

Customer Profile: Manage Geofences

The **Geofences** tab of the Customer's Profile 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.

The screenshot shows the '5 Dollar Pizza' customer profile in the 'IndusTrack' system. The 'CUSTOMER' tab is selected, and the 'Geofences' sub-tab is active. The page displays contact information, billing address, and service location. A summary section shows 'Awaiting Payments' at \$0.00, 'Invoice overdue' at \$0.00, and 'Pending Quotes' at \$0.00. Below this, a list of geofences is shown, with 'Name' as the header. The list contains two items: 'Clifford Geofence' and 'Crain Geofence'. The 'Geofences' tab is highlighted with a red box.

The **Geofences List** contains a listing of all the different geofences that have been created for the client's account.

This screenshot is similar to the previous one, but the 'Geofences' tab is highlighted with a red box. The list of geofences is visible, with 'Name' as the header. The list contains two items: 'Clifford Geofence' and 'Crain Geofence'. The 'Geofences' tab is highlighted with a red box.

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

This screenshot is similar to the previous ones, but the 'Name' header in the geofences list is highlighted with a red box, and a red arrow points to it. The list of geofences is visible, with 'Name' as the header. The list contains two items: 'Clifford Geofence' and 'Crain Geofence'. The 'Geofences' tab is highlighted with a red box.

Select the number of geofences 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).

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

5 Dollar Pizza Tags: Assign Geofence 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

+ ADD NEW DELETE

☐ Name ↓

☐ Crain Geofence

☐ Clifford Geofence

Items per page: 10 1 - 2 of 2 |< < > >|

Use the **Add New** and **Delete** buttons to create or remove a Geofence.

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+ ADD NEW DELETE

☒ Name ↓

☒ Crain Geofence

☐ Clifford Geofence

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Create a Geofence

To create a geofence, click the **Add New** button.

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

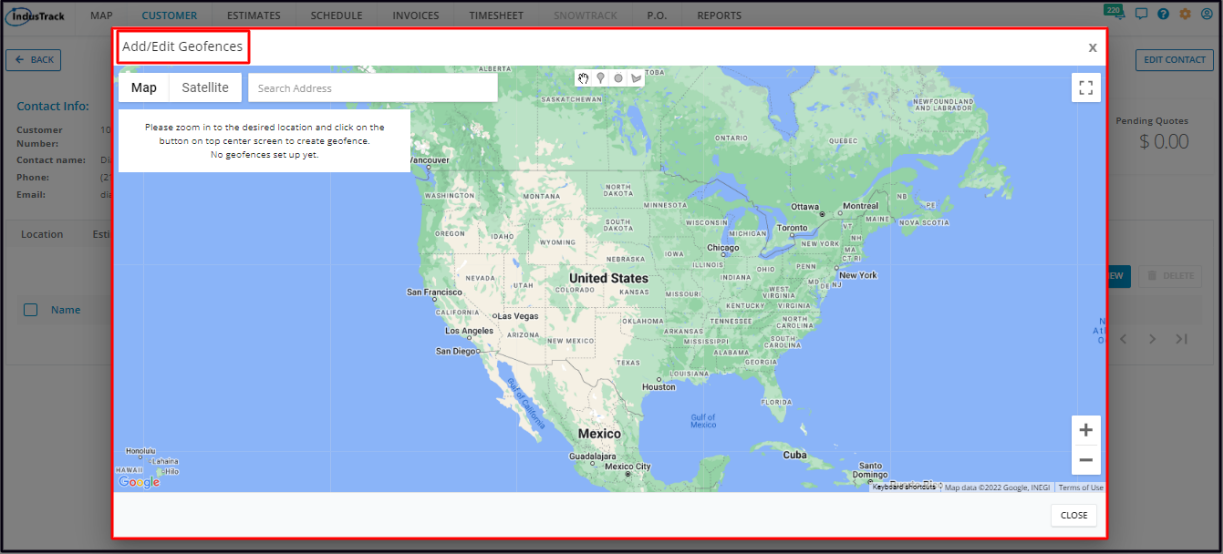
Location Estimates Jobs Invoices Equipment Reminders Notes Attachments **Geofences** Messaging Contracts

