Report Scheduling

With the Report Schedule settings, you get to set up what reports you want IndusTrack to create at a specified frequency and sent to specific team members.

To set up report schedules go to **Settings > Reports > Schedule**.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O. REPORTS				194	Ģ	∂ ≎ ©
Company S	Settings	٢											/	
🋔 Office User	rs												ACT	fions 👻
🄀 Field Empl	oyees	<	Repor	t Type		Frequency		Format	Email(S)					
			Job Re	port		Daily		PDF	jorjiwills@industrack.com					÷
🦬 Vehicle Tra	acking	¢							Items per page:	10 🐨	1 – 1 of 1	<	$\langle \rangle$	>1
Reminders	5													
🖪 Reports	-	<u> </u>												
Schedule														

The Reports Schedule page defaults to the list of report types that have already been set up and are to be sent at a specified frequency.

IndusTrack MAP	CUSTOM	ER ES	TIMATES SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🧖 🗅 🚯 🔅
Company Settings	¢									
Office Users										ACTIONS +
🗴 Field Employees	<		Report Type			Frequency		Format	Email(S)	
Vehicle Tracking	<		Daily Activity Report			Daily		PDF	support@industrack.com, raz@industrack.com	1
Reminders			Fuel Efficiency Report			Daily		PDF	support@industrack.com	1
Reports	~		Timesheet Summary Repo	n		Daily		PDF	support@industrack.com, raz@industrack.com, ryana@industrack.com	I.
Schedule			Timesheet Summary Repo	π		Weekly		PDF	ryana@industrack.com	÷
Mobile App			Timesheet In/Out Report			Daily		PDF	raz@industrack.com, kriza@industrack.com, jeff@@industrack.com, ralpht@industrack.com, johnr@industrack.com	:
Inventory	¢		Items Used			Daily		PDF	johnr@industrack.com, josea@industrack.com	÷
PriceBooks	٠								ltems per page: 10 ▼ 1 - 6 o	r6 < < >>
Scheduling										

Using the Report Schedule table

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🏨 🗘 🔇 🇯
Company Settings	<									
Office Users										ACTIONS
🎽 Field Employees	۰	Report	Туре			Frequency 1	h	Format	Email(S)	
		Job Rep	port			Daily		PDF	jorjiwills@industrack.com	÷
Vehicle Tracking Reminders	¢	Mainte	nance Log Report			Monthly		PDF	jorjiwills@industrack.com, jorjimae@gmail.com, elaineg@industrack.com	÷
Reports	~	Timesh	neet In/Out Report			Weekiy		PDF	jorjimae@gmail.com, elaineg@industrack.com	ŧ
Schedule		Timesh	neet Summary Rep	ort		Weekiy		PDF	jorjiwills@industrack.com, elaineg@industrack.com	1
Mobile App									Items per page: 10 💌 1 -	4 of 4 < < > >

The Reports Schedule table has 5 columns. Details are based on what has been entered into the scheduler.

- Report Type Refers to the specific report to be generated at the specified schedule.
- Frequency Refers to how often a specific report is to be generated and sent by the system.
- Format Refers to the report file type.
- Email(s) Refers to the officers/supervisors/team members who will receive the reports on the specified frequency.
- 3-dot Menu This is used to edit or delete a schedule.

Sort the Reports Schedule list

Click on the column header to sort the list according to the preferred field.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		19 <u>4</u> 🗘 🔇) 🌼 🙁
Company	Settings	٠.						/	•			
🚨 Office Use	ers										ACTIO	DNS 👻
⊁ Field Empl	loyees	¢	Report	Туре			Frequency	Ť	Format	Email(S)		
Kehicle Tra			Job Rep	oort			Daily		PDF	jorjiwills@industrack.com		÷
Reminder:	-	¢	Mainte	nance Log Report			Monthly		PDF	jorjiwills@industrack.com, jorjimae@gmail.com, elaineg@industrack.com		÷
Reports		*	Timesh	eet In/Out Report			Weekly		PDF	jorjimae@gmail.com, elaineg@industrack.com		i.
Schedule			Timesh	eet Summary Rep	ort		Weekly		PDF	jorjiwills@industrack.com, elaineg@industrack.com		÷.
Mobile Ap	p									Items per page: 10 💌 1 – 4 of 4	< < >	>

List Per Page

Select the number of report schedules to be displayed per page. Options to choose from are 10, 25, 50, and 100. Use the Previous and Next buttons to move from one page to another (if there is more than one page).

