Assign and Unassign Field Employees to Field Groups

Assign Field Employees to the Field Employee Groups. If there are employees who have been set up with Supervisor access, these could be added to the groups as well.

Assign Field Employees to a Group

Pull up the Add Field Employee Group window and assign the Group Name and Group Supervisor.

Go to the **Unassigned Employees section** and start assigning Field Employees.

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There are a number of ways by which Field Employees could be assigned to the group:

Assign Individual Field Employees

Find the name of the Field Employee from the list under Available Employee.

Hover over the name and click the arrow to its right. This will send the name to the Assigned Employees List.

Edit Field Employee Group	• 😧			Х
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If you have a long list of Field Employees to go through, use the Filter bar to quickly find an employee.

- Key in the Field Employee's name (or part of the name) on the Filter field.
- Click on Filter. The list will be narrowed down to the names that match your filter.

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Reminders							Peter Richards Aron Piper			
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Mobile App										

Assign Multiple Field Employees

Find each of the names of the Field Employees from the list under **Unassigned Employees**. Tick checkboxes as you go along.

Once you have selected all of the Field Employees, click on the Assign To Group button.

IndusTrack MAP	CUSTOMER ESTIMATES	SCHEDULE INVOICES	TIMESHEET SNOWTRACK	P.O.	REPORTS	1	191 <u>1</u> 🖓 🖓 🏟 🥹
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All of the names of the selected Field Employees will be moved under the Assigned Field Employees list.

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Assign All Available Employees

Tick the checkbox of the option **Available Employee**. Doing this will automatically tick the checkboxes of all the Field Employees listed under the Unassigned Employees.

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Click on the Assign To Group button.

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All of the names of the Field Employees will be moved under the Assigned Field Employees list.

Note: Unlike in the Include All option, all new Field Employees will not be automatically assigned to the Group. Their names will be listed under the Unassigned Employees.

IndusTrack MAP	CUSTON	IER ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			🏨 🖵 🕜 🌼 🙁
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Include All Field Employees

Tick the checkbox of the option **Include All**. Doing this will disable all other options for selecting the Field Employees, including the Assign to Group button.

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Save the Group. All Field Employees will all be moved under the Assigned Field Employees. Open the Group in edit mode to see this.

Note: With this option, all new Field Employees and reactivated ones will be automatically assigned to the Group once their profiles are created or activated.

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Unassign Field Employees from a Group

Open the Field Employee Group in edit mode.

Go to the **Assigned Employees section** and start unassigning field employees from the group.

IndusTrack MAP	CUSTOME	R ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			📸 🗅 \delta 🌣 (
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There are a number of ways by which Field Employees could be unassigned from a group:

Unassign Individual Field Employees

Find the name of the Field Employee from the list under Assigned Employees.

Hover over the name and click the delete icon (x) to its right. This will send the name to the Unassigned Employees List.

it Field Employee Group	0			
Group Name*	HVAC Service & Repair Tean	n		
Group Supervisor	Steven Newsome	~	Unassigned Employees	
Assigned Employees			Type to Filter	FILTE
UNASSIGN FROM GROUP			ASSIGN TO GROUP	_
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Peter Richards			U Willie Butler	
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IndusTrack MAP	CUSTOM	ER ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			🏨 🖓 😯 🙁
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Unassign Multiple Field Employees

Find each of the names of the Field Employees from the list under **Assigned Employees**. Tick checkboxes as you go along. Once you have selected all of the Field Employees, click on the **Unassign from Group** button.

IndusTrack MAP	CUSTOMER	R ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			🏨 📮 🛛 🌼 🕲
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All of the names of the selected Field Employees will be moved under the Unassigned Field Employees list.

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K Vehicle Tracking	<		Assigned Field Employees			Available Employee	Include All		:
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He Inventory	¢								
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Unassign All Assigned Employees

Tick the checkbox of the option **Assigned Field Employees.** Doing this will automatically tick the checkboxes of all the Field Employees listed under Assigned Employees.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			1914 🖵 😯 🌼 🙁
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Manage Employees		Jorji Group		/			Type to Filter	FILTER	3	÷
Manage Groups		All Hands on Deck	Assigned Employees				ASSIGN TO GROUP		All	:
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Click on the **Unassign from Group** button.

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Manage Groups		All Hands on Deck	Assigned Employees				ASSIGN TO GROUP		All	:
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All of the names of the Field Employees will be moved under the Unassigned Field Employees list.

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Manage Employees		Jorji Group	Assigned Employees			Type to Filter	TIETEK	3	:
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- Vohislo Tracking	,	HVAC Insatallation				Available Employee	🗖 Include All	All	:
	2	Show 25 🗸 entr	Assigned Field Employees			🗆 Willie Butler			Previous 1 Next
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Unassign Field Employees from an Include All Group

To be able to unassign a field employee or field employees from an **Include All** group, deselect the **Include All** option first.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			🌉 🖵 🛛 🌣 C
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💥 Field Employees	~	HVAC Service & Re	Group Supervisor	Charles Brown	1	~	Unassigned Employees		6 Drivers/Crews	
Manage Employees		Jorji Group					Type to Filter	FILTER	3	:
Manage Groups		All Hands on Deck	Assigned Employees				ASSIGN TO GROUP		All	:
Rev Vehicle Tracking	<	HVAC Insatallation	Assigned Field Employees			*	Available Employee	🗹 Include All	All	:
Reminders		Show 25 💙 entr	Peter Richards							Previous 1 Next
Reports	<		🗌 Dylan Frost				/	/		
Mobile App			Aron Piper							
Membership			🗆 Jorji Will							
🗮 Inventory	<		Charles Brown							
PriceBooks	<		Steven Newsome			*				
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• Timesheet	<							CLOSE SAVE		

Once the option has been deselected, unassign the field employee or employees the same way as instructed above.

IndusTrack MAP	CUSTOME	R ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			🌉 📮 8 🌼 @
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2 Office Users		Filter:	Group Name*	HVAC Insatallat	ion Team					
X Field Employees	×	HVAC Service & Re	Group Supervisor	Charles Brow	n	~	Unassigned Employees		6	:
Manage Employees		Jorji Group					Type to Filter	FILTER	з	÷
Manage Groups		All Hands on Deck	UNASSIGN FROM GROUP				ASSIGN TO GROUP		All	:
R Vehicle Tracking	K	HVAC Insatallation				•	Available Employee	Include All	All	:
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🗮 Inventory	¢		Steven Newsome			L				
PriceBooks	¢		Villie Butler			¥				
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Note: Ticking the Include All option again will send all of the Field Employees back to the Assigned Employees List.