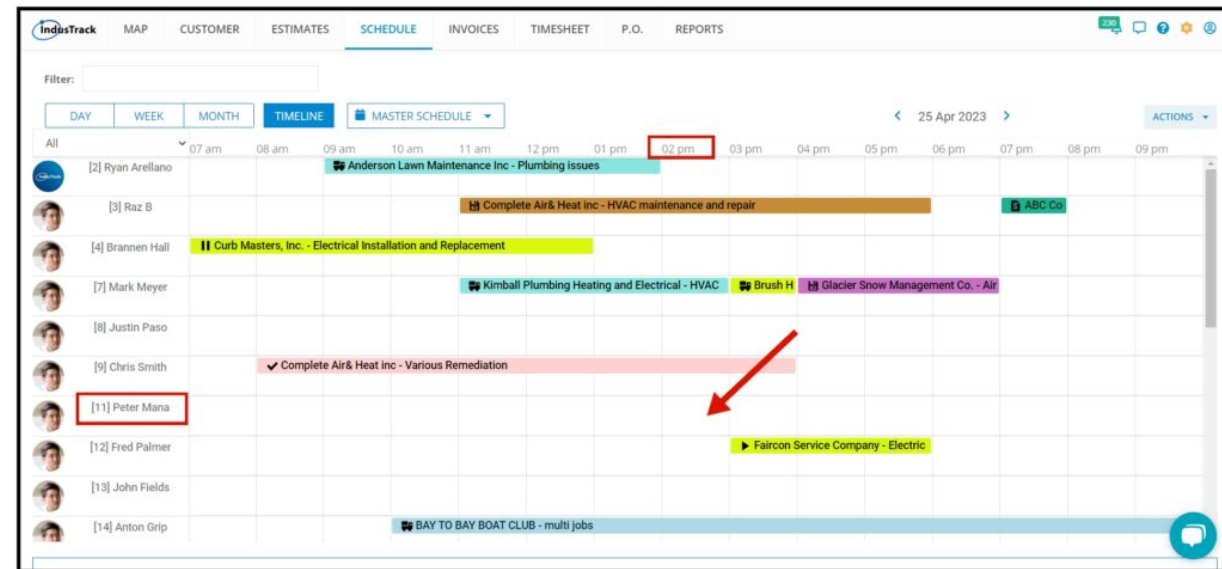


# Creating and Adding Jobs

There are three different ways that you can create jobs, convert an estimate into a job, create a job from the Actions tab, and create a job from a calendar.

## Create a Job from the Scheduling Grid

If you know when the job will be performed and who will be doing it, create the job directly from the default calendar, Timeline View. Just open the calendar to the date when the job will be done, and find the specific time and field employee. Double-click on it and the **Add New Job** window will open. The field employee and start date and time will already be filled in. This is discussed in detail in the section **Add a New Job**.

