

# Customer Profile: Manage Attachments

Under the **Attachments** tab of the Customer's Profile, upload and save things 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**.

The screenshot shows the IndusTrack interface for a customer profile. The top navigation bar includes tabs like MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, SNOWTRACK, P.O., and REPORTS. The main header shows the customer name '5 Dollar Pizza' and a 'multi-location' tag. Below this, there's a section for 'Contact Info', 'Billing Address', and 'Service Location'. To the right, there are three status indicators: 'Awaiting Payments \$0.00', 'Invoice overdue \$0.00', and 'Pending Quotes \$0.00'. The 'Attachments' tab is selected and highlighted with a red box. It shows a list of three attachments with columns for Date, Location, Job #, Task Name, Employee Name, File Name, and Notes. The attachments are: 10/27/2022, Site Map, elaineg@industack.com, ElectricalMapofstore.png; 10/27/2022, Genset's manual, elaineg@industack.com, Manual.png; and 10/27/2022, The owner is requesting an assessment of their 10-year-old genset, elaineg@industack.com, Gensetforassessment.png. There are also buttons for 'Filter', 'Clear Filter', 'Add New', and 'Show 10 entries'.

The **Attachments List** contains a listing of all the different documents or files relevant to your client's account or associated with a job or task that have been uploaded via the page. It also includes a link to the attached document. Click on this to open the file.

The details that are shown on the listing are:

- Date when the file was attached
- The Service Location where the attachment applies to
- The Job # associated with the attachment
- The Task associated with the job
- The email of the one who uploaded the file.
- The hyperlinked file name. Clicking on this will open the document/file in a new tab.
- Any notes that have been entered

This screenshot is identical to the one above, showing the IndusTrack Customer Profile page with the Attachments tab selected. It displays the same contact information, status indicators, and a list of three attachments: 'ElectricalMapofstore.png', 'Manual.png', and 'Gensetforassessment.png'. The Attachments tab is highlighted with a red box.

Click on the table header to **Sort** the list alphabetically according to the selected header.

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

5 Dollar Pizza Tags: Assign multi-location EDIT CONTACT

**Contact Info:**  
 Customer Number: 102  
 Contact name: Diana Bloomer  
 Phone: (218) 327-2223  
 Email: diana@5dollarpizza.com

**Billing Address:**  
 2331 108th Lane, Suite 101  
 Blaine, MN 55449

**Service Location:**  
 Clifford High Way, 188  
 Waldorf, MN 30104

Awaiting Payments \$0.00 Invoice overdue \$0.00 Pending Quotes \$0.00

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Filter: CLEAR FILTER + ADD NEW

Date	Location	Job #	Task Name	Employee Name	File Name	Notes
10/27/2022				elaineg@industrack.com	ElectricalMapofstore.png	Site Map
10/27/2022				elaineg@industrack.com	Gensetforassessment.png	The owner is requesting an assessment of their 10-year-old genset.
10/27/2022				elaineg@industrack.com	Manual.png	Genset's manual

Show 10 entries Previous 1 Next

Use the **Filter Bar** to quickly find an attachment.

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Filter: CLEAR FILTER + ADD NEW

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10/27/2022				elaineg@industrack.com	Gensetforassessment.png	The owner is requesting an assessment of their 10-year-old genset.
10/27/2022				elaineg@industrack.com	Manual.png	Genset's manual

Show 10 entries Previous 1 Next

Use the **Clear Filter** button to remove the filter settings.

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10/27/2022				elaineg@industrack.com	Gensetforassessment.png	The owner is requesting an assessment of their 10-year-old genset.
10/27/2022				elaineg@industrack.com	Manual.png	Genset's manual

Show 10 entries Previous 1 Next

Select the number of attachments to be displayed per page. Options to choose from are 10, 25, 50, and 100. Use the Previous and Next buttons to move from one page to another (if there is more than one page).

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Filter: CLEAR FILTER + ADD NEW

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Show 10 entries Previous 1 Next

Use the **Add New** button to upload an attachment.

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Show 10 entries Previous 1 Next

# Add an Attachment

To attach a file, click the **Add New** button.

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Filter: CLEAR FILTER + ADD NEW

Date	Location	Job #	Task Name	Employee Name	File Name	Notes
No data available in table						

Show 10 entries Previous Next

The **Add New Attachment** window will come up.

**Add New Attachment**

Attachment \*  No file chosen  
Max size 15Mb

Note

☐ Site Map

Fill in the details. Fields with \* are required.

Upload a file/document on the **Attachment\*** field.

To upload the file, use the **Choose File** button. You can attach contracts, instruction manuals, images, site maps, and other files. The maximum allowable size is 15 mb.

