

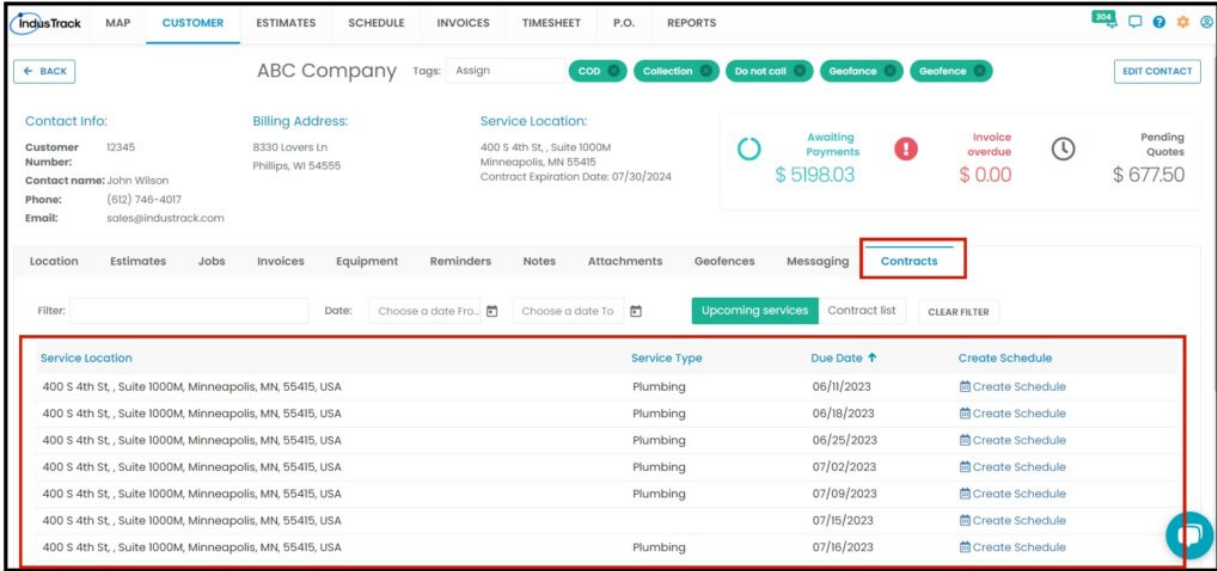
Customer Profile: Manage Contracts

The **Contracts Tab** of the **Customer's Profile** contains a listing of all the **Service Agreements** and **Memberships** that have been created and executed for the client.

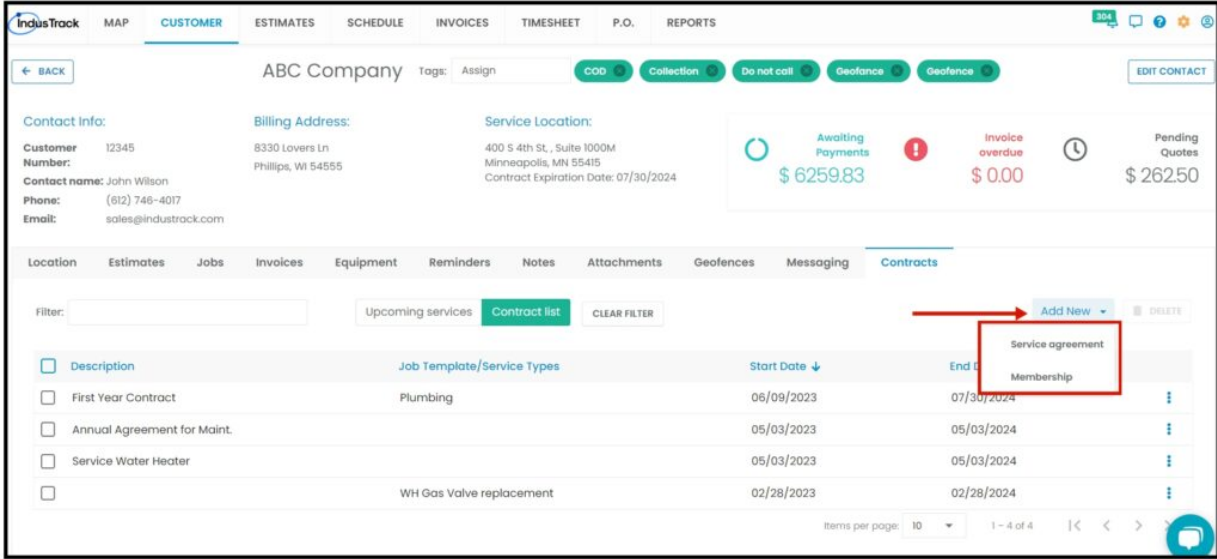
Aside from being a library of agreements and memberships, monitor the status and completion of the contracts and membership via this page.

There are two tabs on the Contracts Page. The Upcoming Services Page, and the Contracts List. By default when clicking on the Contracts Tab, the Upcoming Services tab will pop up.

The Contract Page will have the lists of all the contracts created for the specific customer.



Use the **Add New** button to create Agreements and Memberships.



After you created a new Contract or a Service agreement and saved it, the **Membership and Service Agreement details** will be shown on the listing with their details. The Job Template or Service types included in the agreement/membership, the inclusive start and end dates, and the description of either the contract or program plan.

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

ABC Company Tags: Assign COD Collection Do not call Geofence 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: \$ 6259.83, Invoice overdue: \$ 0.00, Pending Quotes: \$ 262.50

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Filter: Upcoming services **Contract list** CLEAR FILTER Add New DELETE

Description	Job Template/Service Types	Start Date ↓	End Date
<input type="checkbox"/> First Year Contract	Plumbing	06/09/2023	07/30/2024
<input type="checkbox"/> Annual Agreement for Maint.		05/03/2023	05/03/2024
<input type="checkbox"/> Service Water Heater		05/03/2023	05/03/2024
<input type="checkbox"/>	WH Gas Valve replacement	02/28/2023	02/28/2024

Items per page: 10 1 - 4 of 4

The 3-dot menu to the right of each contract is used to open it in edit mode, delete it, or view the status report.

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Items per page: 10 1 - 4 of 4

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

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<input type="checkbox"/>	WH Gas Valve replacement	02/28/2023	02/28/2024

Items per page: 10 1 - 4 of 4

Use the **Filter Bar** to quickly find an agreement or membership.

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 Contact name: John Wilson
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 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: \$ 6259.83
 Invoice overdue: \$ 0.00
 Pending Quotes: \$ 262.50

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging **Contracts**

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Items per page: 10 1 - 4 of 4

Once the Service agreement has been made **Jobs** and **Tasks** – with specific recurring schedules – included in the availed Membership are automatically added to the **Upcoming Services** list. From here once the due date has come, you schedule a job from here.

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Billing Address:
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 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: Date: Choose a date From... Choose a date To... Upcoming services Contract list CLEAR FILTER

Service Location	Service Type	Due Date ↑	Create Schedule
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Plumbing	06/11/2023	Create Schedule
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Plumbing	06/18/2023	Create Schedule
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Plumbing	06/25/2023	Create Schedule
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Plumbing	07/02/2023	Create Schedule
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Plumbing	07/09/2023	Create Schedule
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Plumbing	07/15/2023	Create Schedule
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Plumbing	07/16/2023	Create Schedule

