

General Company Settings

Brand your business in **IndusTrack!**

To access your company profile, go to **Settings > Company Settings > General**.

Information about your company is not just there for records purposes. Upload your company logo and we'll add these to your estimates and invoices. Your website URL and contact details will always be on those documents too.

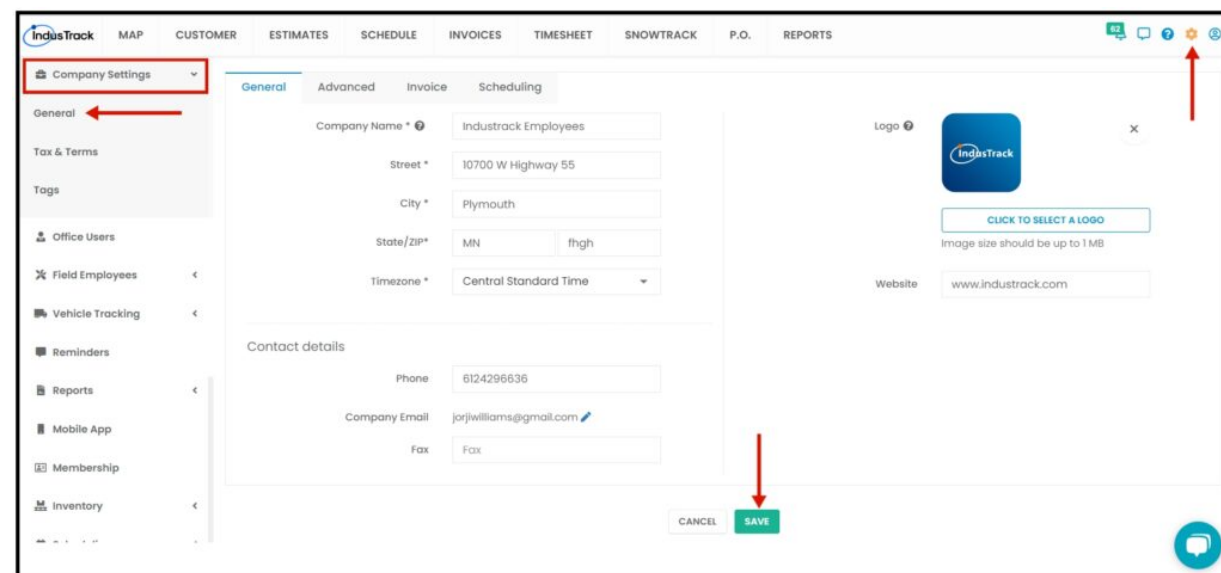
Some information about your company will already be in the fields. Go over them and update where necessary and fill in any missing items. Fields with (*) are required. As much as possible, provide complete details.

Company Name – This is your company's registered name. Make sure that this is correct (double-check the spelling!). This will appear on many of your forms including estimates and invoices for your customers.

Address* – Similarly, check that everything is correct. Select your **Timezone from the dropdown**. By default, device timestamps are converted into your local timezone, but if you would rather see the timestamp local to the device in reports, tick the checkbox **Use Device Timezone**.

Contact Details – Provide the company contact details (Phone, Email, and Fax) and not the CEO's or contact person's information.

Always **SAVE** any changes you make! The Save button is at the bottom of the General tab.

A screenshot of the IndusTrack web application showing the 'General' tab of the 'Company Settings' form. The top navigation bar includes 'IndusTrack' and various menu items like 'MAP', 'CUSTOMER', 'ESTIMATES', 'SCHEDULE', 'INVOICES', 'TIMESHEET', 'SNOWTRACK', 'P.O.', and 'REPORTS'. On the left, a sidebar menu lists 'Company Settings' (highlighted with a red box and arrow), 'General' (highlighted with a red arrow), 'Tax & Terms', 'Tags', 'Office Users', 'Field Employees', 'Vehicle Tracking', 'Reminders', 'Reports', 'Mobile App', 'Membership', and 'Inventory'. The main form area has tabs for 'General', 'Advanced', 'Invoice', and 'Scheduling'. The 'General' tab contains fields for 'Company Name *' (Industrack Employees), 'Street *' (10700 W Highway 55), 'City *' (Plymouth), 'State/ZIP*' (MN, fhgh), 'Timezone *' (Central Standard Time), 'Contact details' (Phone: 6124296636, Company Email: jorjwilliams@gmail.com, Fax: Fax), and a 'Logo' section with a 'CLICK TO SELECT A LOGO' button and a note 'Image size should be up to 1 MB'. At the bottom right, there are 'CANCEL' and 'SAVE' buttons, with a red arrow pointing to the 'SAVE' button. A red arrow also points to the top right corner of the application window.

