Customer Profile: Messaging

Send an email to your customer via IndusTrack. Any message sent will be added to the Message listing under the **Messaging Tab** of the Customer's Profile. This will help you easily keep track of any messages sent to your client.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS					220, 🖓 🖓	• • 9
← BACK					5 Do	llar Pizza	Tags: Assign		Geofence 🛞	multi-location				EDIT	CONTACT
Contact In Customer Number: Contact nau Phone: Email:	ne: Diana (218) diana	Bloomer 327-2223 @5dollarpizza.com	Billing / 2331 108 Blaine, M	Address: Ith Lane, Suite 101 IN 55449		Service Clifford Hi Waldorf, N	Location: gh Way, 188 IN 30104			O ^{Awaiting Paym} \$ 0.	ients	Invoice overdue \$ 0,00	()	Pending Qu \$ ().	.00
Location	Estima	tes Jobs	Invoices I	Equipment	Reminders	Notes Atta	chments Geof	fences	Messaging	Contracts					
Filter: Fil	er												+ AD	NEW 🗐 🛛	DELETE
	Email Addr	esses				c	reated At			Subject				Status	
	diana@5do	llarpizza.com				c	ct 27, 2022, 8:10:18	PM		Congratulations o	on your Aniversary!			Sent	
	diana@5do	llarpizza.com,carl	@5dollarpizza.cor	m		c	ct 27, 2022, 6:41:49	AM		Expired payment	method			Sent	
											ltems per page	e 15 👻	1-2 of 2	$\langle \rangle$	>

The Messages List contains a listing of all the different messages that have been created and sent to the client.

The details that are shown on the listing are:

- The email addresses of the recipients
- The message/email send date and time
- The subject of the email
- The message status

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS						220	8 🌣 🕲
← ВАСК					5 Do	llar Pizza	Tags: Assign		Geofence 🛞	multi-loca	ition 🛞				E	DIT CONTACT
Contact In	ifo:		Billing A	ddress:		Service	Location:									
Customer Number:	102		2331 108 Blaine, MI	h Lane, Suite 101 N 55449		Clifford Hi Waldorf, N	gh Way, 188 IN 30104			O	iting Payments \$ 0.00	•	Invoice overdue \$ 0.00	J	Pending \$	Quotes 0.00
Contact nan Phone:	ne: Dia (21)	na Bloomer 31 327-2223														
Email:	diar	na@5dollarpizza.com														
Location	Estim	ates Jobs	Invoices E	quipment F	leminders	Notes Atta	chments Geof	ences	Messaging	Contract	s					
Filter: Filt	er													+ 44	D NEW	j delete
	Email Ado	Iresses				c	reated At			Subject					Status	
	diana@5c	lollarpizza.com				c	oct 27, 2022, 8:10:18	PM		Congrat	tulations on your	r Aniversary!			Sent	
	diana@5o	lollarpizza.com,carl	⊚5dollarpizza.con	ı		c	oct 27, 2022, 6:41:49	A.M		Expired	payment metho	d			Sent	
												items per page	15 👻	1 - 2 of 2	< < >	

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

IndusTrack	MAP CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRA	CK P.O.	REPORTS						220	8 🔅 🕲
← BACK				5 Do	llar Pizza	Tags: Assign	1	Geofence	multi-loca	ition 🛞				C	EDIT CONTACT
Contact Inf	io:	Billing A	ddress:		Service	Location:									
Customer Number: Contact name Phone:	102 e: Diana Bloomer (218) 327-2223	2331 108t Blaine, Mř	th Lane, Suite 10 N 55449	1	Clifford H Waldorf, I	igh Way, 188 MN 30104			O www	iting Payments \$ 0.00	0	Invoice over \$ ().(Pendin \$	19 Quotes 5 0.00
Email:	diana@5dollarpizza.com	1													
Location	Estimates Jobs	Invoices E	quipment	Reminders	Notes Att	achments	Geofences	Messaging	Contract	s					
Filter: Filte	r		/										+	ADD NEW	DELETE
Er Er	mail Addresses	-			c	reated At			Subject					Status	
d d	iana@5dollarpizza.com				(Dct 27, 2022, 8:1	0:18 PM		Congrat	ulations on your	Aniversary!			Sent	
d	iana@5dollarpizza.com,carl	@5dollarpizza.com	n		(Dct 27, 2022, 6:4	1:49 AM		Expired	payment metho	d			Sent	
											items per page	: 15 -	1 – 2 of 2	< <	> >

Use the Filter Bar to quickly find a message.

