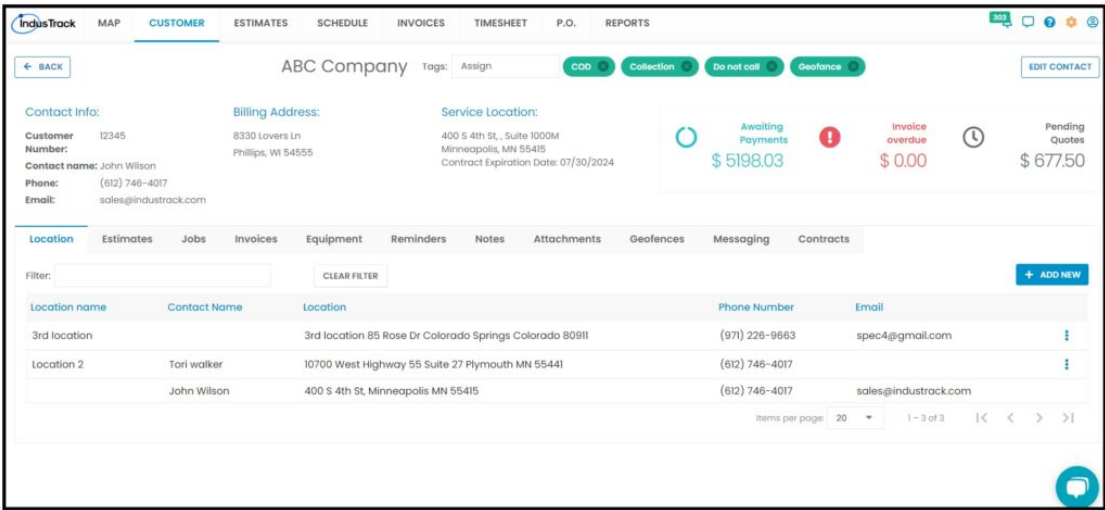


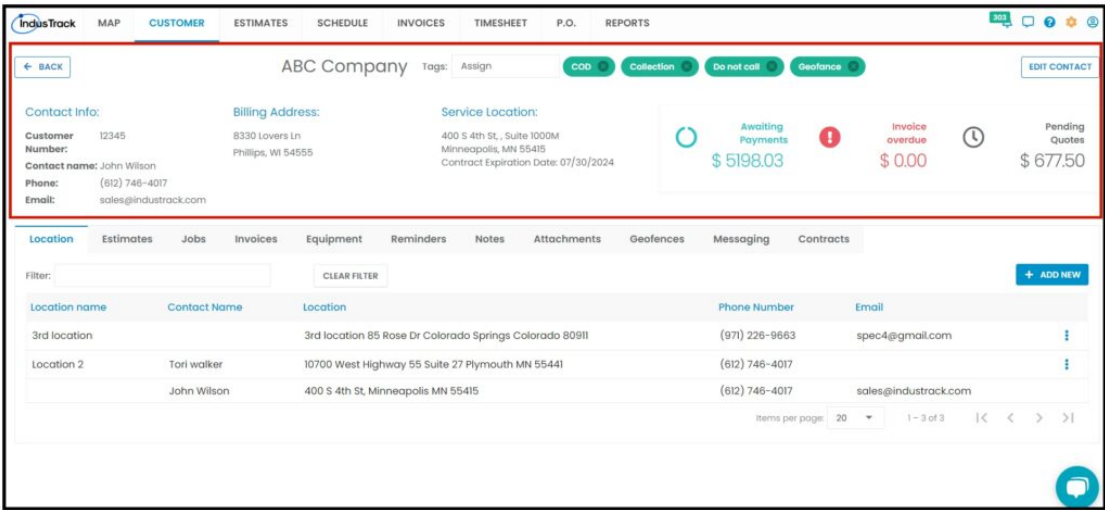
Customer Profile Navigation

Each customer added to your IndusTrack system will have an **Address Book** once their profile is created.

