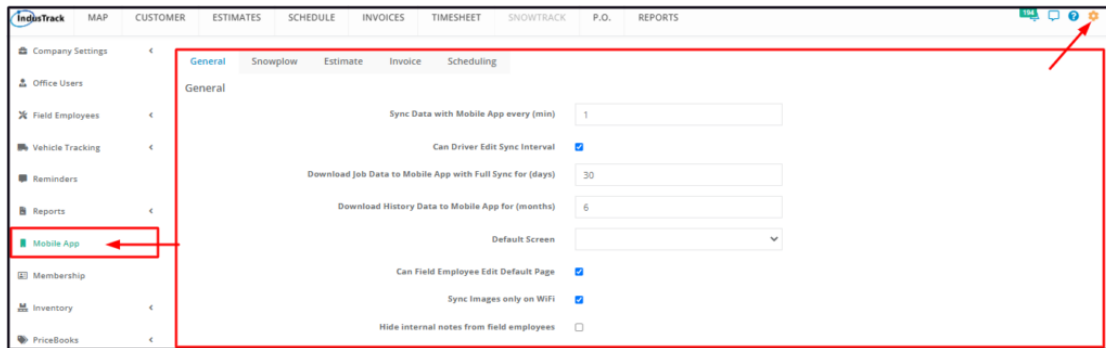


Mobile App Settings

Mobile app access and licenses are provided to field employees.

Their [login credentials and permissions](#) 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**.



General Settings

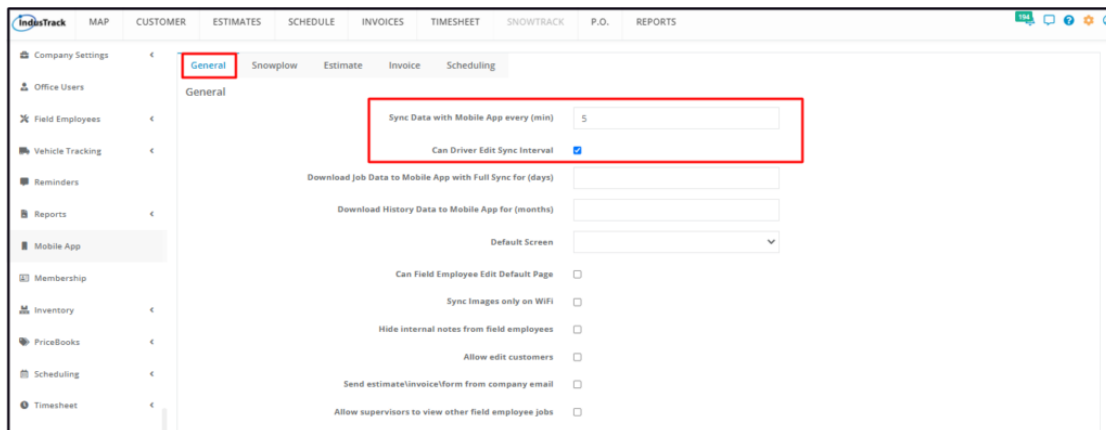
At the General tab, set up the general settings for the Mobile App.

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.

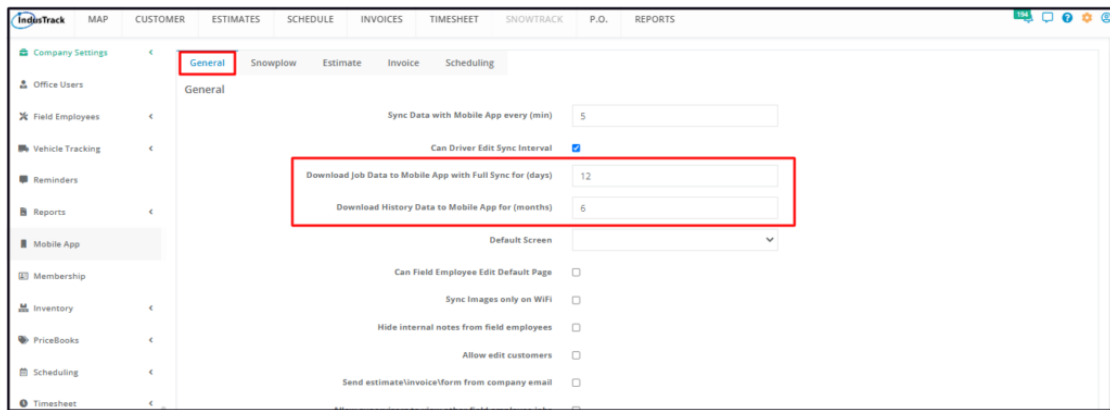


Download Job Data to Mobile App with Full Sync for (days)