IndusTrack	i M	AP CUSTO	MER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRA	CK P.O.	REPOR	TS					220	- 0
← BACK						5 Do	ollar Pizza	Tags: Assign	1	Geofence	8 multi-lo	cation 🛞					EDIT CONTACT
Contact	Info:			Billing A	Address:		Service	Location:									
Customer Number: Contact n	ame:	102 Diana Bloomer		2331 108 Blaine, MI	th Lane, Suite 101 N 55449		Clifford H Waldorf, I	igh Way, 188 MN 30104			0~	\$ 0.00	•	Invoice ove \$ ()	.00 (D Per	\$ 0.00
Phone: Email:		(218) 327-2223 diana@5dollarpi	zza.com														
Location	E	stimates J	obs	Invoices E	iquipment I	Reminders	Notes Att	achments	Geofences	Messagir	g Contra	cts					
Filter: F	ilter															+ ADD NEW	DELETE
	Email	Addresses					c	Freated At			Subje	ct				Statu	IS
	diana	@5dollarpizza.c	om				(Dct 27, 2022, 8:1	10:18 PM		Congr	atulations on you	ir Aniversary!			Sent	
	diana	@5dollarpizza.c	om,carl@5	5dollarpizza.con	n		(Oct 27, 2022, 6:4	41:49 AM		Expire	ed payment meth	od			Sent	
													ltems per page	: 15 - •	1 – 2 of 2	< <	> >

Select the number of messages to be displayed per page. Options to choose from are 15, 25, and 50. Use the Previous and Next buttons to move from one page to another (if there is more than one page).

IndusTrack	MA	P CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTR	ACK P.O.	REPORTS						220] 😯 🌼 🕲
← ВАСК					5 Do	ollar Pizza	Tags: Assi	ţn	Geofence 🛞	multi-loca	tion 🛞				C	EDIT CONTACT
Contact	Info:		Billing	Address:		Service I	Location:									
Customer Number: Contact na	1 Ime: E	02 Jiana Bloomer	2331 108 Blaine, M	th Lane, Suite 101 IN 55449		Clifford Hij Waldorf, N	gh Way, 188 IN 30104			O	ting Payments \$ 0.00	•	Invoice overdue \$ 0.00	U	Pendir (ng Quotes \$ 0.00
Phone: Email:	(c	218) 327-2223 liana@5dollarpizza.co	m													
Location	Est	imates Jobs	Invoices I	Equipment F	Reminders	Notes Atta	chments	Geofences	Messaging	Contract	5					
Filter: Fi	lter													+ A0	DD NEW	DELETE
	Email A	ddresses				C	reated At			Subject					Status	
	diana@	5dollarpizza.com				c	ct 27, 2022, 8	:10:18 PM		Congrat	ulations on your	r Aniversary!			Sent	
	diana@	5dollarpizza.com,ca	rl@5dollarpizza.cor	n		C	ct 27, 2022, 6	:41:49 AM		Expired	payment metho	d			Sent	
												items per page	: 15 👻	- 2 of 2	< <	$\rightarrow \rightarrow$

Use the Add New and Delete buttons to create or remove a Message(s).

IndusTrack	М	AP CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS						220	0 0
← ВАСК					5 Do	llar Pizza	Tags: Assign		Geofence 🛞	multi-locati	ion 🛞					EDIT CONTACT
Contact	Info:		Billing A	ddress:		Service I	Location:									
Customer Number:	me:	102 Diana Bloomer	2331 108t Blaine, Mř	h Lane, Suite 101 N 55449		Clifford Hig Waldorf, N	gh Way, 188 IN 30104			O	sing Payments \$ 0.00	0	Invoice over \$ 0.	00 C	Per	ding Quotes \$ 0.00
Phone:		(218) 327-2223														
Email:		diana@5dollarpizza.com														
Location	E	stimates Jobs	Invoices E	quipment F	Reminders	Notes Atta	chments Geo	fences	Messaging	Contracts				_		
Filter: F	lter														ADD NEW	DELETE
	Email	Addresses				C	reated At			Subject					Statu	5
Image: A start and a start	diana	@5dollarpizza.com				o	oct 27, 2022, 8:10:18	8 PM		Congratu	lations on your	Aniversary!			Sent	
	diana	@5dollarpizza.com,carl@	95dollarpizza.com	1		o	oct 27, 2022, 6:41:49	AM		Expired p	payment metho	d			Sent	
												tems per page:	15 👻	1 - 2 of 2	< <	> >

