

Triggers

Add **Triggers** to forms to automatically prompt the completion of these when certain triggers associated with tasks or jobs are activated/completed.

To access the Triggers page, go to **Settings > Form Settings > Triggers**.

The Triggers page contains all of the form triggers that have been created and will be created in IndusTrack.

From this page, you will be able to view, create, edit, and delete triggers.

Triggers List/Table

The Triggers table has 4 columns:

- Created At – This refers to the date and time when the trigger was created.
- Type – This refers to the condition/action/status that will prompt the execution of the form.
- Form – This refers to the form that will be triggered.
- Description – This is a brief about the trigger. It is optional information about the trigger.

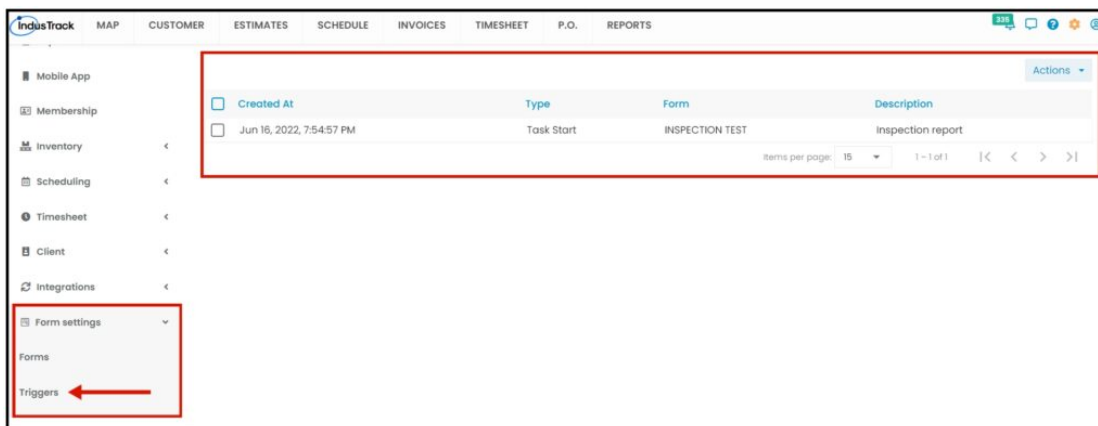
Sort the Triggers List

Click on a column header to sort the list according to the selected header.

Items Per Page

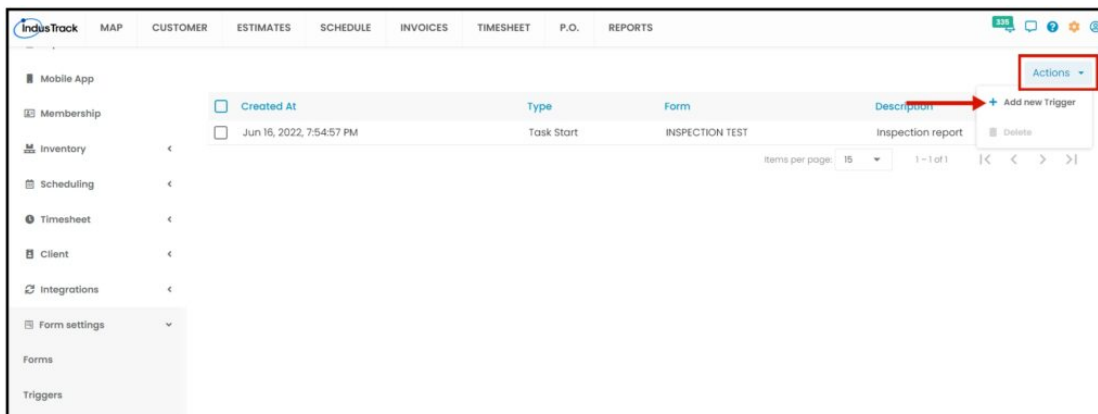
Select the number of triggers to be displayed per page. Options to choose from are 15, 25, and 50.

Use the side arrows to move from one page to another (if there is more than one page). If there is only 1 page, this feature is disabled.