The **Customer Profile** will contain their [profile](#) and records. From their Profile, both the Field Employees and Office Users can review their previous availments, create and manage services and update their information in a single location. Clients can even access a number of the modules from their mobile via the Client Portal, smoothing the entire customer service experience.



Customer's Profile and Dashboard



The upper half of the customer’s profile is the Dashboard. The company’s name will be at the top of the Dashboard.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

← BACK **ABC Company** Tags: Assign COD Collection Do not call Geofence EDIT CONTACT

Contact Info: Customer Number: 12345, Contact name: John Wilson, Phone: (612) 746-4017, Email: sales@industrack.com

Billing Address: 8330 Lovers Ln, Phillips, WI 54555

Service Location: 400 S 4th St., Suite 1000M, Minneapolis, MN 55415, Contract Expiration Date: 07/30/2024

Awaiting Payments: \$ 5198.03, Invoice overdue: \$ 0.00, Pending Quotes: \$ 677.50

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Filter: CLEAR FILTER + ADD NEW

Location name	Contact Name	Location	Phone Number	Email
3rd location		3rd location 85 Rose Dr Colorado Springs Colorado 80911	(971) 226-9663	spec4@gmail.com
Location 2	Tori walker	10700 West Highway 55 Suite 27 Plymouth MN 55441	(612) 746-4017	
	John Wilson	400 S 4th St, Minneapolis MN 55415	(612) 746-4017	sales@industrack.com

Items per page: 20 1 - 3 of 3 < > > |

The customer's details when their profile was created will be indicated on the Dashboard, just below the company name. This includes contact information, billing address, and service location.

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← BACK **ABC Company** Tags: Assign COD Collection Do not call Geofence EDIT CONTACT

Contact Info: Customer Number: 12345, Contact name: John Wilson, Phone: (612) 746-4017, Email: sales@industrack.com

Billing Address: 8330 Lovers Ln, Phillips, WI 54555

Service Location: 400 S 4th St., Suite 1000M, Minneapolis, MN 55415, Contract Expiration Date: 07/30/2024

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Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Filter: CLEAR FILTER + ADD NEW

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Location 2	Tori walker	10700 West Highway 55 Suite 27 Plymouth MN 55441	(612) 746-4017	
	John Wilson	400 S 4th St, Minneapolis MN 55415	(612) 746-4017	sales@industrack.com

Items per page: 20 1 - 3 of 3 < > > |

To the right of the Dashboard, you will see the status of the customer's accounts. We have the dollar value of [estimates](#) and [invoices](#) categorized as overdue, and current.

- **Pending Quotes** – These are [estimates](#) that have been prepared or sent to the customer but no action has been taken.
- **Invoice Overdue** – These are [invoices](#) that have gone over the approved payment terms but have not been paid.
- **Awaiting Payments** – These are invoices that are not yet paid but are still within the payment terms.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

← BACK **ABC Company** Tags: Assign COD Collection Do not call Geofence EDIT CONTACT

Contact Info: Customer Number: 12345, Contact name: John Wilson, Phone: (612) 746-4017, Email: sales@industrack.com

Billing Address: 8330 Lovers Ln, Phillips, WI 54555

Service Location: 400 S 4th St., Suite 1000M, Minneapolis, MN 55415, Contract Expiration Date: 07/30/2024

Awaiting Payments: \$ 5198.03, Invoice overdue: \$ 0.00, Pending Quotes: \$ 677.50

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Filter: CLEAR FILTER + ADD NEW