Create and Send a Message

To create and send a message to the customer, click Add New.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRAC	.K P.O.	REPORTS					220	0 🔅 🕲
← BACK					5 Do	ollar Pizza	Tags: Assign		Geofence (8	multi-location 🛞				E	EDIT CONTACT
Contact Info Customer Number: Contact name Phone: Email:	0: 102 e: Diana (218) : diana(Bloomer 127-2223 ⊉5dollarpizza.com	Billing , 2331 108 Blaine, M	Address: 8th Lane, Suite 10 IN 55449	1	Service Clifford Hi Waldorf, N	Location: igh Way, 188 AN 30104			Awaiting Payments \$ 0.00		oice overdue \$ 0.00	U	Pendin ⊈	g Quotes
Location Filter: Filte	Estimat	es Jobs	Invoices	Equipment	Reminders	Notes Atta	achments G	Geofences	Messaging	Contracts		[+ ADD I	NEW	DELETE
	Em	ail Addresses				Crea	ted At			Subject	Items per page:	Status 15 ▼ 0 of 0	<	<	> >1

The Add New Message window will come up. Prepare your new message. All fields are required.

IndusTrack M	MAP CUSTOMER	ESTIMATES SCHEDULE	INVOICES TIMES	HEET SNOWTRACK	P.O. REPORTS					🕰 🗘 🛛 🔹 🕲
← BACK			5 Dollar Piz	ZA Tags: Assign	Geofence	multi-location				EDIT CONTACT
Contact Info:		Billing Address:	Ser	vice Location:						
Customer Number: Contact name: Phone:	102 Diana Bloomer (218) 327-2223	2331 108th Lane, Suite 101 Blaine, MN 55449 Add N	ciiff Wale lew Message	ord High Way, 188 dorf, MN 30104	(Awaiting Payments \$ 0.00 X	Ð	Invoice overdue \$ 0.00	(L)	Pending Quotes \$ 0.00
Email:	diana@5dollarpizza.com	Invoices Fauinmer	To* diana@So	dollarpizza.com		Ŧ				
			Subject *							
Filter: Filter			lessare *						+ ADD	NEW T DELETE
	Email Addresses		-					Status		
						1	ltems per pag	ge: 15 🕶 0		$\langle \rangle \rangle$
					CANCEL	SEND MESSAGE				

The default email address is the contact email address indicated on the customer profile. If the client has more than one location, with different email addresses, select the correct one to be used or select both.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS					200 C C C C C C C C C C C C C C C C C C
← BACK					5 Dol	lar Pizza	Tags: Assign		Geofence 🛞	multi-location				EDIT CONTACT
Contact In Customer Number: Contact nam Phone:	fo: 102 ne: Diar (218	a Bloomer) 327-2223	Billing A 2331 108t Blaine, M?	Address: th Lane, Suite 101 N 55449 Add	New Messag	Service Lo Clifford High Waldorf, MN	ocation: h Way, 188 N 30104			Awaiting Payments \$ 0.00 X	0	Invoice overdue \$ 0.00	()	Pending Quotes \$ 0.00
Email: Location Filter: Filte	dian Estim er	a@5dollarpizza.com ates Jobs	Invoices 8	Equipmer	To * 🗹 o Subject *	liana@5dollarpizza.co	.com om						+ AD	D NEW
	E	mail Addresses								1	Items ner n	Status		
				Ŀ			-		CAN	CEL SEND MESSAGE		•		

Key in the **Subject*** of the email.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET		P.O.	REPORTS						220 <u>.</u> 🖵 🕜 🍀 🙁
← BACK					5 Dol	lar Pizza	Tags: Assign		Geofence 🛞	multi-location	0				EDIT CONTACT
Contact Inf	o:		Billing A	ddress:		Service L	ocation:								
Customer Number:	102		2331 108t Blaine, MN	h Lane, Suite 101 I 55449		Clifford Hig Waldorf, MI	h Way, 188 N 30104			OAwaiting	Payments \$ 0.00	0	Invoice overdue \$ 0.00	U	Pending Quotes \$ 0.00
Contact name Phone:	e: Diar (218	a Bloomer) 327-2223		Add	New Messag	e					×				
Email:	dian	a@5dollarpizza.com			то *	diana@5dollarpi	zza.com, carl@5dollar	pizza.com		*					
Location	Estim	ates Jobs	Invoices E	quipmer							ר ו				
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					Message *										
	E	mail Addresses											Sta	tus	
										li		ltems per pag	e: 15 🔻		
									CAN	ICEL	MESSAGE				

Prepare your **Message***. Send the email once done.