+ ADD NEW DELETE

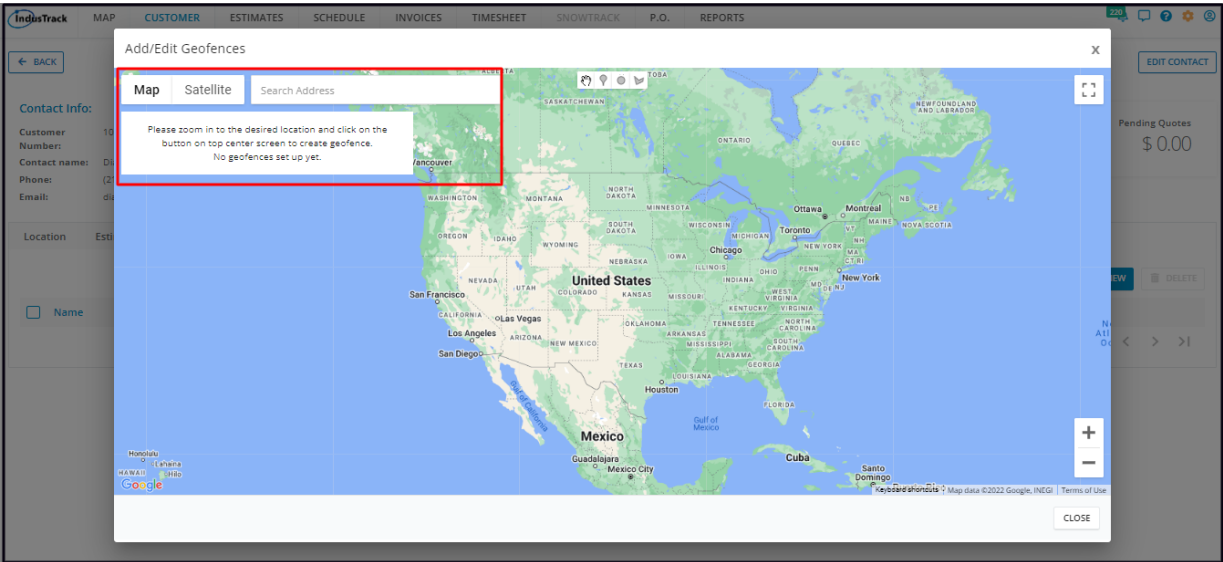
☐ Name

Items per page: 10 0 of 0 |< < > >|

The **Add/Edit Geofences** window will come up.

