Mobile App Settings

Mobile app access and licenses are provided to field employees.

Their <u>login credentials and permissions</u> are set up for each of them on the add or edit field employee page. The settings for the app, on the other hand, are set up on the **Mobile App settings** page by Office Users who have permission to do so.

To set up Mobile Application settings, go to **Settings > Mobile App.**

IndusTrack MAP	CUSTOM	ER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS	₩ ₽ 0 0
Company Settings	٤	General Snowplow Estimate Invoice Scheduling	
Office Users		General	
🎗 Field Employees	٠	Sync Data with Mobile App every (min) 1	
R Vehicle Tracking	٢	Can Driver Edit Sync Interval 🛛 💈	
Reminders		Download Job Data to Mobile App with Full Sync for (days) 30	
Reports	٠	Download History Data to Mobile App for (months) 6	
📕 Mobile App 🛛 📥		Default Screen	
E Membership		Can Field Employee Edit Default Page 🛛 🖉	
🔛 Inventory	¢	Sync Images only on WiFi 🛛 💈	
PriceBooks	¢	Hide internal notes from field employees	

General Settings

At the General tab, set up the general settings for the Mobile App.

Sync Data with Mobile App every (min)

Set the sync frequency of data into the mobile app, in minutes. The app will update according to the set frequency.

Can Driver Edit Sync Interval

- This setting will allow the driver or mobile app user to make changes to the Sync Data with Mobile App settings.
- Tick the checkbox if the action will be allowed. Uncheck if the action will not be allowed.

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Reports	¢	D	ownload History Data to Mobile Ap	p for (months)			
Mobile App				Default Screen		~	
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Ma Inventory	¢		Sync Imag	es only on WiFi			
PriceBooks	¢		Hide internal notes from f	eld employees			
			Allow	dit customers			
Scheduling	¢		Send estimate\invoice\form from	ompany email			
Timesheet	٠	AI	low supervisors to view other field	employee jobs			

Download Job Data to Mobile App with Full Sync for (days)

- Set how far back job data can still be downloaded into the mobile app.
- This is set in days.

Download History Data to Mobile App for (months)

- Set how far back historical data can still be downloaded into the mobile app.
- This is set in months.

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K Vehicle Tracking	¢		Can Driver Edit Sync Interval	8	
Reminders			Download Job Data to Mobile App with Full Sync for (days)	12	
Reports	¢		Download History Data to Mobile App for (months)	6	
Mobile App			Default Screen	v	
Membership			Can Field Employee Edit Default Page	0	
Linventory	¢		Sync Images only on WiFi	0	
PriceBooks	¢		Hide internal notes from field employees		
			Allow edit customers	0	
🛱 Scheduling	¢		Send estimate\invoice\form from company email	D	
O Timesheet	< _				

Default Screen

• Select which of the options from the drop-down will be the default login page of the mobile units.

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Reports	4	Download History Data to Mobile App for (months)	4	
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Inventory	¢	Sync. In ages only on Wifi	Forms Map	
PriceBooks	٠	Hide internal notes from field employees	Essimates Invoices Customers	
Scheduling	4	Aller edit customers Send estimate\invoice\form from company email		
Timesheet			0	

Can Field Employee Edit Default Page

- This setting will allow the driver or mobile app user to make changes to the *Default Screen* settings of his mobile app.
- Tick the checkbox if the action will be allowed. Uncheck if the action will not be allowed.

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R Vehicle Tracking	٢		Can Driver Edit Sync Interval	8	
Reminders		Download	job Data to Mobile App with Full Sync for (days)	12	
Reports	¢	Dov	vnload History Data to Mobile App for (months)	6	
Mobile App			Default Screen	Map 🗸	
Membership			Can Field Employee Edit Default Page	0	
🗮 Inventory	٢		Sync Images only on WiFi		
PriceBooks	٢		Hide internal notes from field employees	0	
			Allow edit customers	0	

Sync Images only on WiFi

Tick the checkbox to limit syncing of images only on WiFi.