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

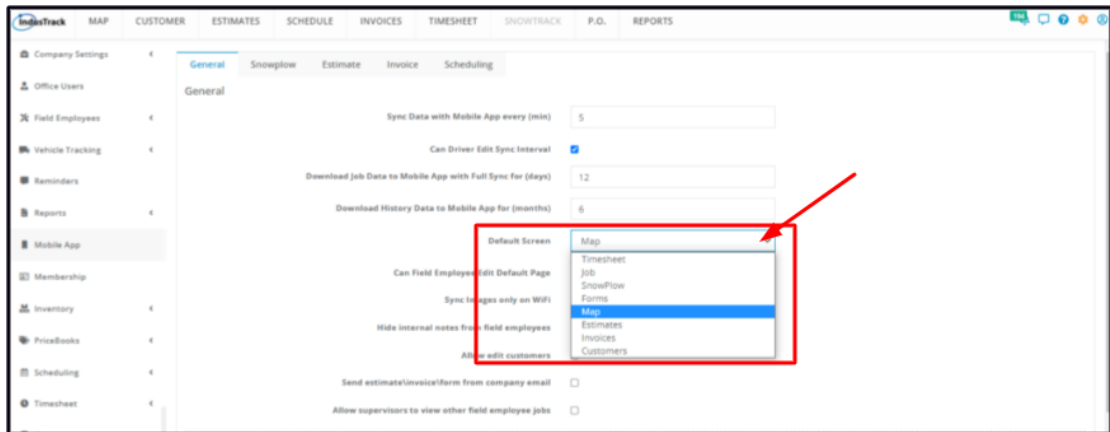
Download History Data to Mobile App for (months)

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



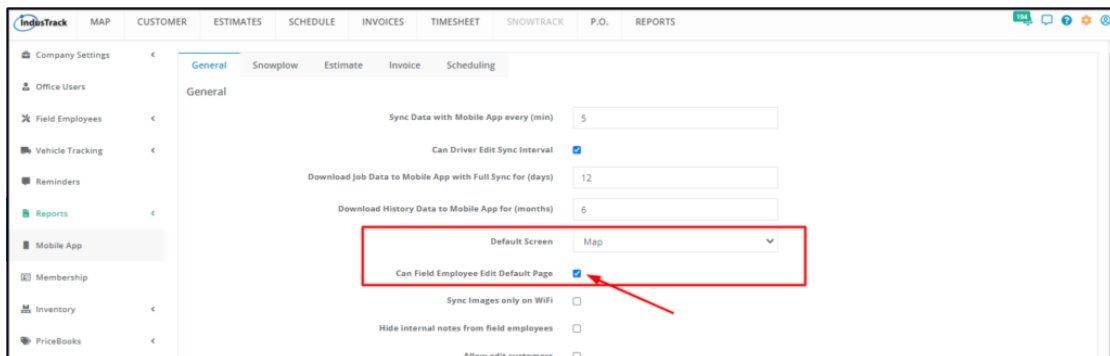
Default Screen

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



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.



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.