**Add New Attachment**

Attachment \*  No file chosen  
Max size 15Mb

Gensetforassessment.png

Note

☐ Site Map

Add notes about the attachment or the associated job or any notes as needed.

**Add New Attachment**

Attachment \*  No file chosen  
Max size 15Mb

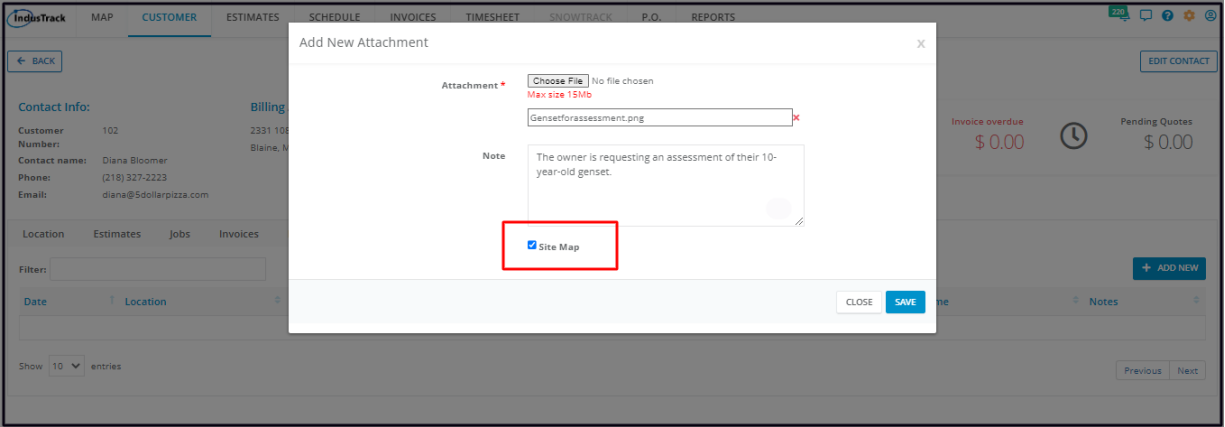
Gensetforassessment.png

Note

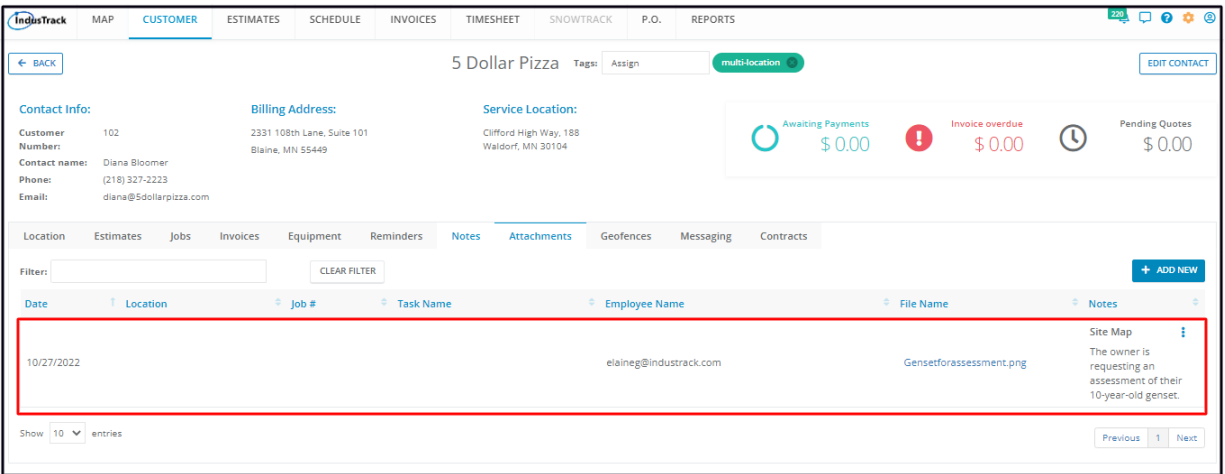
The owner is requesting an assessment of their 10-year-old genset.

☐ Site Map

To make an uploaded sitemap or instruction manual or any uploaded file visible to field employees via the IndusTrack mobile, be sure to tick the **site map** checkbox.