Hide internal notes from field employees

- This setting will allow the driver or mobile app user to access notes that may or may not be for office or supervisory use only.
- Tick the checkbox to disable mobile app user access to the internal notes.

Allow edit customers

This setting will give the mobile app users permission to change/edit customer data.

• Leave the checkbox unticked if the users will not be given permission to edit any customer data.

Send estimate\invoice\form from company email

- This setting will allow the mobile app user to forward or send estimates/invoices/forms from their mobile phones using their company email.
- The user will not be able to send or forward any invoice/estimate/form from the mobile app if this is left unticked.

Allow supervisors to view other field employee jobs

- This setting will provide access to supervisors to view jobs by other field employees especially those under their supervision.
- Tick the checkbox and access will be provided.

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🍰 Office Users		General						
🎇 Field Employees	٢	Sync Data with	Mobile App every (min)	5				
R Vehicle Tracking	¢	Can D	river Edit Sync Interval	8				
Reminders		Download Job Data to Mobile App v	with Full Sync for (days)	12				
Reports	¢	Download History Data to M	lobile App for (months)	6				
Mobile App			Default Screen	Мар	v			
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PriceBooks	¢	Hide internal note						
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		Can Field Employee	Edit Timesheet Entries					

Allow field employees see jobs of other employees in the history section

This will allow field employees to be able to see the job history of the current job they are working.

Can Field Employee Add Timesheet Entries

• This setting will allow the field employee mobile app users to add/create their timesheet entries.

Can Field Employee Edit Timesheet Entries

- This setting will allow the field employee mobile app users to edit their timesheet entries.
- If the checkbox is left unticked, users will not be able to edit any timesheet entries that they add.

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Membership			Can Field Employee Edit Def	ault Page 🔽					
He Inventory	¢		Sync Images on	ly on WiFi 🛛					
PriceBooks	•	Hide	internal notes from field er	mployees 🔽					
			Allow edit c	ustomers 🗌					
Scheduling	٤	Send estima	e\invoice\form from compa	any email 🔽					
Timesheet	٠	Allow supervis	ors to view other field empl	oyee jobs 🔽					
Client	۰	Can F	eld Employee Add Timeshee	et Entries 🛛	٦				
€ Integrations	¢	Can F	eld Employee Edit Timeshee						
		Alert Office User of	any Closed Records Longer	than (hr)					
		Alert Office User	f any Open Records Longer	than (hr)					
					CANC	RL SAVE			

Alert Office User of any Closed Records Longer than (hr)

This setting will send alerts/notifications to the Office Users if a record has been closed. On the field, indicate the
number of hours a record has been closed for the alert to trigger.

One alert will be sent for each closed record.

Alert Office User of any Open Records Longer than (hr)

- This setting will send alerts/notifications to the Office Users if a record has been opened. On the field, indicate the number of hours a record has been open for the alert to trigger.
- One alert will be sent for each open record.

IndusTrack MAF	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS				194	70	٥
Membership			Download	i Job Data to Mo	bile App with Ful	Sync for (days)	12							
Linventory	¢		Do	wnload History	Data to Mobile A	pp for (months)	6							
						Default Screen	Мар		~					
PriceBooks	٢													
Scheduling	۰.			Can	Field Employee Ed		~							
O Timesheet	<				Sync Imag	es only on WiFi								
Client				Hide inte	ernal notes from	field employees	2							
E Client					Allow	edit customers								
Integrations	٢		5	end estimate\in	voice\form from	company email	2							
Form settings	¢		Alle	ow supervisors t	to view other field	l employee jobs								
Templates	¢			Can Field	Employee Add Tir	nesheet Entries								
Subscription				Can Field	Employee Edit Tir	nesheet Entries								
										1				
			Alert Of	ffice User of any	Closed Records L	onger than (hr)	1							
			Alert 0	Office User of an	y Open Records L	onger than (hr)	3							
							CAN	CEL SAVE						

Snowplow Settings

Customer Search Radius (miles)

- This setting allows the driver or a field employee to search the location of their customer that lie within the set radius.
- Set the search radius in miles.

