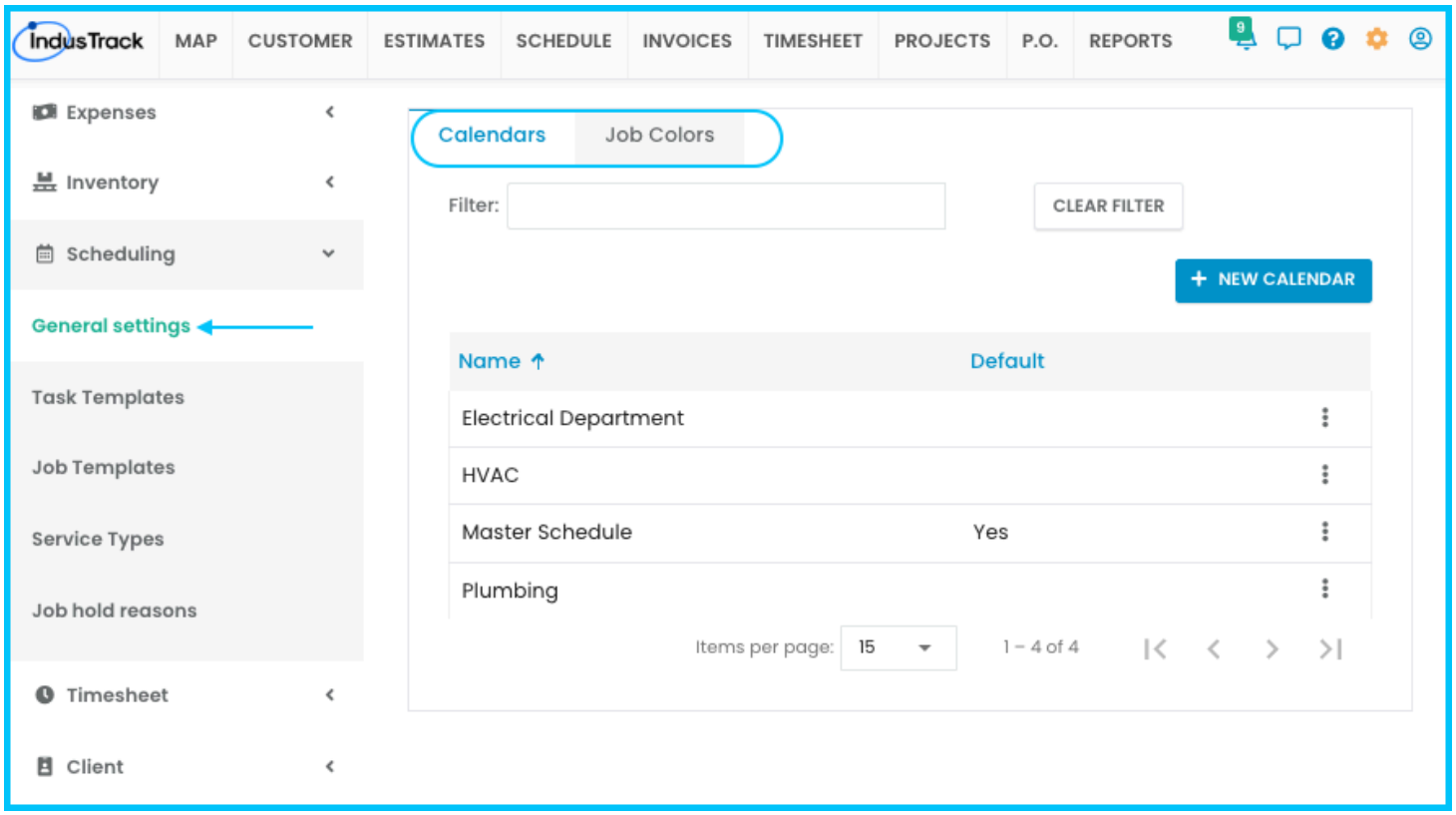
Key Scheduling Settings

1. General Settings



- **Calendars**
  - Create and edit different calendar types.
  - Set the start and end times of the scheduling grid.
  - Set the default estimate duration for a job.