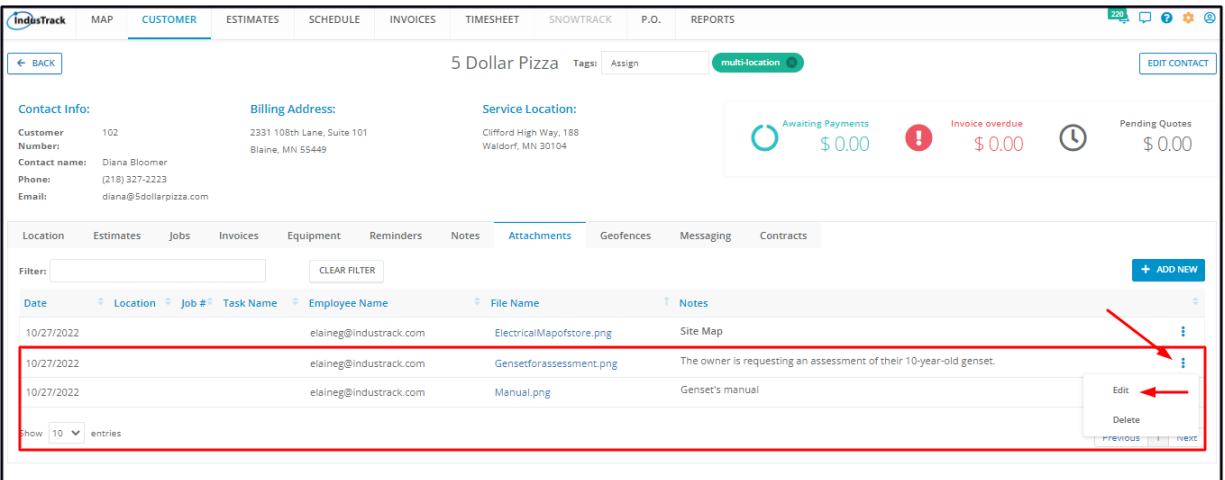
Save the new attachment. The file will be added to the listing.



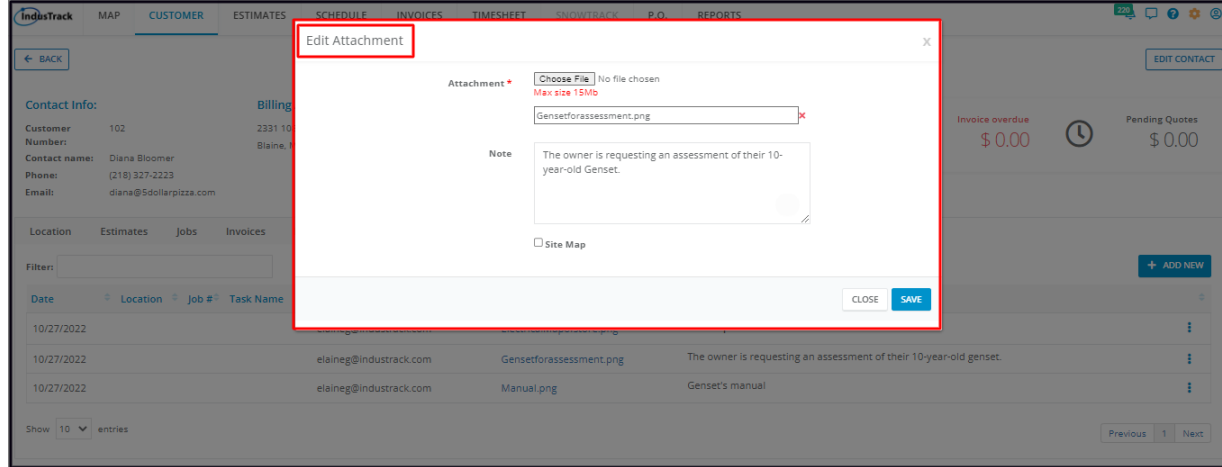
Only one document or file can be uploaded to each attachment record. If you have multiple documents to upload, create separate attachment records for each.

## Edit an Attachment

Find the Attachment Record to be updated from the List. Go to the 3-dot menu to its right and select **Edit**.