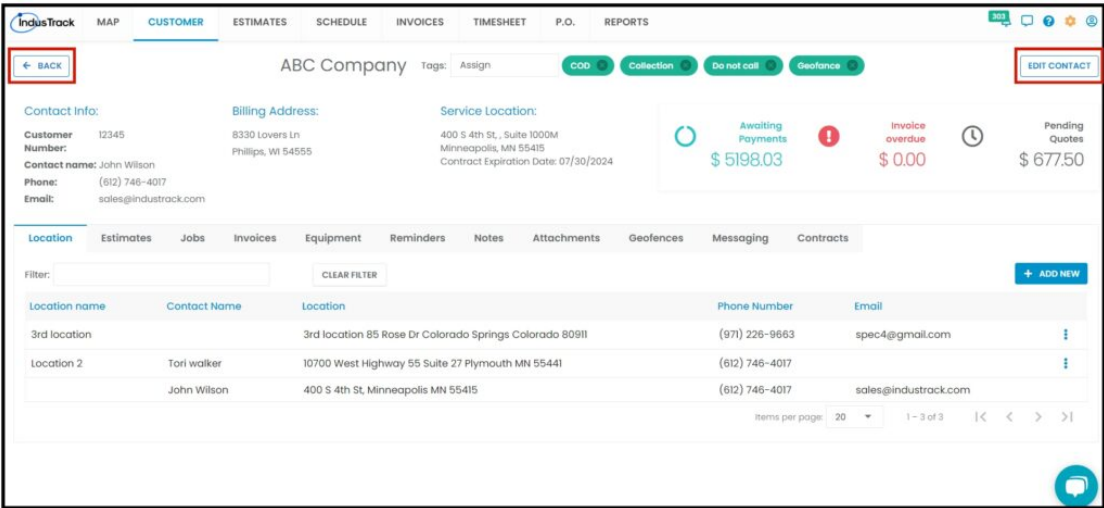
Location name	Contact Name	Location	Phone Number	Email
3rd location		3rd location 85 Rose Dr Colorado Springs Colorado 80911	(971) 226-9663	spec4@gmail.com
Location 2	Tori walker	10700 West Highway 55 Suite 27 Plymouth MN 55441	(612) 746-4017	
	John Wilson	400 S 4th St, Minneapolis MN 55415	(612) 746-4017	sales@industrack.com

Items per page: 20 1 - 3 of 3 < > > |

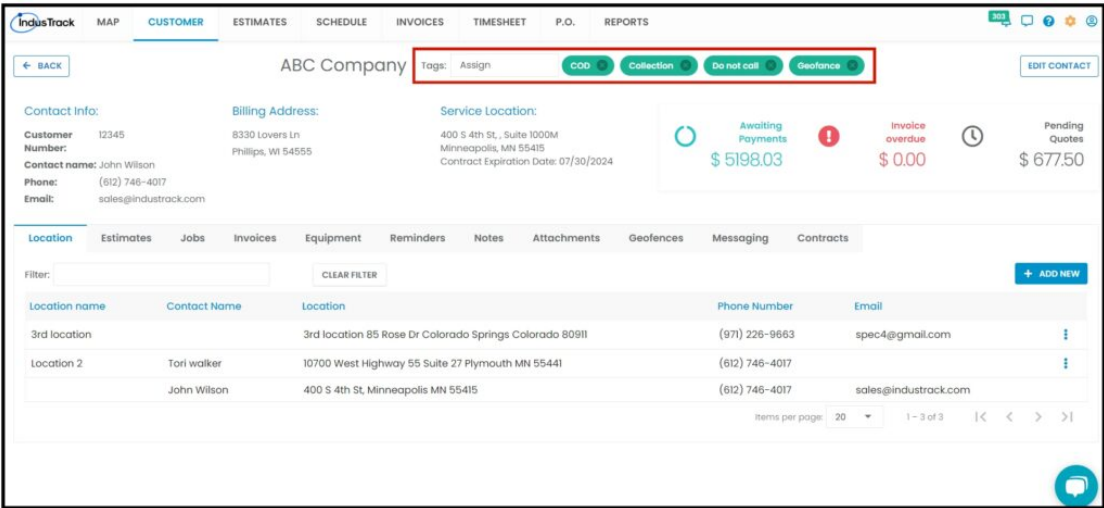
7/24/23, 4:46 AM

Knowledgebase

Use the **Back** button to go back to the Customer Profile list and the **Edit Contact** button to enable the editor page of the customer profile.