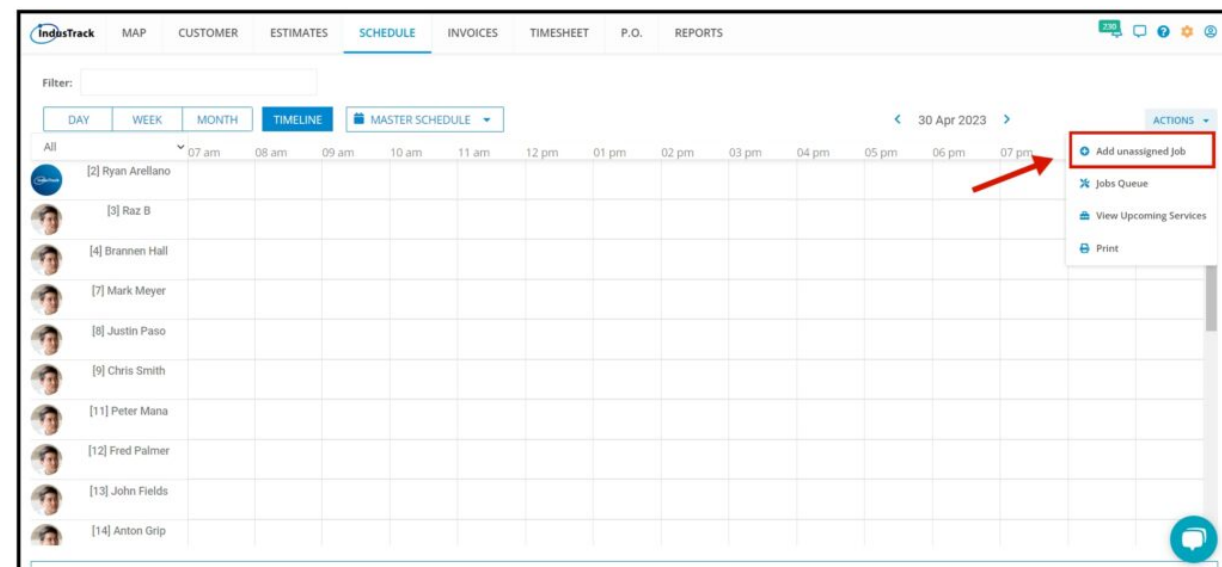


## Create a Job from the Actions Tab in the Schedule Module

From the Actions Tab in the Schedule Module, at the upper right-hand corner of the page, select **Add New Job**. This will bring up the **Add New Job** window. This is discussed in detail in the section **Add a New Job**.

This is particularly useful if you want to create a job that will not yet be assigned to a specific field employee or scheduled for a specific date. You can use this to create jobs for future scheduling. The job will be listed under **Jobs Queues**. You can update these jobs later when you are ready to assign them. More unassigned jobs are in the section **Jobs Queues**.

You can access the Add New unassigned Job window from the Actions tab from whatever **Calendar View**.



## Convert an Estimate into a Job

Converting an estimate to a job is the simplest way to create a job in IndusTrack. To learn the process of how to do this, go to the **Estimates module**. On the estimate module select and estimate> on the three dots> select convert to job.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

P.O.

REPORTS

Search

Date (from/to):

Choose a date From

Choose a date To

All

CLEAR FILTER

+ ADD NEW

MORE ACTIONS

<input type="checkbox"/>	Number	Company	Location	Description	Date ↓	Created by	Value	Status	
<input type="checkbox"/>		BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		04/20/2023	Raz Bajwa	\$40.00	Won	Viewed: <div>04/20/2023</div>
<input type="checkbox"/>		ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415		04/19/2023	Raz Bajwa	\$245.70	Invoice	<div>04/19/2023</div> <div>Edit</div>
<input type="checkbox"/>		ERICKSON ASPHALT SERVICES INC	12739 320th Ave, Princeton, MN, 55371	Fix all the AC units with proper fittings.	04/19/2023	Rabeea Anwar	\$3,470.00	Invoice	<div>Copy/Clone</div>
<input type="checkbox"/>		Curb Masters, Inc.	Curb3, 496 Farwell Ave, South St Paul, MN, 55075	I need new AC installed	04/11/2023	Rabeea Anwaar	\$1,187.09	Won	<div>04/18/2023</div> <div>Preview</div>
<input type="checkbox"/>	111222333	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	test tag	04/07/2023	Raz Bajwa	\$300.00	Won	<div>Print</div>
<input type="checkbox"/>		ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911		04/07/2023	Raz Bajwa	\$30.00	Draft	<div>Send</div> <div>Convert to Job</div>
<input type="checkbox"/>		Jill Paine	10700 west highway 55 270 270 270 270 270 270, suit 270, Plymouth, MN, 55441	trying it from the phone	04/06/2023	Rabeea Anwar	\$16,637.93	Won	<div>Convert to Invoice</div>
<input type="checkbox"/>		BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331	Fix leaking	04/04/2023	Raz Bajwa	\$400.00	Invoice	<div>Mark As Won</div>
<input type="checkbox"/>		ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911		04/04/2023	Raz Bajwa	\$30.00	Draft	<div>Mark As Lost</div>
<input type="checkbox"/>	22	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	SUITE 311	04/04/2023	Raz Bajwa	\$1,778.70	Invoice	<div>04/07/2023</div> <div>Mark As Draft</div>
<input type="checkbox"/>	7431-100	Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357	Various Remediations	04/04/2023	Raz Bajwa	\$300.00	Draft	<div>Delete</div> <div>View Invoice</div>

How to Add a New Job

Creating Jobs from the Add New Job window.