IndusTrack	MAF	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET		P.O.	REPORTS						5 C C C C C C C C C C C C C C C C C C C
← ВАСК					5 Dol	lar Pizza	Tags: Assign		Geofence 🛞	multi-location	0				EDIT CONTACT
Contact Inf	fo:		Billing A	ddress:		Service L	ocation:								
Customer Number: Contact nam	10 e: Di	2 ana Bloomer	2331 108th Blaine, MN	h Lane, Suite 101 I 55449 Add	New Messag	Clifford Hig Waldorf, Mi	n Way. 188 ≬30104				Payments 5 0.00 X	0	Invoice overdue \$ 0.00	J	Pending Quotes \$ 0.00
Email:	(2 di	na@5dollarpizza.com			To *	diana@5dollarpi	zza.com, carl@5dollarj	pizza.com		•					
Location	Esti	mates Jobs	Invoices E	quipmer											
					Subject *	Expired paymer	nt method				_				
Filter: Filte					Message *	Hi there!				*				+ ADI	D NEW
		Email Addresses				Our records sho the next 45 day	w that your paymer s.	nt method (on file will expir	e within 👻		ltems per pa	Statu ge: 15 💌	s 0 of 0 4	$\langle \rangle \rangle$
									CANO	EL SEND N	IESSAGE				

The message will be added to the listing.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS						🕰 🖵 ? 🌼 🛛
← BACK					5 Do	ollar Pizza	Tags: Assign		Geofence 🛞	multi-locatio	an 🙁				EDIT CONTACT
Contact Inf Customer Number: Contact nam Phone:	0: 102 e: Diana (218)	a Bloomer 327-2223	Billing A 2331 108 Blaine, M	Address: th Lane, Suite 101 N 55449		Service Clifford Hi Waldorf, N	Location: gh Way, 188 IN 30104			O	ng Payments \$ 0.00	0	Invoice overdue \$ 0.00	()	Pending Quotes \$ 0.00
Email: Location	diana Estima	@5dollarpizza.com ites Jobs	Invoices E	quipment I	Reminders	Notes Atta	ichments Geof	ences	Messaging	Contracts					
Filter: Filte	r													+ ADD	NEW DELETE
	mail Add	resses					Created At				Subject			s	tatus
	diana@5d	ollarpizza.com,car	rl@5dollarpizza.co	m			Oct 27, 2022	, 6:41:49 A	M		Expired pay	ment metho	d	2	ient
											H	ems per page:	15 💌 1 -	1 of 1 🛛	< > >

Delete a Message Record

Delete a message record from the client's address book that is no longer being used/referred to 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.

To remove a message record from the list tick the checkbox to its left and click **Delete**.

← BACK 5 Dollar Pizza Tags: Assign Geofence D (multi-location D	EDIT CONTACT
Contact Info: Billing Address: Service Location:	
Customer 102 2331 108th Lane, Suite 101 Clifford High Way, 188 Number: Blaine, MN 55449 Waldorf, MN 30104 Contact name: Diana Bloomer) Pending Quotes \$ 0.00
Phone: (218) 327-2223 Email: diana@Sdollarpizza.com	
Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts	ADD NEW
Email Addresses Created At Subject	Status
diana@5dollarpitza.com Oct 27, 2022, 8:10:18 PM Congratulations on your Aniversary!	Sent
v diana@5doilsrpizza.com,carl@5doilsrpizza.com Oct 27, 2022, 6:41:49 AM Expired payment method	Sent
ltems per page: 15 ▼ 1-2 of 2	$ \langle \langle \rangle \rangle \rangle > $

• To delete multiple message records, tick the checkboxes to the left of all. If all items on the list will be deleted, just tick the checkbox of the Name header.

IndusTrack	M	AP CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS						220] 🖓 🖓 🌣	9
← BACK					5 Do	llar Pizza	Tags: Assign		Geofence 🛞	multi-locati	ion 🕲				EDIT CONTA	ст
Contact I	nfo:		Billing A	Address:		Service	Location:									
Customer Number: Contact na	me:	102 Diana Bloomer	2331 108t Blaine, Mř	th Lane, Suite 101 N 55449		Clifford H Waldorf, 1	gh Way, 188 /IN 30104			O	ing Payments \$ 0.00	•	Invoice overdue \$ 0.00	J	Pending Quotes \$ 0.00	
Phone: Email:		(218) 327-2223 diana@5dollarpizza.com														
Location	E	stimates Jobs	Invoices E	iquipment F	Reminders	Notes Atta	achments Geol	fences	Messaging	Contracts				+ ADD	NEW 💼 DELETE	
	Email	Addresses				c	reated At			Subject					Status	٢
✓	diana@5dollarpizza.com				c	Oct 27, 2022, 8:10:18 PM				Congratulations on your Aniversary!						
✓	diana@5dollarpizza.com,carl@5dollarpizza.com				Oct 27, 2022, 6:41:49 AM				Expired payment method				Sent			
												tems per page	15 💌 1	- 2 of 2 <	$\langle \rangle \rangle$	

The Delete Confirmation window will come up. Click Yes to continue with the delete action. Click No to cancel the action.



The message record will be removed from the list.