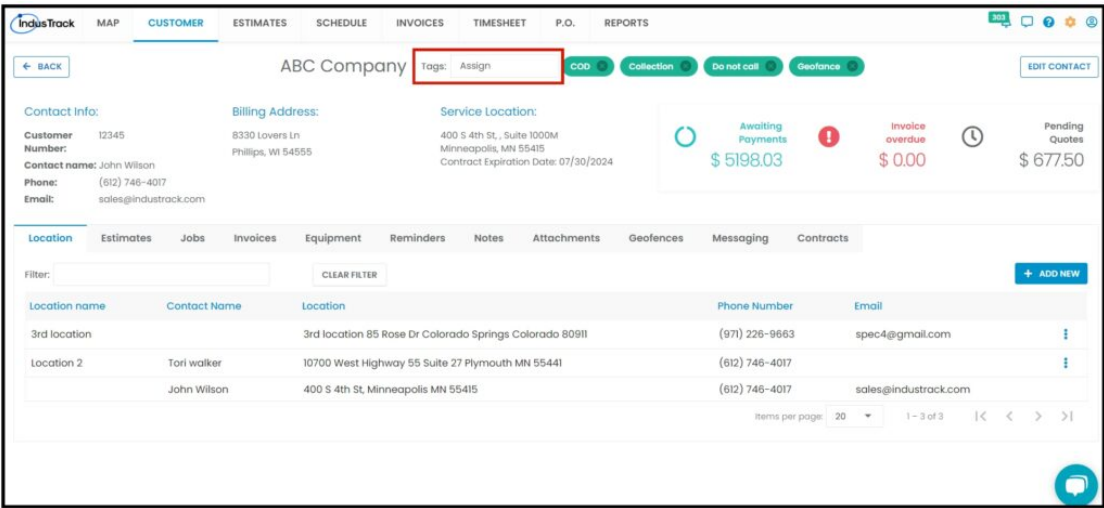


Assign **Tags** to the customer profile by selecting from the available tags. Create a tag appropriate for the account if needed. [Tags can be set up from the company settings as well.](#)