Add New Job

Job InfoEmployee(s) (0)Tasks (0)

Select Customer \*

Start typing to select addressBook

Job Description \*

Job Description

Job Status

Not Started

Notes

Job Number

Job Number

Service Type

Job Priority

None

Job Color

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Job Schedule

Start Date

4/30/2023

Time

10:02 AM

End Date

4/30/2023

Time

11:02 AM

Duration

1

h

0

m

RECURRANCE

CANCEL

SAVE JOB

DISPATCH NOW

Job Info

Add New Job

Job InfoEmployee(s) (0)Tasks (0)

Select Customer \*

Start typing to select addressBook

Job Description \*

Job Description

Job Status

Not Started

Notes

Job Number

Job Number

Service Type

Job Priority

None

Job Color

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Job Schedule

Start Date

4/30/2023

Time

10:02 AM

End Date

4/30/2023

Time

11:02 AM

Duration

1

h

0

m

RECURRANCE

CANCEL

SAVE JOB

DISPATCH NOW

This is where you will add your customer's information and basic job info such as the job number and start date and time.

Customer Info

Add New Job

Job InfoEmployee(s) (0)Tasks (0)

Select Customer \*Start typing to select addressBook

Job Description \*Job DescriptionJob StatusNot Started

Notes

Job NumberJob NumberService Type

Job PriorityNoneJob Color

Parts/Services/Equipment [0]Attachments [0]Forms [0]

Job Schedule

Start Date4/30/2023Time10:02 AMEnd Date4/30/2023Time11:02 AMDuration1 h 0 mRECURRENT

CANCELSAVE JOBDISPATCH NOW

Customer

On the **Select Customer field**, start typing the name of the customer into the field. As you begin typing the name, IndusTrack will begin looking in your address books for matching entries. When you see the one you are looking for in the list, click on it to select the customer.

Add New Job

Job InfoEmployee(s) (0)Tasks (0)

Select Customer \*Start typing to select addressBook

Job Description \*Job DescriptionJob StatusNot Started

Notes

Job NumberJob NumberService Type

Job PriorityNoneJob Color

Parts/Services/Equipment [0]Attachments [0]Forms [0]

Job Schedule

Start Date4/30/2023Time10:02 AMEnd Date4/30/2023Time11:02 AMDuration1 h 0 mRECURRENT

CANCELSAVE JOBDISPATCH NOW

Once the customer is selected, the contact info and address will be displayed. If there are any site notes that have been entered into the address book for the customer, these will also be displayed. If the customer has tags associated with it will be seen at the top.

Add New Job

Job Info Employee(s) (1) Tasks (0)

Tags: Assign COD Collection Geofence

This customer already has a job that is on hold and open estimate

Select Customer \* ABC Company

Company	ABC Company	Address
Contact Name	John Wilson	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415
Phone	6127464017	
E-mail	sales@industrack.com	

Select Service Location

Job Description \* Job Description Job Status Not Started

Notes

CANCEL SAVE JOB DISPATCH NOW

Parts/Services/Equipment [0]  
Existing Customer Equipment [0]  
Attachments [0]  
Forms [0]

ACTIONS

If an address book has not been created for the customer, you can scroll down at the very bottom of the customer list dropdown and click Create a New Customer, or will have to create one first before the job can be created for them. To create an address book for the customer, go to the Customer module.

Service Location

The **Select Service Location** field will come up if the customer's billing and service addresses are different or if there is more than one service location listed in their address book.

Leave the field empty if the job will be done at the address indicated on the customer information. Otherwise, select the service location from the list.