To add a new custom calendar:

1. Click the **+ New Calendar** button.

2. Enter details in the **Add Calendar** window. Required fields are marked with *.
    - **Name*** – Give your calendar a name.
    - **Work Times** – Default is **9:00 AM – 5:00 PM**, but you can adjust it.
    - **Job Duration** – Default is **1 hour**, but this can be changed.
    - **Assigned Employee Groups** – Select field employee groups to include in this calendar. If no group is assigned, this calendar **cannot be used in the Schedule Module**.
3. Click **Save** to add the calendar to the list.

The **Default Calendar View** automatically includes all field employees and does not require assigned groups.

- **Job Colors**
    - Assign color schemes for different jobs.

Adding a New Job Color

1. Click **+ New Job Color**.
2. Enter the required details:
    - **Name**: Assign a name.
    - **Color**: Select a color.
3. Click **Save** to add it to the list.

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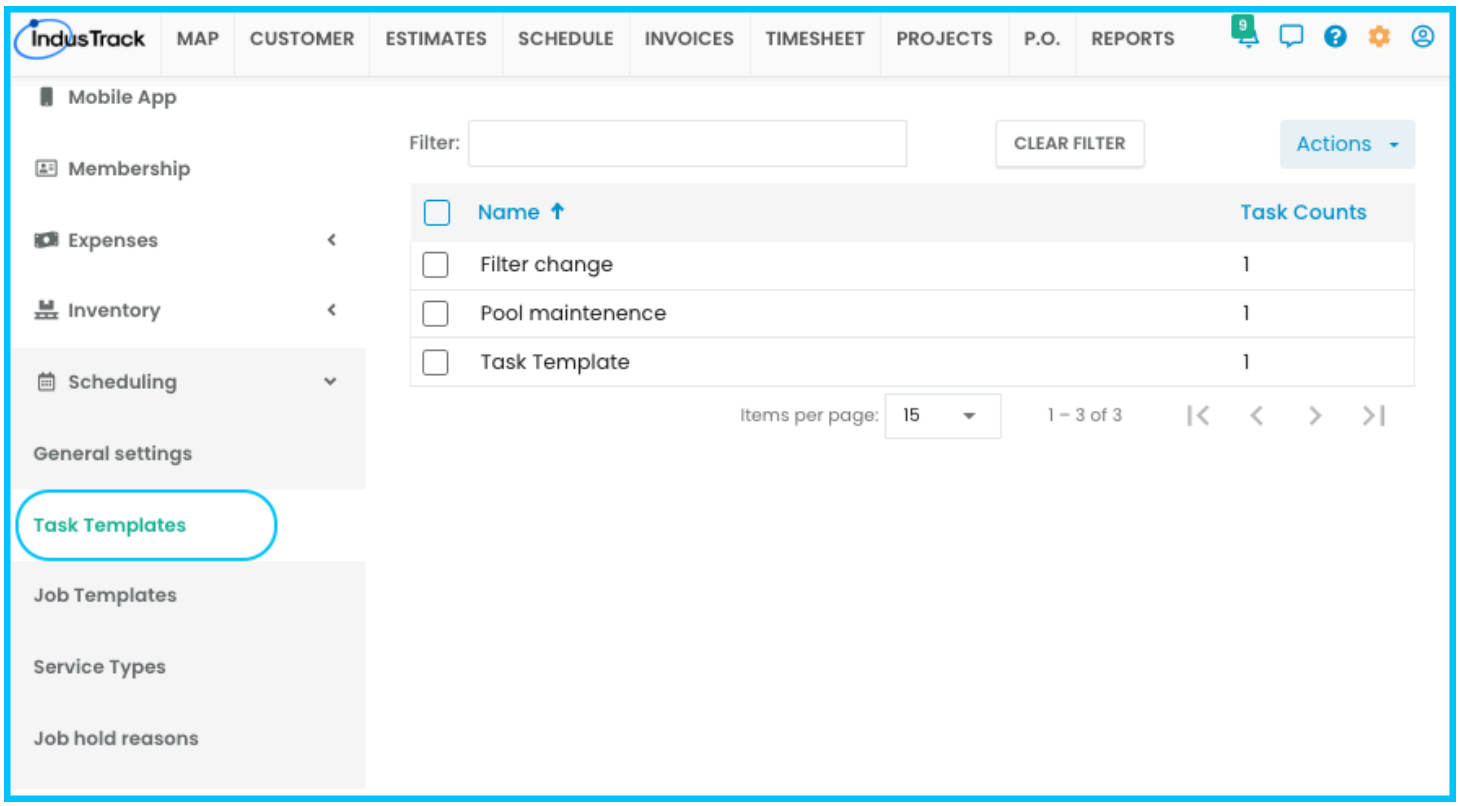
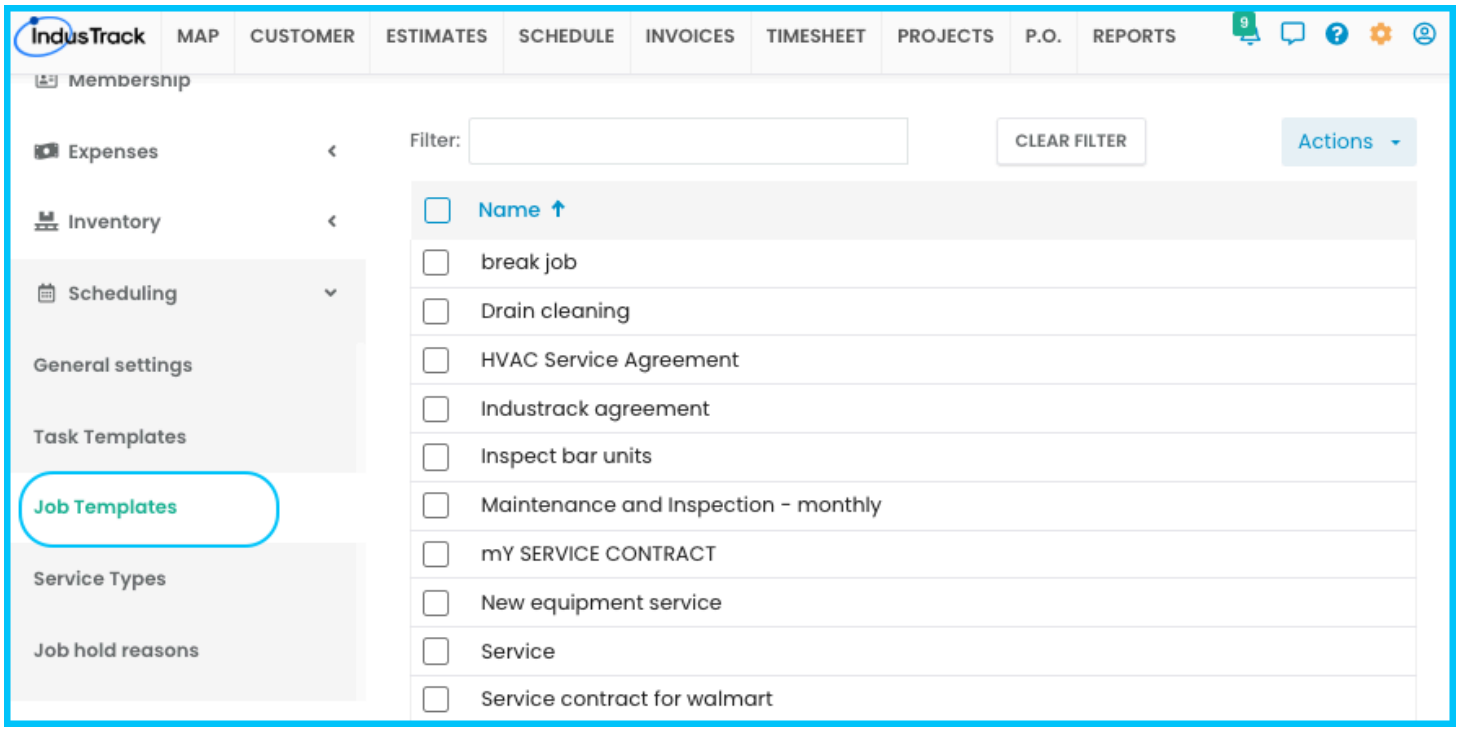
2. Task Templates

- Save frequently used **tasks** as templates.
- Use them to quickly add details when scheduling jobs.