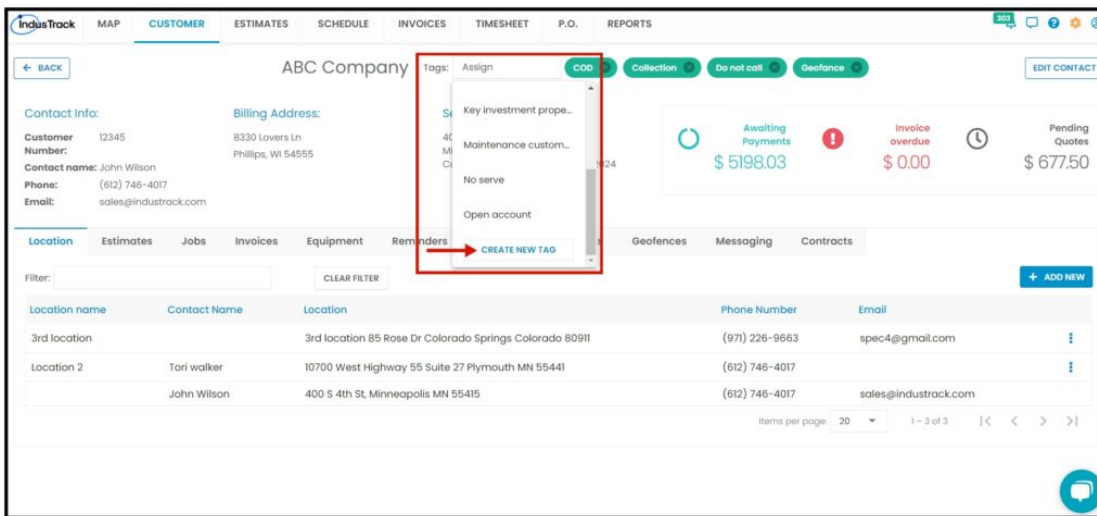


How to Create a Client Tag from the Customer Profile

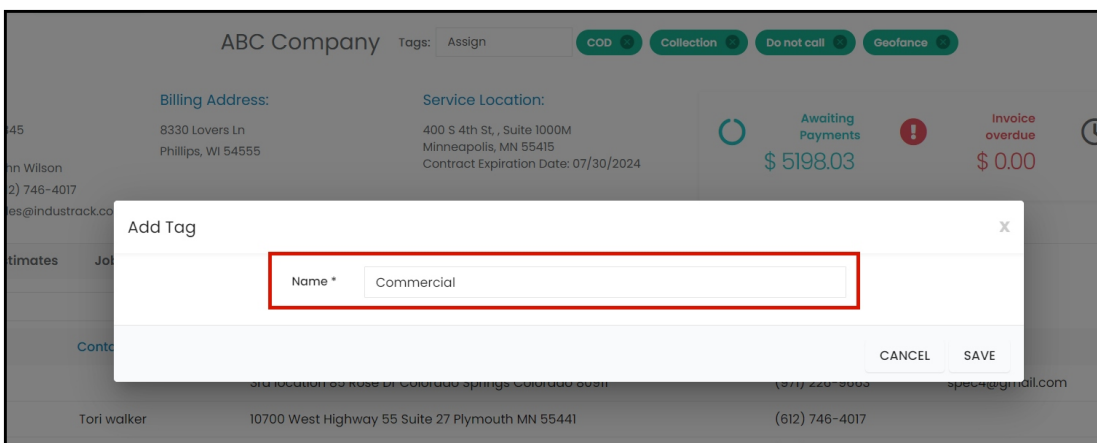
Click the tags field.



Scroll down to the bottom of the [Tags List](#) and click **Create New Tag**.



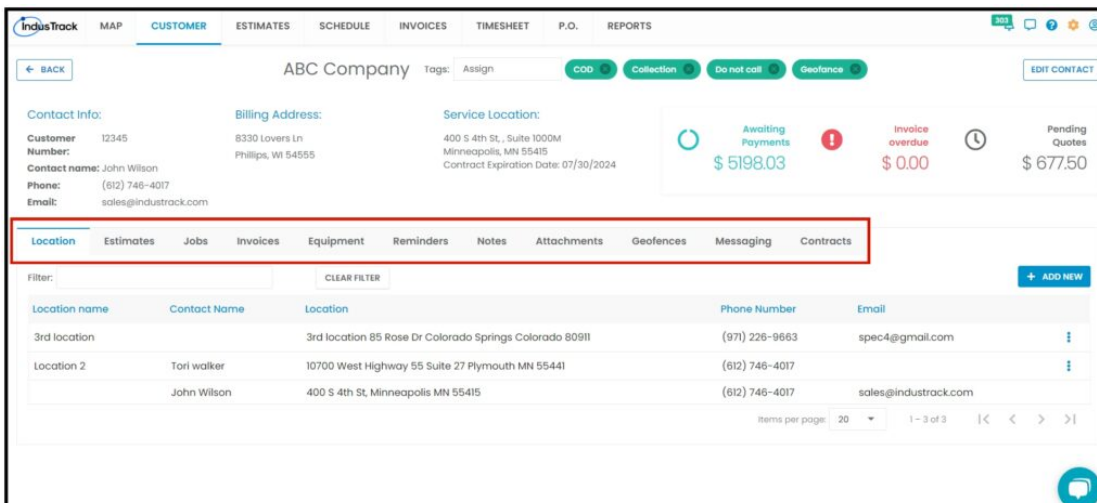
Key in the Tag name on the field and **Save**.



Manage Your Customer in One Place

At the bottom half of the Address Book, you will find the following tabs: location, estimates, jobs, invoices, equipment, reminders, notes, attachments, geofences, messaging, and contracts.

There is no need to dig deep into piles of paper or computer files to retrieve the customer's information, records, and documents. No need to have multiple software, too. You can access, create and manage all of these from the customer's profile. IndusTrack makes it easy for you.