Can Driver Edit Radius

• This setting will allow the driver or field employee to revise the set search radius on their mobile app.

IndusTrack MAP	CUSTOMER	ESTIMATES SCHEDU	E INVOICES TIMESHE	T SNOWTRACK	P.O. REPORTS 🥮 📮 🙆 🔅
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Nehicle Tracking	۲				
Reminders					CANCEL SAVE
Reports	٢				
Mobile App					
Membership					

Estimate Settings

Sync Way

• This setting determines how estimates are to be synced, either one way or two way, that is from the field employee's mobile app or from and to the user's app.

Sync Period

• Select the estimate sync schedule, either weekly, monthly or per payroll period one.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE II	VVOICES TIMES	SHEET SNOWTRACK	P.O. REPORTS		🖳 🗘 😧 🔅
Company Settings	¢	General Snov	vplow Estimate	Invoice So	heduling			
Office Users					Sync Way	Two Way	~	
🗶 Field Employees	¢				Sync Period	Month	~	
R Vehicle Tracking	•							
Reminders						CANCEL SAVE		
Reports	٢							
Mobile App								
Membership								
M Inventory								

Invoice Settings

Sync Way

• This setting determines how invoices are to be synced, either one way or two way, that is from the field employee's mobile app or from and to the user's app.

Sync Period

• Select the invoice sync schedule, either weekly, monthly or per payroll period one.

IndusTrack MAP	CUSTOME	R ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		₩į (0	\$ (2)
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¥ Field Employees	٩					Sync Period	Week	~				
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Reports	¢											
Mobile App												
Membership												
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Scheduling Settings

The scheduling provides multiple job options settings. Tick the checkbox of the option for this to be true.

Allow to put the job on hold

• Setting this option as true will allow the users to put a customer job on hold from their mobile app.

Hide purchase orders in job

• Setting this option as true will deny mobile app users access to the purchase orders associated with the job.

Hide estimates in job

• Setting this option as true will deny mobile app users access to the estimates associated with the job.

Hide equipments in job

• Setting this option as true will deny mobile app users access to the equipment list associated with the job.

Hide job history in job

• Setting this option as true will deny mobile app users access to the history of the job.

Allow edit job history

- Setting this option as true will allow the users to revise or update a job's history from their mobile app.
- For this setting to work, the users must be allowed to view the job history.

IndusTrack MAP	CUSTOM	ER ESTIMATES	SCHEDULE INVOICES	TIMESHEET SNOW	TRACK	P.O. REPORTS	🖳 🗘 🗘 🏟 🚳
Company Settings	٠	General Snowpl	ow Estimate Invoice	Scheduling			
Office Users				Allow to put the job on	hold 🗹	7	
🎗 Field Employees	٢			Hide purchase orders i	in job 🛛		
R Vehicle Tracking	٠			Hide estimates i	in job 🗹		
Reminders				Hide equipments i	in job 🗌		
Reports	د			Hide job history i	in job 🗌		
Mobile App				Allow edit job hi			
Membership			Download History	Data to Mobile App for (mo	nths)	j	
🔜 Inventory	¢						
PriceBooks	۰.					CANCEL SAVE	
Scheduling	¢						

Download History Data to Mobile App for (months)

- Set how far back job historical data will be allowed to be downloaded into the mobile app.This is set in months.

IndusTrack MAP	CUSTOME	R ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS	👼 🗅 🚯 🔅
Company Settings	٢	General Snowplow Estimate Invoice Scheduling	
Office Users		Allow to put the job on hold	
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K Vehicle Tracking	٢	Hide estimates in job 🔮	
Reminders		Hide equipments in job	
Reports	¢	Hide job history in job	
Mobile App		Allow edit job history	
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