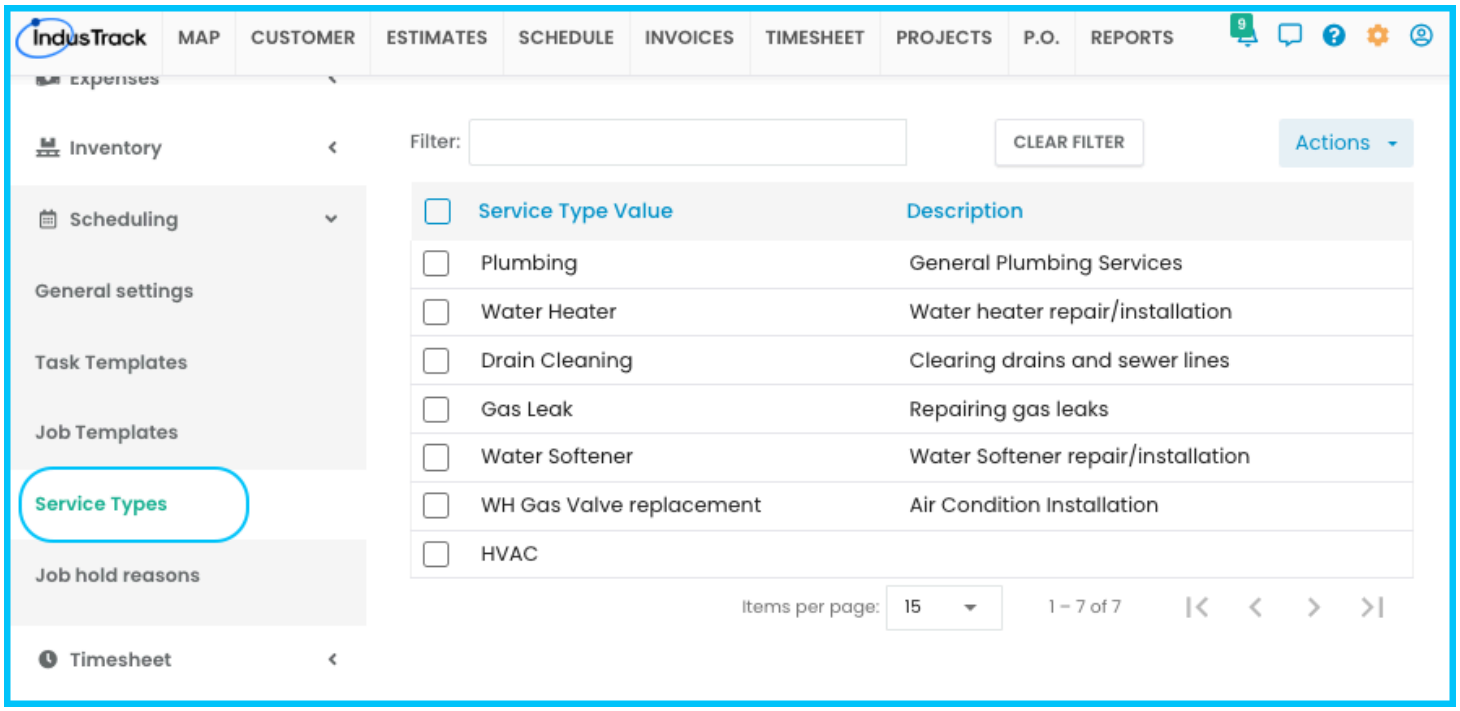
3. Job Templates

- Save commonly used **job structures** for easy reuse.
- Quickly load job templates to speed up scheduling and reporting.