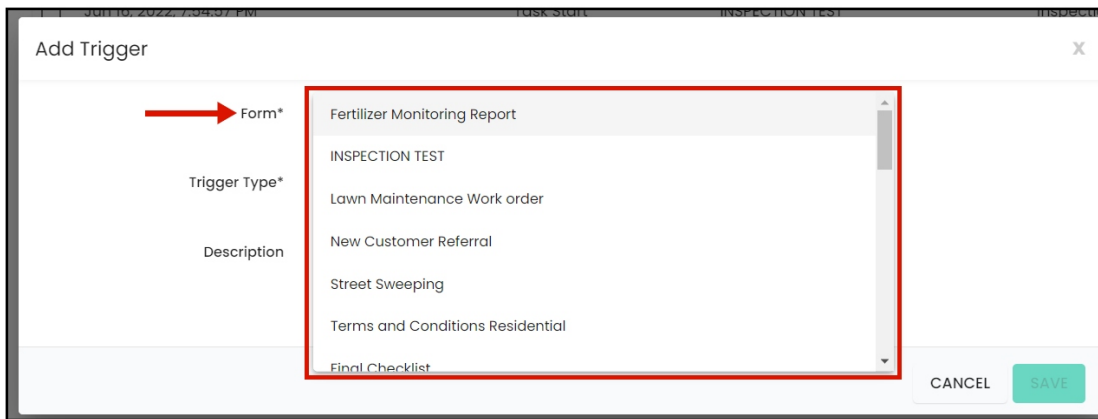
Create a Trigger

To create a new trigger, click the **ACTIONS** button and select **+AddNewTrigger**.



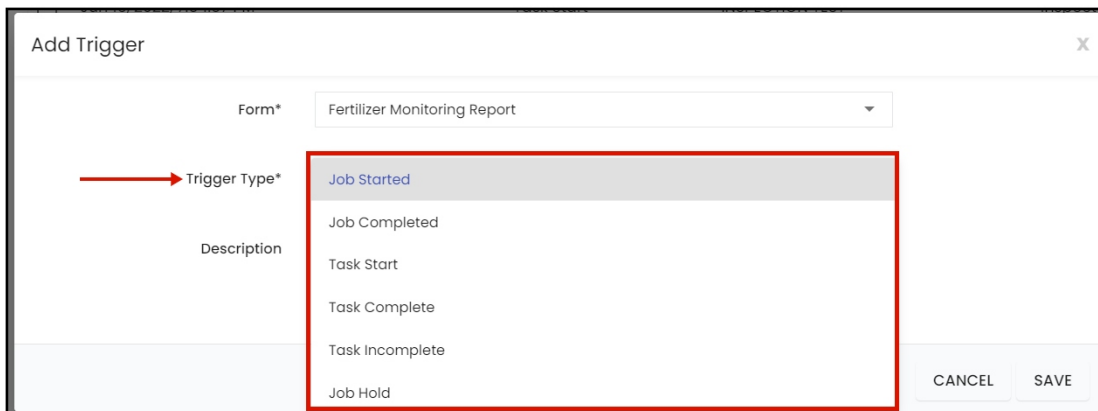
From the Add Trigger window, fill out the details. fields with * are required ones.

- **Form*** – Select from the drop-down list of forms.



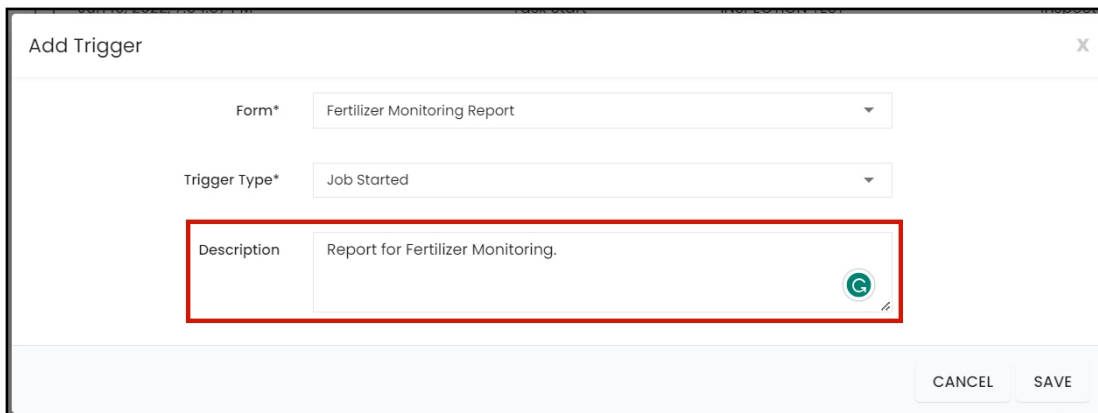
The screenshot shows the 'Add Trigger' dialog box. The 'Form*' dropdown menu is open, displaying a list of forms: Fertilizer Monitoring Report, INSPECTION TEST, Lawn Maintenance Work order, New Customer Referral, Street Sweeping, Terms and Conditions Residential, and Final Checklist. A red arrow points to the 'Form*' label. The 'Trigger Type*' and 'Description' fields are empty. The 'CANCEL' and 'SAVE' buttons are at the bottom right.