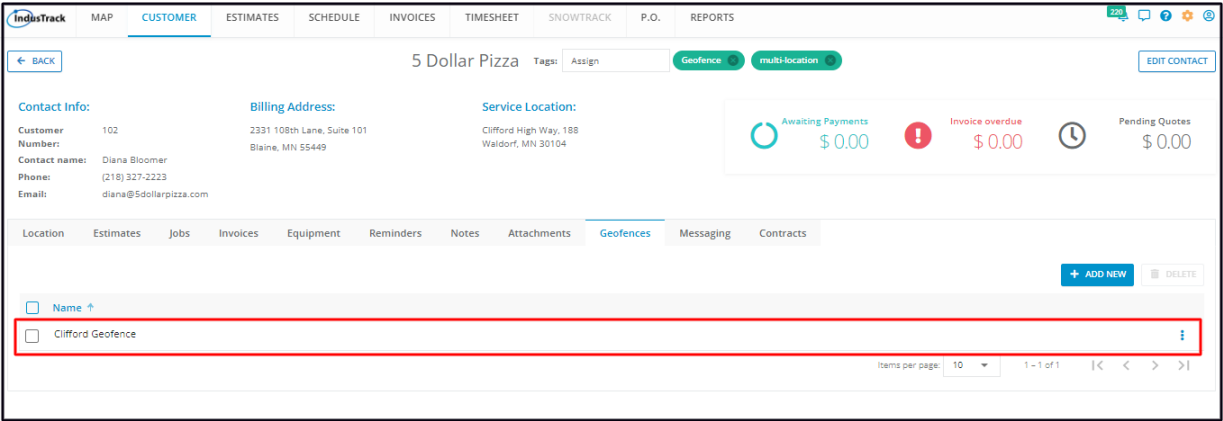


Search for the address using the search bar. To create the geofence, follow the instructions on the **Geofence window**.

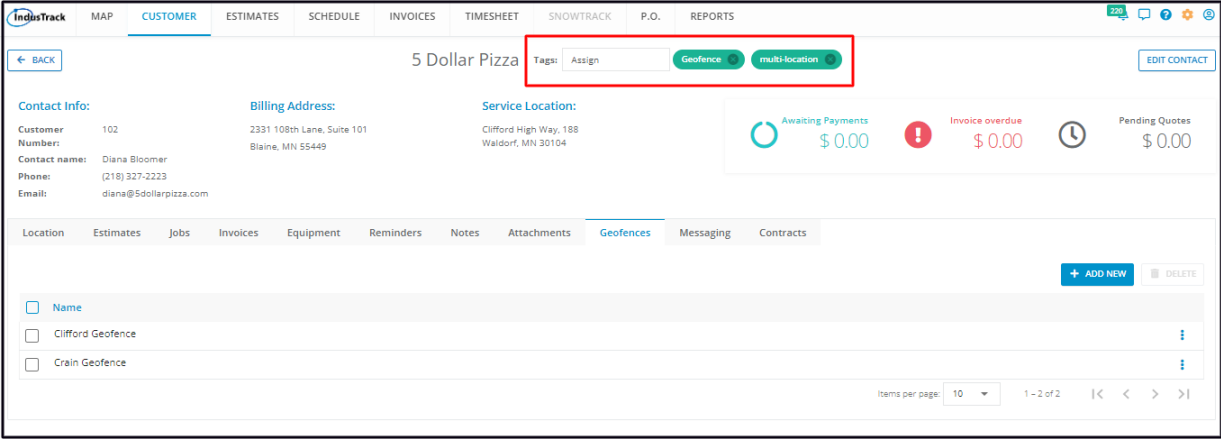


Name the Geofence and Save.

The new geofence will be added to the listing.