Add New Job

Select Customer \* ABC Company

Company	ABC Company	Address
Contact Name	John Wilson	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415
Phone	6127464017	
E-mail	sales@industrack.com	

Select Service Location

start type to search

3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911  
Location 2, 10700 West Highway 55 Suite 27, Plymouth, MN, 55441

Job Description \* Job Description Job Status Not Started

Notes

CANCEL SAVE JOB DISPATCH NOW

Parts/Services/Equipment [0]  
Existing Customer Equipment [0]  
Attachments [0]  
Forms [0]

Job Details

Add New Job

E-mail

sales@industrack.com

Select Service Location

Job Description \*

Job Description

Job Status

Not Started

Notes

Job Number

Job Number

Service Type

Job Priority

None

Job Color

Job Schedule

Start Date

4/30/2023

Time

10:30 AM

End Date

4/30/2023

Time

11:30 AM

Duration

1

h

0

m

RECURRANCE

CANCEL

SAVE JOB

DISPATCH NOW

Job Description

In this field, enter a simple description or name for the job. This will appear on the calendar together with the customer's name.

Add New Job

Company

ABC Company

Address

400 S 4th St, Suite 1000M,  
Minneapolis, MN, 55415

Contact Name

John Wilson

Phone

6127464017

E-mail

sales@industrack.com

Attachments [0]

Forms [0]

Select Service Location

Job Description \*

Various Remediation

Job Status

Not Started

Notes

Job Number

Job Number

Service Type

Job Priority

None

Job Color

Job Schedule

Start Date

4/30/2023

Time

10:30 AM

End Date

4/30/2023

Time

11:30 AM

Duration

1

h

0

m

RECURRANCE

CANCEL

SAVE JOB

DISPATCH NOW

Job Number

Add the job number series here.

Add New Job

Job Info

Employee(s) (0)

Tasks (0)

Select Customer \*

Start typing to select addressBook

ACTIONS

Job Description \*

Job Description

Job Status

Not Started

Notes

Job Number

ACU022

Service Type

Job Priority

None

Job Color

Job Schedule

Start Date

4/30/2023

Time

10:56 AM

End Date

4/30/2023

Time

11:56 AM

Duration

1

h

0

m

RECURRANCE

CANCEL

SAVE JOB

DISPATCH NOW

Service Type

Select the service type from the drop-down list. Service types are set up in the schedule settings sections.

Add New Job

Job InfoEmployee(s) (0)Tasks (0)

Select Customer \*

Start typing to select addressBook

Job Description \*

Job StatusNot Started

Notes

Job NumberACU022

Job PriorityNone

Job Schedule

Start Date4/30/2023Time10:56 AM

End Date4/30/2023Time11:56 AM

Duration1 h 0 m

Service Type

Job Color

Partners/Services/Equipment (0)

Attachments (0)

Forms (0)

None

01 Plans and Permits

01.1 Plans

01.2 Building Permits

01.3 City License

02 Site Work

02 Site Work

RECURRENT

CANCEL

SAVE JOB

DISPATCH NOW

Job Color

Select the color code representing the job. The colors are shown on the map. Job colors are set up in the schedule settings sections.

Add New Job

Job InfoEmployee(s) (0)Tasks (0)

Select Customer \*

Start typing to select addressBook

Job Description \*

Job StatusNot Started

Notes

Job NumberACU022

Job PriorityNone

Job Schedule

Start Date4/30/2023Time10:56 AM

End Date4/30/2023Time11:56 AM

Duration1 h 0 m

Service Type

Job Color

Partners/Services/Equipment (0)

Attachments (0)

Forms (0)

Cosmetic Work

Drain Cleaning

Electrical

Emergency

Gas Leak

Plumbing

RECURRENT

CANCEL

SAVE JOB

DISPATCH NOW

Start Date and Time, End Date and Time, Estimated Duration

Enter the **start date and time** of the job. Below that, enter the **end date and time**. Instead of entering the end date and time, you can instead fill in the **estimated duration** or the estimated time the job will take to finish. The end date and time will automatically fill in.

If you started creating the job by clicking in the calendar schedule grid, the start date and time will already be filled in. You can edit these.

Add New Job

E-mail: sales@industrack.com

Select Service Location:

Job Description \*:  Job Status: Not Started

Notes:

Job Number:  Service Type:

Job Priority: None Job Color:

**Job Schedule**

Start Date: 4/30/2023 Time: 11:14 AM

End Date: 4/30/2023 Time: 12:14 PM

Duration: 1 h 0 m ☐ RECURRENCE

CANCEL SAVE JOB DISPATCH NOW

Note that these times are for purposes of creating the schedule only and do not necessarily mean that these will be the actual job start and end times for the field employee. The job reports will show the actual times your field employee actually arrived at and departed from the customer's.