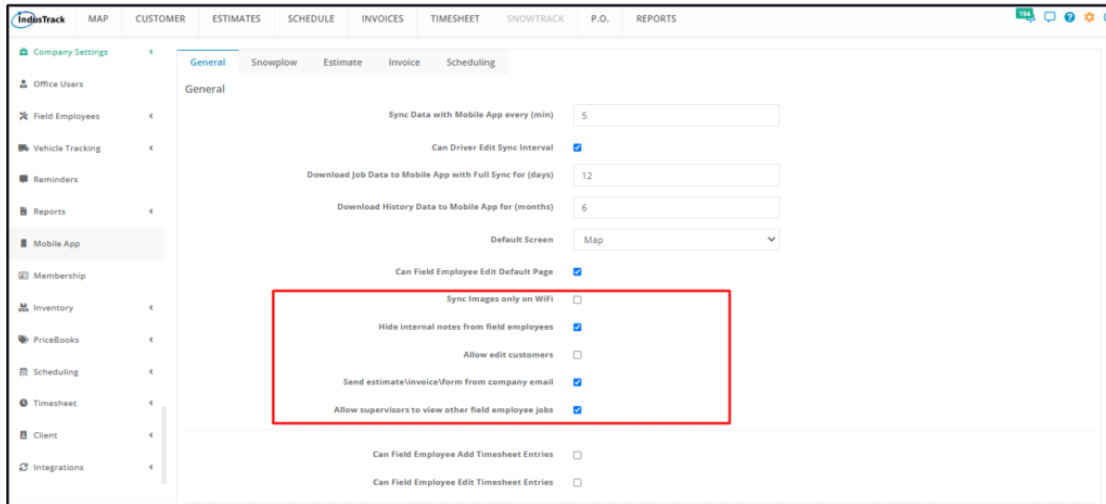
- Leave the checkbox unticked if the users will not be given permission to edit any customer data.

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.



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

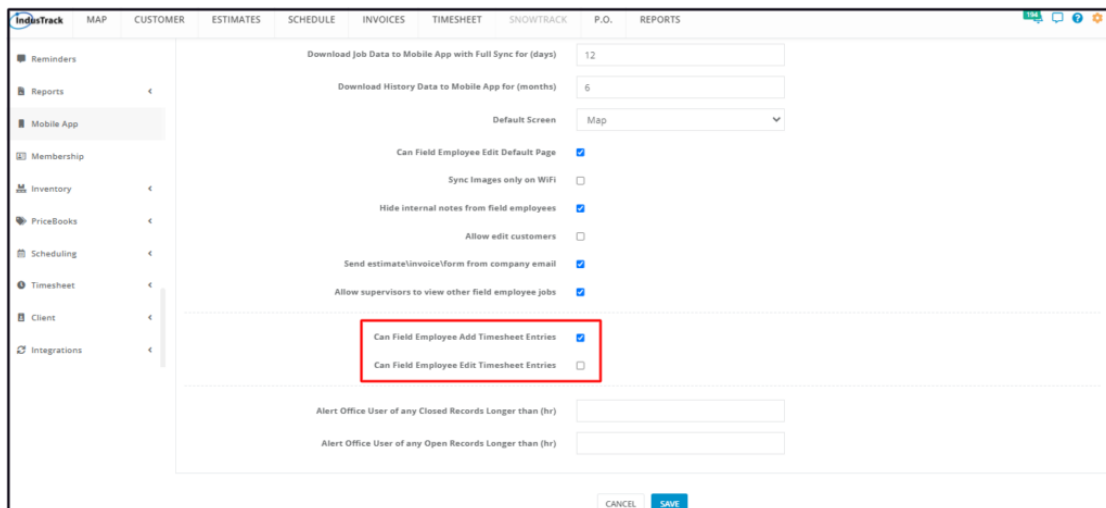
- This will allow field employees to be able to see the job history of the current job they are working.

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.



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.

The screenshot shows the IndusTrack settings interface. The left sidebar contains navigation options: Membership, Inventory, PriceBooks, Scheduling, Timesheet, Client, Integrations, Form settings, Templates, and Subscription. The main content area is titled 'Download Job Data to Mobile App with Full Sync for (days)' with a value of 12. Below this are other settings like 'Download History Data to Mobile App for (months)' (6), 'Default Screen' (Map), and various checkboxes for field employee permissions. At the bottom, two settings are highlighted with a red box: 'Alert Office User of any Closed Records Longer than (hr)' set to 1, and 'Alert Office User of any Open Records Longer than (hr)' set to 3. 'CANCEL' and 'SAVE' buttons are at the bottom right.

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.

The screenshot shows the IndusTrack settings interface with the 'Snowplow' tab selected. The left sidebar is visible. The main content area has tabs for 'General', 'Snowplow', 'Estimate', 'Invoice', and 'Scheduling'. The 'Snowplow' tab is active, showing 'Customer Search Radius (miles)' set to 0.25 and 'Can Driver Edit Radius' checked. 'CANCEL' and 'SAVE' buttons are at the bottom right.