- **Trigger Type*** – Select the condition/action/status that will prompt or “trigger” the execution of the form.



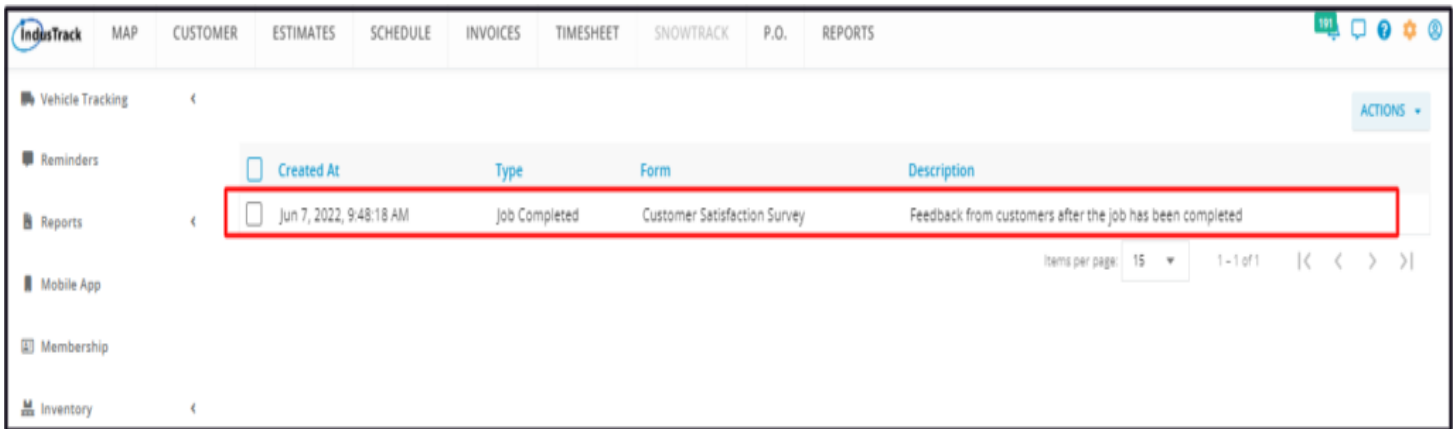
The screenshot shows the 'Add Trigger' dialog box. The 'Form*' dropdown menu is set to 'Fertilizer Monitoring Report'. The 'Trigger Type*' dropdown menu is open, displaying a list of trigger types: Job Started, Job Completed, Task Start, Task Complete, Task Incomplete, and Job Hold. A red arrow points to the 'Trigger Type*' label. The 'Description' field is empty. The 'CANCEL' and 'SAVE' buttons are at the bottom right.

- **Description** – Add a short brief about the trigger. This will help the user/reader easily identify what the form is about.