Below are brief descriptions and functions of the different tabs. To learn more about a specific tab, go to the dedicated article.

Location

Under the [Location tab](#) is a listing of all of the customer's service locations. The billing address (if different from the service address) is not listed here. If you want to add the billing address as a service location too, you will have to add it as one.

You can also [create additional service locations](#) for the customer.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

ABC Company Tags: Assign COB Collection Do not call Geofence EDIT CONTACT

Contact Info:
 Customer Number: 12345
 Contact name: John Wilson
 Phone: (612) 746-4017
 Email: sales@industrack.com

Billing Address:
 8330 Lovers Ln
 Phillips, WI 54555

Service Location:
 400 S 4th St., Suite 1000M
 Minneapolis, MN 55415
 Contract Expiration Date: 07/30/2024

Awaiting Payments: \$5198.03
 Invoice overdue: \$0.00
 Pending Quotes: \$677.50

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Filter: CLEAR FILTER + ADD NEW

Location name	Contact Name	Location	Phone Number	Email
3rd location		3rd location 85 Rose Dr Colorado Springs Colorado 80911	(971) 226-9663	spec4@gmail.com
Location 2	Tori walker	10700 West Highway 55 Suite 27 Plymouth MN 55441	(612) 746-4017	
	John Wilson	400 S 4th St, Minneapolis MN 55415	(612) 746-4017	sales@industrack.com

Items per page: 20 1 - 3 of 3

Estimates

Under the [Estimate tab](#) of the [Customer Profile](#), you will find the listing of all the **Estimates** that have been prepared for the customer.

You can also create and manage estimates for the customer from here. Go to the [Estimates module](#) for a detailed discussion of the **Estimates**.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

ABC Company Tags: Assign COB Collection Do not call Geofence EDIT CONTACT

Contact Info:
 Customer Number: 12345
 Contact name: John Wilson
 Phone: (612) 746-4017
 Email: sales@industrack.com

Billing Address:
 8330 Lovers Ln
 Phillips, WI 54555

Service Location:
 400 S 4th St., Suite 1000M
 Minneapolis, MN 55415
 Contract Expiration Date: 07/30/2024

Awaiting Payments: \$5198.03
 Invoice overdue: \$0.00
 Pending Quotes: \$677.50

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Search: Q 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"/>	1230	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	First Year Contract	06/09/2023	Rabeea Anwaar	\$649.60	Assigned
<input type="checkbox"/>	1223	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		06/02/2023	Raz Bajwa	\$415.00	draft Viewed: 06/02/2023
<input type="checkbox"/>	1222	ABC Company	Location 2, 10700 West Highway 55 Suite 27, Plymouth, MN, 55441	new	06/01/2023	Rabeea Anwar	\$2.63	Scheduled
<input type="checkbox"/>	1221	ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	new install	05/31/2023	Rabeea Anwaar	\$102.90	Viewed: 05/31/2023
<input type="checkbox"/>	101	ABC	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	Replace AC units on all fi	06/21/2022	Rabeea	\$3,019.60	Viewed

Jobs

The [Jobs tab](#) contains a listing of all the **Jobs** that have been scheduled for the customer.

From the Jobs tab, you can create job schedules for the customer. You can also manage those that have already been created for them. Go to the [Schedule module](#) for a detailed discussion of **Jobs**. The process is the same whether the feature is accessed from the customer's address book or the Schedule module.