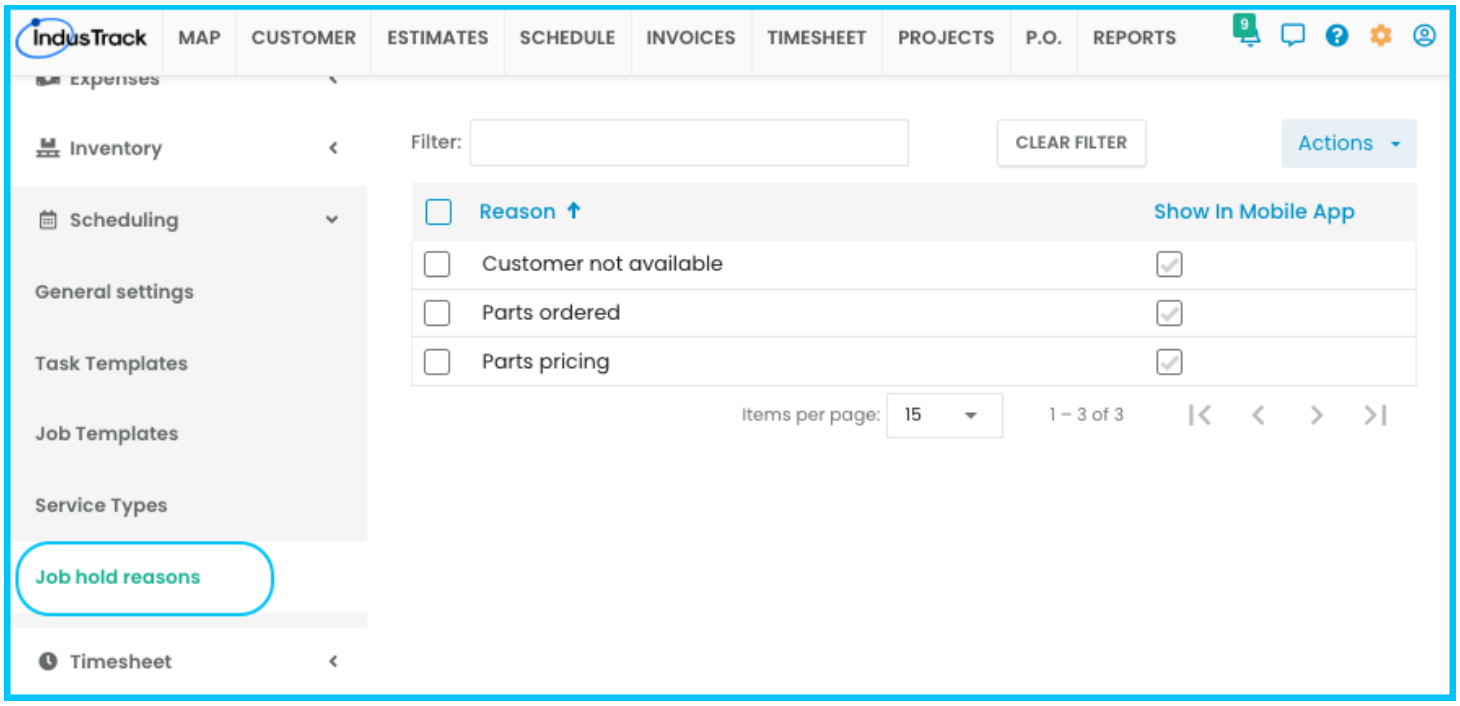
4. Service Types

- Create service categories for jobs (e.g., HVAC Repair, Electrical Installation).
- Helps with sorting reports and simplifying billing.



5. Job On Hold Reasons

- Define standard reasons for putting a job **on hold** (e.g., waiting for parts, customer request).
- Ensures consistency when pausing jobs.



This setup makes scheduling more efficient, helping you manage jobs, tasks, and field employees smoothly.