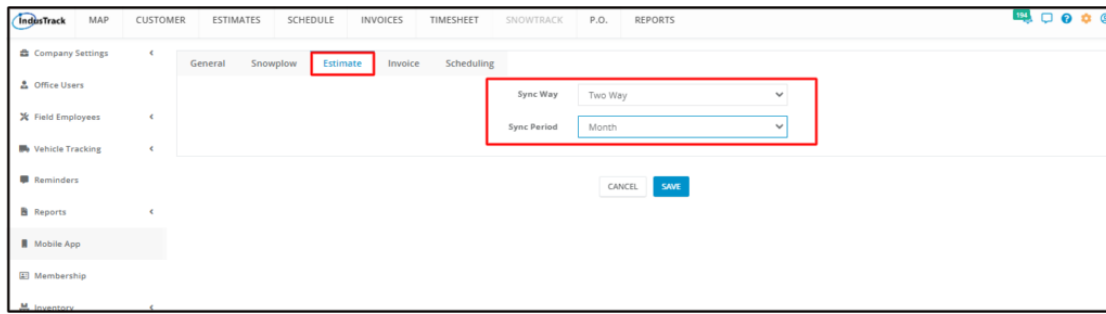
Estimate Settings

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.



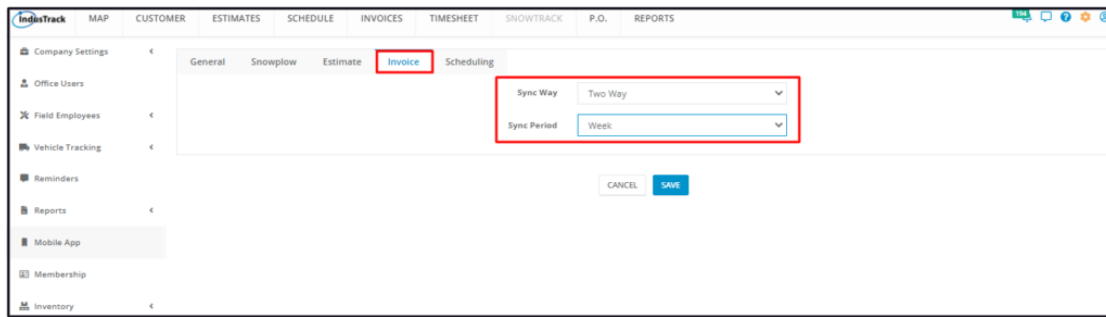
Invoice Settings

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.



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

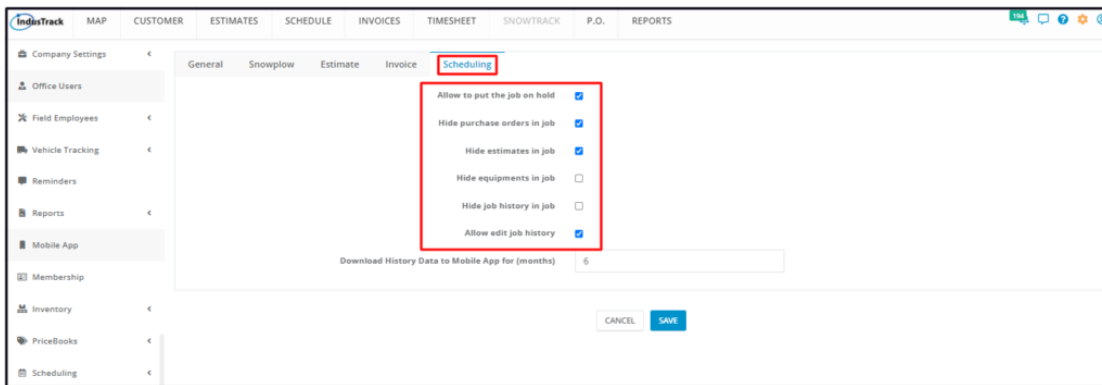
- Setting this option as true will deny mobile app users access to the equipment list associated with the job.

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.



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.