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ABC Company

Tags: Assign

COO

Collection

Do not call

Geofence

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number: 12345

8330 Lovers Ln
Phillips, WI 54555

400 S 4th St., Suite 1000M
Minneapolis, MN 55415
Contract Expiration Date: 07/30/2024

Awaiting Payments
\$ 5198.03

Invoice overdue
\$ 0.00

Pending Quotes
\$ 677.50

Location

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Notes

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Filter:

Location: Not Selected

Date: Choose a date From

Choose a date To

CLEAR FILTER

+ ADD NEW

Date	Time	Number	Field Employee	Description	Location	Status	Assigned Tasks	Completed Tasks
01/01/2048	8:30 am		Anton Grip	123	Location 2 - 10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA	Not Started	1	0
01/01/2047	8:30 am		Anton Grip	123	Location 2 - 10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA	Not Started	1	0
01/01/2046	8:30 am		Anton Grip	123	Location 2 - 10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA	Not Started	1	0
01/01/2045	8:30 am		Anton Grip	123	Location 2 - 10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA	Not Started	1	0
01/01/2044	8:30 am		Anton Grip	123	Location 2 - 10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA	Not Started	1	0
01/01/2043	8:30 am		Anton Grip	123	Location 2 - 10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA	Not Started	1	0
01/01/2042	8:30 am		Anton Grip	123	Location 2 - 10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA	Not Started	1	0

Invoices

The **Invoice tab** contains a listing of all the client's **Invoices** that have been issued.

You can also create and manage invoices for the customer from this tab.

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ABC Company

Tags: Assign

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Collection

Do not call

Geofence

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number: 12345

8330 Lovers Ln
Phillips, WI 54555

400 S 4th St., Suite 1000M
Minneapolis, MN 55415
Contract Expiration Date: 07/30/2024

Awaiting Payments
\$ 5198.03

Invoice overdue
\$ 0.00

Pending Quotes
\$ 677.50

Location

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Invoices

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Reminders

Notes

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Contracts

Search:

Date (from/to):

Choose a date From

Choose a date To

All

Unpaid

Overdue

Paid

CLEAR FILTER

+ ADD NEW

More Actions

<input type="checkbox"/>	Date ↓	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/>	06/02/2023	3482		2837	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$505.78	\$505.78	Unpaid
<input type="checkbox"/>	05/30/2023	3477			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$0.00	\$329.00	Paid
<input type="checkbox"/>	05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid Viewed: 05/30/2023
<input type="checkbox"/>	05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	Unpaid

Equipment

The **Equipment Tab** contains a listing of all the equipment/hardware that the customer has purchased from you or any equipment from third-party vendors that you track.

The list includes the equipment type and model, the manufacturer, warranty details, attachments, and description. For ease of monitoring, the list includes the number of months left before warranty expiration.

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ABC Company

Tags: Assign

COB

Collection

Do not call

Geofence

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number: 12345

Contact name: John Wilson

Phone: (612) 746-4017

Email: sales@industrack.com

8330 Lovers Ln

Phillips, WI 54555

400 S 4th St., Suite 1000M

Minneapolis, MN 55415

Contract Expiration Date: 07/30/2024

Awaiting Payments

\$ 5198.03

Invoice overdue

\$ 0.00

Pending Quotes

\$ 677.50

Location

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Filter:

Location: Not Selected

Parts

Equipment

CLEAR FILTER

+ ADD NEW EQUIPMENT

Name	Manufacturer	Model	Serial Number	Install Warranty	Location	Notes
Rtu	Carrier	ABC			ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Test equipment note
Compound Pressure Gauge	Wika	9831538			3rd location - 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911, United States	
Test	Raz	1234	1234		ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Noted for equipment, change filter. Equipment more test 8:25
AC condenser	AC condenser	AC condenser	04	04/01/2025	ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	

Reminders

In the [Reminders Tab](#), set up reminders for an office user to take action on sort of a to-do list with notifications. When the due date arrives, the reminder will appear in the [notifications](#) for that user.

The **Reminders List** will contain different reminders that have already been created.

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ABC Company

Tags: Assign

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Collection

Do not call

Geofence

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number: 12345

Contact name: John Wilson

Phone: (612) 746-4017

Email: sales@industrack.com

8330 Lovers Ln

Phillips, WI 54555

400 S 4th St., Suite 1000M

Minneapolis, MN 55415

Contract Expiration Date: 07/30/2024

Awaiting Payments

\$ 5198.03

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Pending Quotes

\$ 677.50

Location

Estimates

Jobs

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Equipment

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Notes

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Contracts

Filter:

Date: Choose a date From: Choose a date To:

CLEAR FILTER

+ ADD NEW

Created Date	Due Date	Subject	Description	Location	Status
06/12/2023	6/13/2023	Contract renewal	Call the client to discuss the renewal	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911, United States	Pending

Show 10 entries

Previous 1 Next

Notes

Under the [Notes Tab](#), you can add entries about communications with the customer or any other jottings or records you need to make about the account.