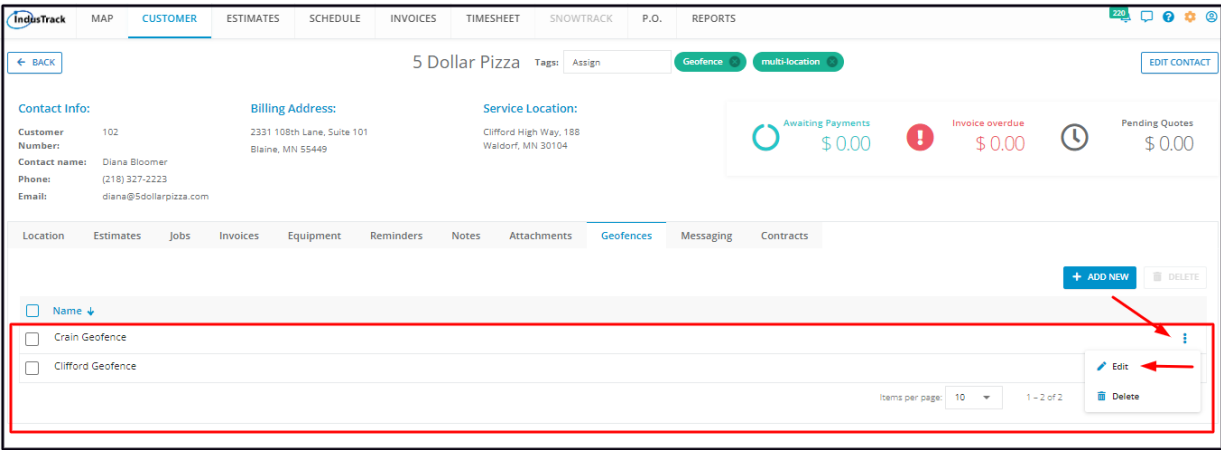


The Geofence Tag will also be added to the client's profile.

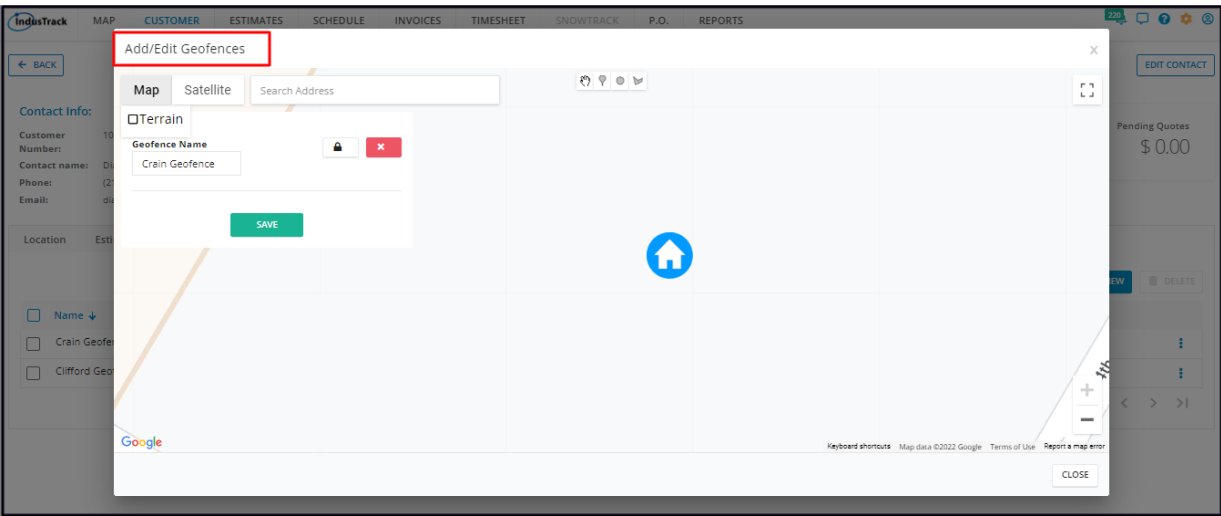


Edit a Geofence

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



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



Delete a Geofence

Delete a Customer's Geofence 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 Geofence to be deleted from the List. Go to the 3-dot menu to its right and select **Delete**.

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5 Dollar Pizza Tags: Assign Geofence 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

+ ADD NEW DELETE

<input type="checkbox"/> Name
<input type="checkbox"/> Crain Geofence
<input type="checkbox"/> Clifford Geofence

Items per page: 10 1 - 2 of 2

Edit Delete

Alternatively, tick the checkbox to the left of the Geofence and go to the **Delete** button.

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+ ADD NEW DELETE

<input type="checkbox"/> Name
<input checked="" type="checkbox"/> Crain Geofence
<input type="checkbox"/> Clifford Geofence

Items per page: 10 1 - 2 of 2

- To delete multiple geofences, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.

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+ ADD NEW DELETE

<input checked="" type="checkbox"/> Name
<input checked="" type="checkbox"/> Crain Geofence
<input checked="" type="checkbox"/> Clifford Geofence

Items per page: 10 1 - 2 of 2

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

Warning!

Do You really want to delete selected item(s)?

CANCEL YES

The Geofence will be removed from the list.