In the event that you do not yet have a specific date for the job that you are creating, you can leave the date and time blank and the job, when saved, will go into the Unassigned Job section.

### Job Status

Select from the options, not started, started, paused, complete, declined. The job status will be displayed as an icon on the calendar. **Usually, you don't have to set Job Status as when the field employee starts the job or does anything in the job in the mobile app the status will automatically change.**

If you are creating a job that has already been done so that you can create an invoice from it, select the status **Complete**.

Add New Job

Job Info Employees(s) (0) Tasks (0)

Select Customer \*: Start typing to select addressBook

Job Description \*:  Job Status:

Notes:

Job Number:  Service Type:

Job Priority: None Job Color:

**Job Schedule**

Start Date: 4/30/2023 Time: 11:44 AM

End Date: 4/30/2023 Time: 12:44 PM

Duration: 1 h 0 m ☐ RECURRENCE

CANCEL SAVE JOB DISPATCH NOW

### Job Priority

Set the job status to either low, medium, or high priority.



**Edit Job**

Contact Name: Kari Myse  
Phone: (321) 773-8434  
E-mail: heather@completeairairndheat.com

Address: Beach, FL, 32937

Existing Customer Equipment [0]  
Attachments [0]  
Forms [0]

Job Description: HVAC maintenance and rep.  
Job Status: Not Started

Notes: Please repair the leaking gas.

Job Number: [blank]  
Job Priority: **None** (dropdown menu open showing: None, High, Medium, Low)  
Service Type: Gas Leak  
Job Color: Gas Leak

Job Schedule: Start Date: 4/25/2023, Time: 11:00 AM  
End Date: 4/25/2023, Time: 6:00 PM  
Duration: 7 h 0 m

CANCEL SAVE JOB DISPATCH NOW

## Add Parts/Services/Equipment, Attachments, Existing Customer Equipment, and Forms

- Add Parts/Services/Equipment- Add parts, services, or equipment to the job from your inventory list.

**Add New Job**

Job Info Employee(s) (0) Tasks (0)

Tags: Assign

This customer already has a job that is on hold and open estimate

Select Customer: ABC Company

Company: ABC Company  
Contact Name: John Wilson  
Phone: 6127464017  
E-mail: sales@industrack.com

Address: 400 S 4th St, Suite 1000M, Minneapolis, MN, 55415

Select Service Location: 3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Parts/Services/Equipment [0] (dropdown menu open showing: 09090 - 01 Plans and Permits, 01.1 Plans, 01.2 Building Permits, 01.3 City License)

CANCEL SAVE JOB DISPATCH NOW

- **Existing Customer Equipment**– Will only be shown if the customer selected have existing equipment. You can also create one here if needed.

**Add New Job**

Job Info Employee(s) (1) Tasks (0)

Tags: Assign COD Collection Geofence

This customer already has a job that is on hold and open estimate

Select Customer: ABC Company

Company: ABC Company  
Contact Name: John Wilson  
Phone: 6127464017  
E-mail: sales@industrack.com

Address: 400 S 4th St, Suite 1000M, Minneapolis, MN, 55415

Select Service Location: 3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Parts/Services/Equipment [1]  
Existing Customer Equipment [0]  
Attachments [0]  
Forms [0]

Existing Customer Equipment: Not defined, Compound Pressure Gauge Wika 9831538  
CREATE A NEW CUSTOMER EQUIPMENT

CANCEL SAVE JOB DISPATCH NOW

- **Attachments**– If there is any other info you want to add to the job you can also add in here URLs, Files, and Purchase Order.



Add New Job

Job Info Employee(s) (1) Tasks (0)

Tags: Assign COD Collection Geofence

This customer already has a job that is on hold and open estimate

Select Customer \* ABC Company

Company ABC Company Address 400 S 4th St, Suite 1000M, Minneapolis, MN, 55415

Contact Name John Wilson Phone 6127464017 E-mail sales@industrack.com

Select Service Location 3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Contact Name 3rd location Phone (971) 226-9663 Service 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Attachments [0]

URL

Attachments

Add a File Choose File No file chosen

Purchase Order CREATE

CANCEL SAVE JOB DISPATCH NOW

- **Forms** – Mobile forms are pre-made, select the form/s you wanted to add to the job.
- **Form Trigger** – select when the form should pop up when the field employee does the job.