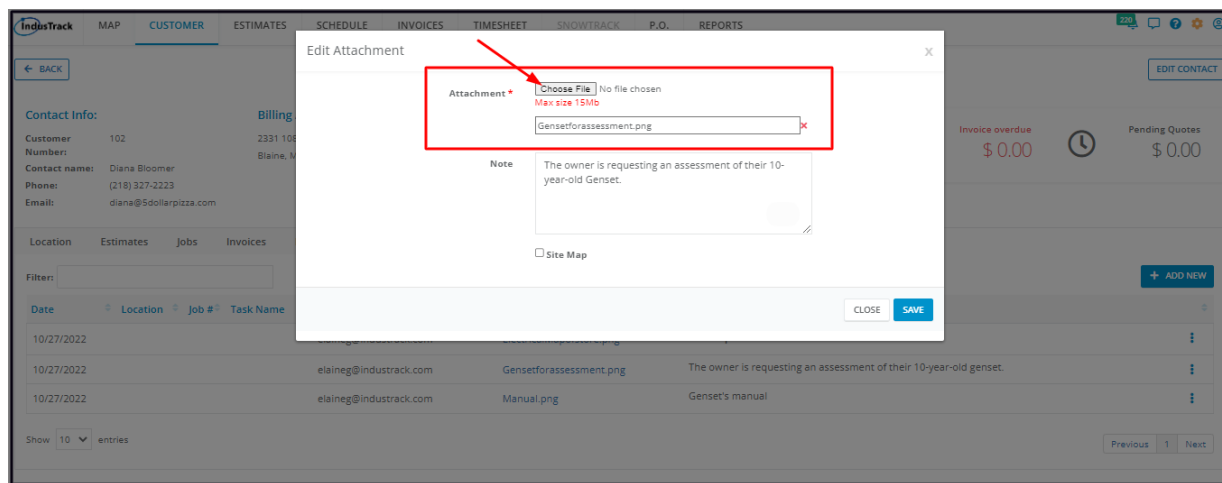
Update the record as needed. **Save** once done.



## Edit an Attachment – Replace an Attached File

Find the Attachment Record to be updated from the List. Open this in edit mode.

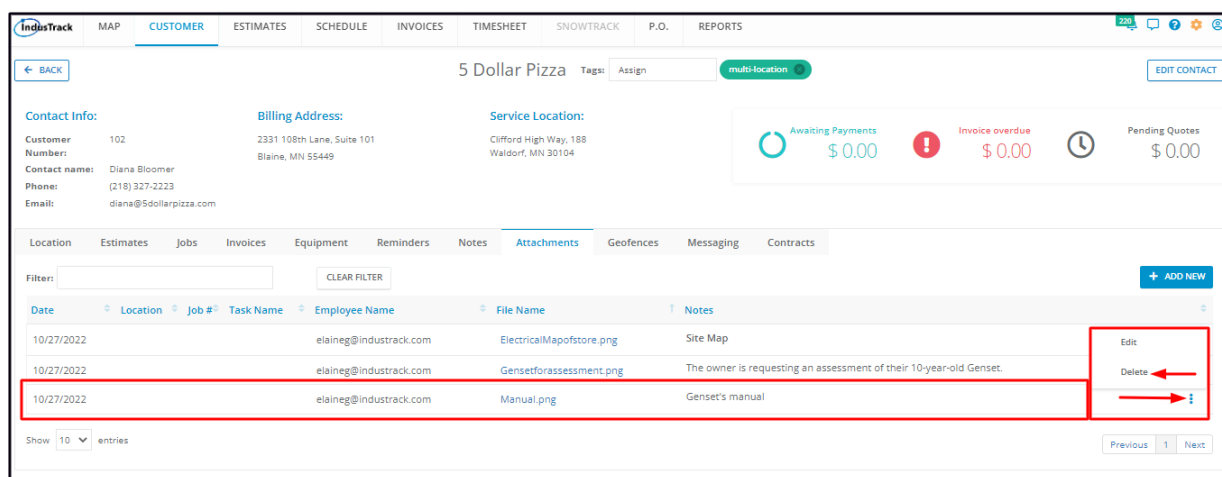
Upload the new document. This will overwrite the existing attached file. Save once done.



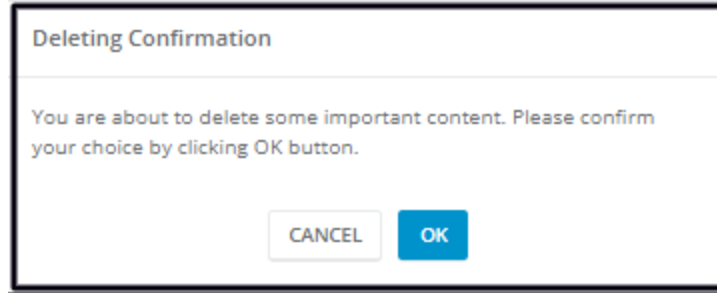
## Delete an Attachment Record

Delete a Customer's Attachment that is no longer being used or was created in error. It is wise to exercise caution when using this function. Deleting a client's record may have an effect on other functions, settings or data. This action can not be undone.

Find the Attachment Record to be deleted from the List. Go to the 3-dot menu to its right and select **Delete**.



From the **Delete Confirmation window** that will come up, select **OK** to continue with the deletion. Select **Cancel** to abandon the action.



The Attachment will be removed from the list.