You can also create **site notes**. These are notes that field employees can see in the **IndusTrack** mobile app for every job scheduled for the customer. These can be very useful if there are things like gate codes to access the property or parking area assignments.

Notes

Date	Location	Notes	User	Job #	Task Name
01/18/2023	ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	This is raz Notes. Fix the leak. Customer was very happy. 5 stars for me		2080	Fix Toilet
02/02/2023	ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Test nots		2089	Test jobs
02/02/2023	ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Water pressure was not good		2092	This for jeff
02/02/2023	ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	These are raz notes. I pet the dog		2091	The future job Erick

Attachments

Under the [Attachments tab](#), upload and save files and documents such as pictures, site maps, special install manuals or any additional contract with the customer. Attachments can also be made visible on the field employees' **IndusTrack mobile**.

Attachments

Date	Location	Job #	Task Name	Employee Name	File Name	Notes
01/18/2023		2080	Default	Raz B	IMG_1674069568011.jpg	
01/18/2023		2080	Default	Raz B	IMG_1674069575487.jpg	
02/02/2023		2089		Raz B	IMG_1675347398118.jpg	
02/02/2023		2082		Raz B	IMG_1675366944572.jpg	
02/02/2023		2091		Raz B	IMG_1675363966791.jpg	
02/02/2023		2091		Raz B	IMG_1675363973486.jpg	
02/02/2023		2090	Default	Raz B	IMG_1675366547366.jpg	
02/09/2023		2094	Default	Raz B	IMG_1675965771220.jpg	

Geofences

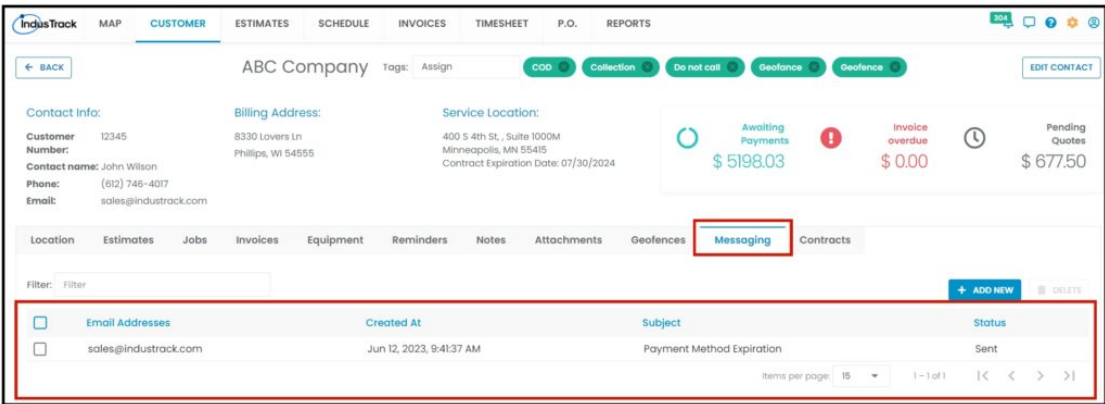
The [Geofences tab](#) is where you can add a custom-sized or hand-drawn Geofence. This is what will show up on the map when you [overlay geofences](#). It is also what will be used to trigger the [Geofence Enter and Exit alerts](#).

Geofences

Name	Enter Location	Exit Location

Messaging

Send an email to the customer via IndusTrack. Any message sent will be added to the Message listing under the [Messaging Tab](#).



Contracts

From the Contracts tab, create new **Service Agreements** and **Memberships** unique to the client.