Add New Job

Job Info Employee(s) (1) Tasks (0)

Tags: Assign COD Collection Geofence

This customer already has a job that is on hold and open estimate

Select Customer \* ABC Company

Company ABC Company Address 400 S 4th St, Suite 1000M, Minneapolis, MN, 55415

Contact Name John Wilson Phone 6127464017 E-mail sales@industrack.com

Select Service Location 3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Contact Name 3rd location Phone (971) 226-9663 Service 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Forms [0]

Form Fertilizer Monitoring F Select form trigger ADD

Fertilizer Monitoring Report

INSPECTION TEST

Lawn Maintenance Work order

New Customer Referral

Street Sweeping

Terms and Conditions Residential

Final Checklist

Rough-in Checklist

Underground Checklist

Customer Approval

new form element

CANCEL SAVE JOB DISPATCH NOW

Add New Job

Job Info Employee(s) (1) Tasks (0)

Tags: Assign COD Collection Geofence

This customer already has a job that is on hold and open estimate

Select Customer \* ABC Company

Company ABC Company Address 400 S 4th St, Suite 1000M, Minneapolis, MN, 55415

Contact Name John Wilson Phone 6127464017 E-mail sales@industrack.com

Select Service Location 3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Contact Name 3rd location Phone (971) 226-9663 Service 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911

Forms [0]

Form Terms and Conditions Select form trigger ADD

Select form trigger

Job Start

Job Complete

Task Start

Task Complete

Task Incomplete

Job Hold

CANCEL SAVE JOB DISPATCH NOW

## Employee(s)

Select the field employee(s) or employee group(s) the job will be assigned to.

If you started creating the job by clicking in the Timeline View schedule grid, the field employee will already be assigned. You can add more field employees to the job or remove the crew previously selected.

If the job is created from a custom calendar, only field employees and employee groups that are assigned to the custom calendar will be on the drop-down list.

If in the event that you don't know who the job will be assigned to at the time you create the job, you can leave the employee list empty and the job will go into the Unassigned Job section.

Edit Job

Job Info **Employee(s) (1)** Tasks (0) Job history Field Notes

Add Crew

Raz B

[5] Raz B

Duration 0 h 0 m

CANCEL SAVE JOB DISPATCH NOW

## Add Crew

1. Click on the **Add Crew Field**.
2. Tick the checkbox to the left of the field employee's or group's name. As you tick, the name will already be added to the list. For an employee group, all the crew assigned to that group will be added to the list individually.
3. Click anywhere on the window to close the list.

Edit Job

Job Info **Employee(s) (2)** Tasks (0) Job history Field Notes

Add Crew

Multiple Selected [2]

Filter

☐ {Group1 - [0] All}

☐ {Group1 - [7] Always Together}

☒ {Group1 - [0] Install Group}

☐ {Group1 - [4] Journeyman }

☐ {Group1 - [4] Plumbing Group}

☒ [2][5] Ryan Arellano

☐ [3][5] Raz B

☐ [4] Brannen Hall

☐ [7][5] Mark Meyer

Duration 0 h 0 m

Duration 0 h 0 m

CANCEL SAVE JOB DISPATCH NOW

## Remove a crew

1. To delete a field employee's name, click on the **Delete icon (X)** below the crew's name.
2. To delete all of the crew on the list, click the **Clear List button**.

Edit Job

Job Info

Employee(s) (2)

Tasks (0)

Job history

Field Notes

Add Crew

Multiple Selected [2]

[5] Ryan Arellano

Duration 0 h 0 m

John Fields

Duration 0 h 0 m

CANCEL

SAVE JOB

DISPATCH NOW

After adding all the info, you can either SAVE the job or DISPATCH NOW.

**Saving the job** means you just saved the job and the field employee assigned to it won't get a notification in his mobile app.

**Dispatching the Job** means the job was dispatched to the field employee assigned to it, the field employee/s will get notified in his mobile app that a job was assigned to him.