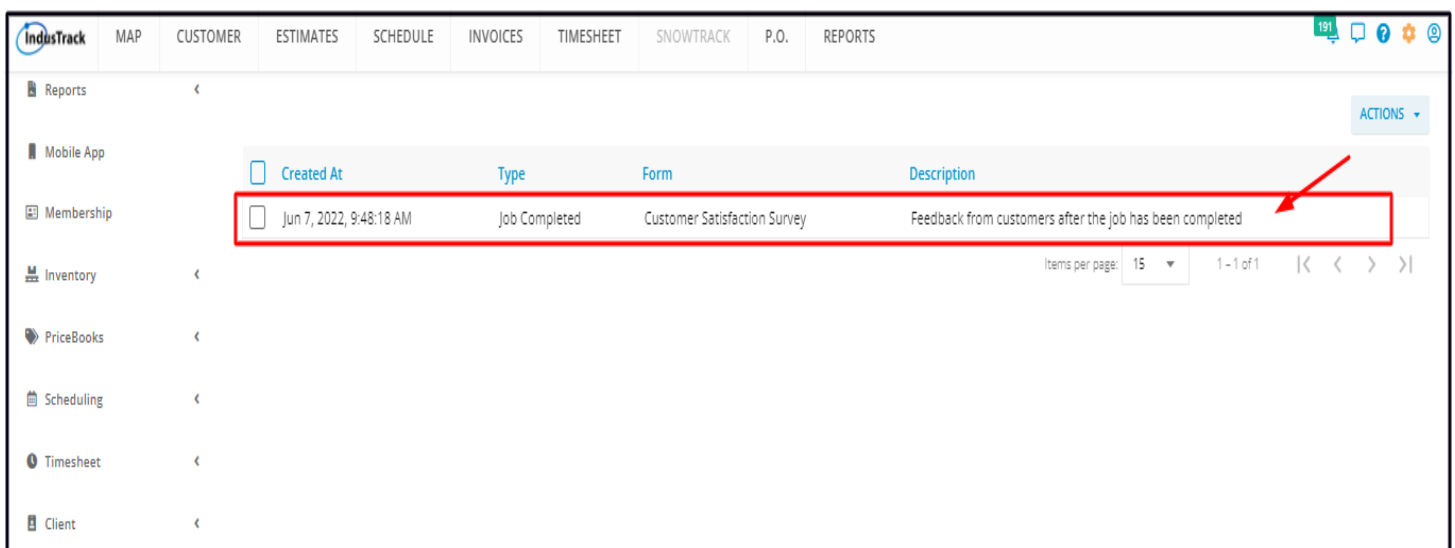
The screenshot shows the 'Add Trigger' dialog box. The 'Form*' dropdown menu is set to 'Fertilizer Monitoring Report'. The 'Trigger Type*' dropdown menu is set to 'Job Started'. The 'Description' field is filled with the text 'Report for Fertilizer Monitoring.' and has a green circular icon with a 'G' next to it. The 'CANCEL' and 'SAVE' buttons are at the bottom right.

Save the new Trigger. This will be added to the Trigger List.

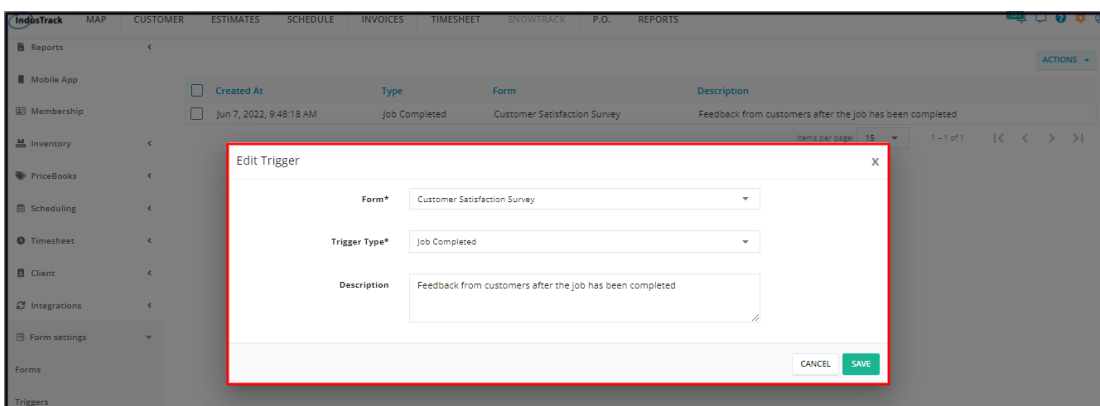


VIEW AND EDIT A TRIGGER

Click anywhere on the row of the trigger to be edited. This will open the trigger in edit mode.



Edit the trigger as may be needed. Save once done.



DELETE A TRIGGER

Click on the **Actions** button.

By default, the **Delete** option is disabled. Select the trigger to be deleted and tick the checkbox to its left. Select the Delete option which will now be enabled.

To delete multiple forms, tick the checkboxes of these forms and hit delete.

To delete all forms, tick the checkbox to the left of the Name header.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

19%

Reports

Mobile App

Membership

Inventory

PriceBooks

Scheduling

Created At	Type	Form	Description
<input checked="" type="checkbox"/>	Jun 7, 2022, 9:48:18 AM	Job Completed	Customer Satisfaction Survey
<input checked="" type="checkbox"/>			Feedback from customers after the job has been completed

Items per page: 15 1 - 1 of 1

ACTIONS

+ Add new Trigger

Delete