

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

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

Filters: Filter + ADD NEW DELETE

Email Addresses	Created At	Subject	Status
<input type="checkbox"/> diana@5dollarpizza.com	Oct 27, 2022, 8:10:18 PM	Congratulations on your Anniversary!	Sent
<input type="checkbox"/> diana@5dollarpizza.com, carl@5dollarpizza.com	Oct 27, 2022, 6:41:49 AM	Expired payment method	Sent

Items per page: 15 1 - 2 of 2 < > >>

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

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

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Use the **Filter Bar** to quickly find a message.

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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).

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

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Create and Send a Message

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

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Email Addresses	Created At	Subject	Status
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Items per page: 15 0 of 0 |< < > >|

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

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Location Estimates Jobs Invoices Equipments

Filter: Filter

Email Addresses

Items per page: 15 0 of 0 |< < > >|

ADD NEW DELETE

Status

Items per page: 15 0 of 0 |< < > >|

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.

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Filter: Filter

Email Addresses

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ADD NEW DELETE

Status

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

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Filter: Filter

Email Addresses

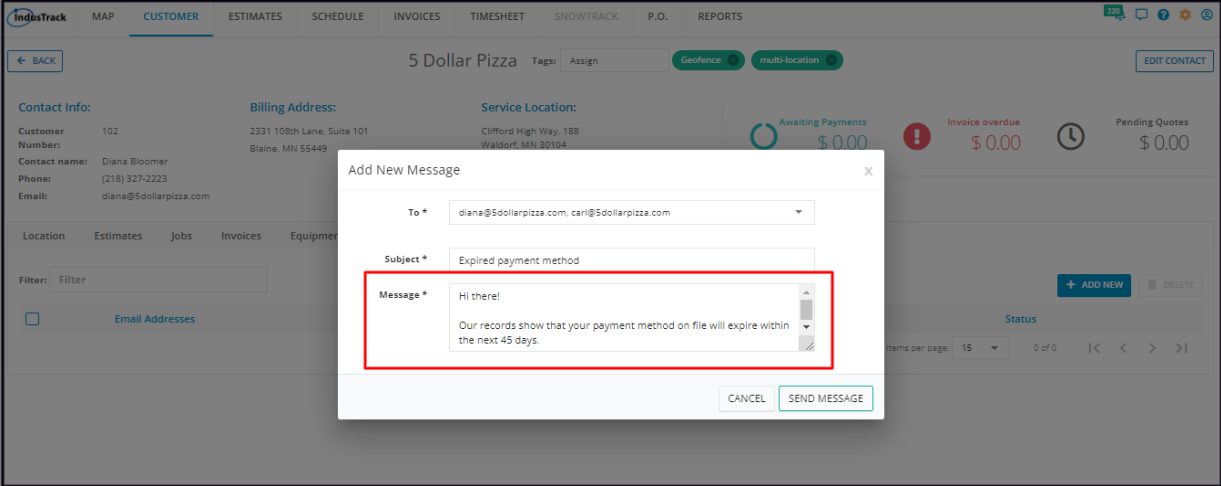
Items per page: 15 0 of 0 |< < > >|

ADD NEW DELETE

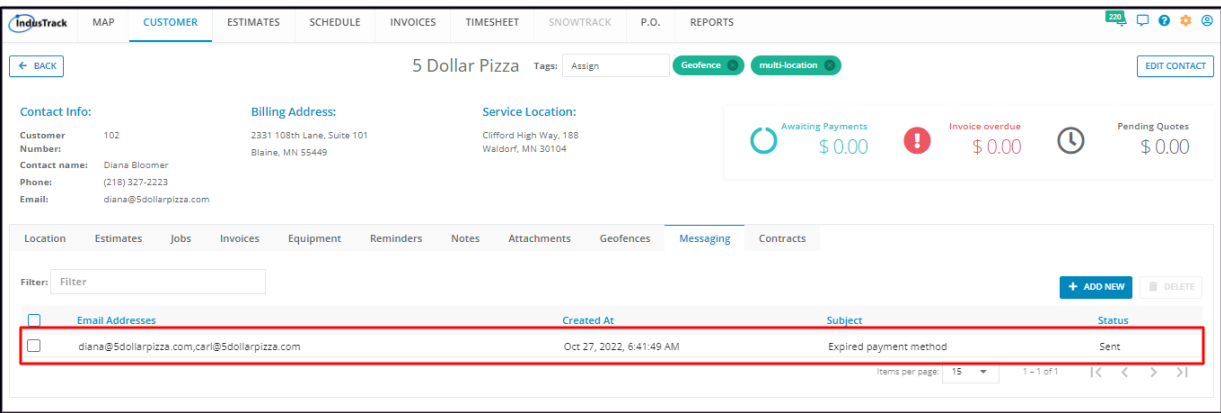
Status

Items per page: 15 0 of 0 |< < > >|

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



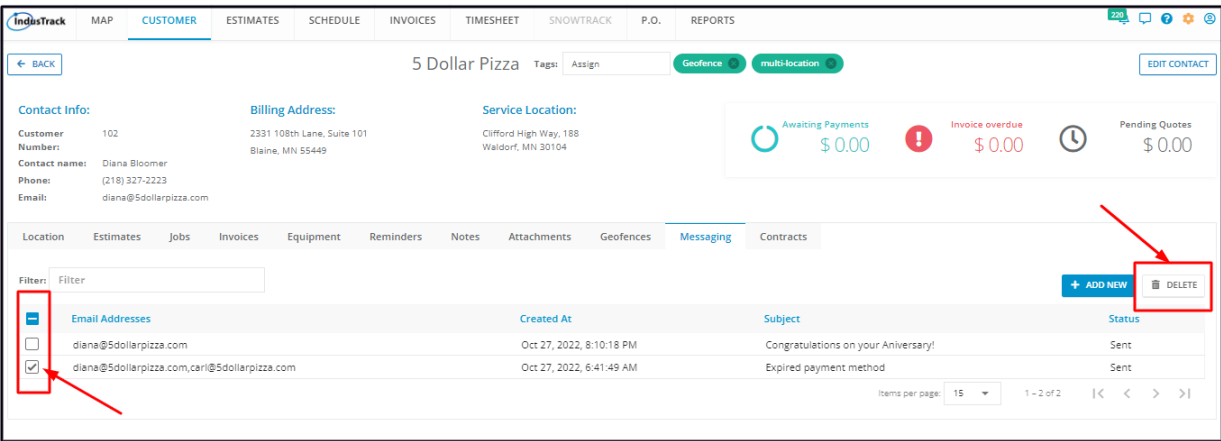
The message will be added to the listing.



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**.



- 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.

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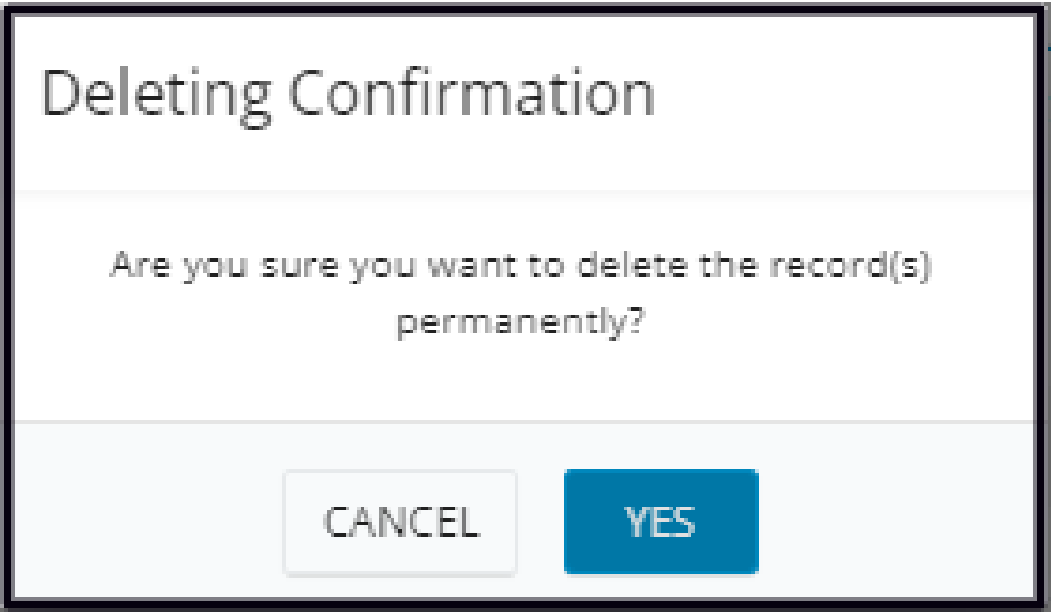
Filters: Enter

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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.