Upload the Company Logo

To upload your company logo, follow the steps below:

1. Under Company Info of the General tab, go to **Click to Select a Logo** button.
2. Select and upload the image from your device.
3. Save the uploaded image by clicking the **Save button** at the bottom of the General tab.

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

Company Settings

General

Tax & Terms

Tags

Office Users

Field Employees

Vehicle Tracking

Reminders

Reports

Mobile App

Membership

Inventory

General

Advanced

Invoice

Scheduling

Company Name * Industack Employees

Street * 10700 W Highway 55

City * Plymouth

State/Zip* MN fhgh

Timezone * Central Standard Time

Contact details

Phone 6124296636

Company Email jorjwilliams@gmail.com

Fax

Logo

CLICK TO SELECT A LOGO

Image size should be up to 1 MB

Website www.industrack.com

CANCEL SAVE

Change the Company Logo

1. Under Company Info of the General tab, go to the **Click to Select a Logo** button.
2. Select and upload the new image from your device. This will automatically replace the current uploaded logo.
3. Save the new logo by clicking the **Save** button at the bottom of the **General** tab.

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Logo

IndusTrack

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CANCEL SAVE

Delete The Company Logo

1. Under Company Info of the General tab, go to the **uploaded Logo**.
2. Click on the **delete icon (X)** to its right. This will remove the image from your profile.

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

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General Advanced Invoice Scheduling

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CANCEL SAVE

Advanced Company Settings

When you create invoices, estimates, purchase orders, jobs, and customer numbers, it is important that these are sequentially numbered. These numbers ensure proper tracking and documentation for tax and accounting purposes.

The number sequences are set up in this section. If you do not set this up, you will have to enter a number manually on each item or they will be unnumbered.

Set Up Auto Incrementing and Starting Numbers

To access the Advanced Settings page, go to **Settings > Company Settings > General > Advanced**.

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

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General Advanced Invoice Inventory Scheduling

Starting Numbers

Document	Autoincrement	Starting Number
Jobs	<input type="checkbox"/>	
Invoices	<input type="checkbox"/>	
Estimates	<input type="checkbox"/>	
Purchase orders	<input type="checkbox"/>	
Customers	<input type="checkbox"/>	

CANCEL SAVE

1. Select the option to be set (Jobs, Invoices, Estimates, Purchase Orders, or Customers).
2. Tick the checkbox for **Autoincrement**. This will enable the **Starting Number** field.
3. Key in the starting number.
 - Ordinarily, the sequence is started at 1. But if you already have existing invoices (for example) and you want to continue the numbering pattern, you can use the next number in the series.
4. Repeat the same process for the other 3 options.
5. **Save** the setup.

General **Advanced** Invoice Inventory Scheduling

Starting Numbers ?

Document	Autoincrement	Starting Number
Jobs	<input checked="" type="checkbox"/>	0
Invoices	<input type="checkbox"/>	
Estimates	<input type="checkbox"/>	
Purchase orders	<input type="checkbox"/>	
Customers	<input type="checkbox"/>	

CANCEL SAVE

General **Advanced** Invoice Inventory Scheduling

Starting Numbers ?

Document	Autoincrement	Starting Number
Jobs	<input checked="" type="checkbox"/>	1
Invoices	<input checked="" type="checkbox"/>	1
Estimates	<input checked="" type="checkbox"/>	1
Purchase orders	<input checked="" type="checkbox"/>	1
Customers	<input type="checkbox"/>	

CANCEL SAVE

Invoice Settings

Set up Invoice Report period by monthly or weekly. Enable Late Fee if applicable. Always click on Save when making changes.

General **Advanced** **Invoice** Scheduling

Report Period

Monthly

Fees

☒ Enable Late Fees

CANCEL SAVE

Scheduling Settings

- **Automatically add job notes to invoice** – When converting a job to an invoice, all notes from the job will automatically carry over to the invoice.
- **Automatically add office user notes to invoice** – When converting a job to an invoice, all office user notes that have been added to the job will automatically carry over to the invoice.
- **Automatically add equipment notes to invoice** – Will automatically add equipment service notes to the invoice once the job is converted.
- **Automatically add estimate notes to the job** – When an estimate is converted into a job, notes from the estimate will automatically carry over to the job.
- **Lock the job from editing once invoiced**
- **Add job/Travel time to Invoice** – When enabled, the field employees' time spent on the job will automatically be added as a line item on the invoice. This will be disabled when Quickbooks integration is set up since we can also sync the timesheet entries to Quickbooks.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

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Invoice

Scheduling

☒ Automatically add job notes to invoice

☒ Automatically add office user notes to invoice

☒ Automatically add equipment notes to invoice

☒ Automatically add estimate notes to the job

☐ Lock the job from editing once invoiced

☐ Add Job/Travel time to invoice

Job/Travel Time

CANCEL

SAVE