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🌉 🖵 😮 🌼 🤅
Company Settings	<									
Office Users										ACTIONS +
🄀 Field Employees	<	Report	Туре			Frequency		Format	Email(S)	
		Job Reg	oort			Daily		PDF	jorjiwills@industrack.com	÷
 Vehicle Tracking Reminders 	٢	Mainte	nance Log Report			Monthly		PDF	jorjiwills@industrack.com, jorjimae@gmail.com, elaineg@industrack.com	1
Reports	*	Timesh	eet Summary Rep	ort		Weekly		PDF	jorjiwills@industrack.com, elaineg@industrack.com	E.
Schedule		Timesh	eet In/Out Report			Weekly		PDF	jorjimae@gmail.com, elaineg@industrack.com	i.
Mobile App									ltems per page: 10 ▼ 1 – 4 of 4	$ \langle \langle \rangle \rangle > $

Actions Button

Use this button to add a new schedule or delete an old/obsolete one.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		194 <u>.</u> 🖓 🖓 📢
Company Settings	<									
Office Users										ACTIONS
X Field Employees	<	Report	Туре			Frequency		Format	Email(S)	+ Add New
		Job Rep	oort			Daily		PDF	jorjiwills@industrack.com	â Delete
 Vehicle Tracking Reminders 	٢	Mainter	nance Log Report			Monthly		PDF	jorjiwills@industrack.com, jorjimae@gmail.com, elaineg@industrack.com	L;
Reports	*	Timesh	eet Summary Rep	ort		Weekly		PDF	jorjiwills@industrack.com, elaineg@industrack.com	1
Schedule		Timesh	eet In/Out Report			Weekly		PDF	jorjimae@gmail.com, elaineg@industrack.com	1
Mobile App									Items per page: 10 👻 1 – 4 of 4	< < > >

Set Up a Report Schedule

From the Schedule page, click on the Actions button and select + Add New.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🧃 🗅 🔕 🔅
Company Settings	<									
Office Users										
🗴 Field Employees	<	Report	т Туре			Frequency		Format	Email(S)	+ Add New
Vehicle Tracking	<	Daily A	activity Report			Daily		PDF	support@industrack.com, raz@industrack.com	Telete
Reminders		Fuel Ef	fficiency Report			Daily		PDF	support@industrack.com	:
Reports	~	Times!	heet Summary Rep	ort		Daily		PDF	support@industrack.com, raz@industrack.com, ryana@industrack.com	÷
Schedule		Times!	heet Summary Rep	ort		Weekly		PDF	ryana@industrack.com	1
Mobile App		Times!	heet In/Out Report			Daily		PDF	raz@industrack.com, kriza@industrack.com, jeffa@industrack.com, ralpht@industrack.com, johnt@industrack.com	:
L Inventory	¢	Ltems I	Used			Daily		PDF	johnr@industrack.com, josea@industrack.com	1
PriceBooks	<								Items per page: 10 💌 1 – 6	of 6 < < > >
Scheduling										

On the **Report Scheduler** window, set up the schedule or the frequency of when a specific report type should be generated and who should receive it.

Report Scheduler		
Report Type	Not Selected	•
Create Report	Daily	•
	Exclude Weekends	
Format	PDF	•
Send To		•
	Value required	

Report Type

Select the type of report you would like to schedule from the drop-down list. The list contains different reports from Vehicles to Financials to Scheduling and more.

Report Scheduler	×
Report Type	Timesheet Overtime Report
	Scheduling
Create Report	job Report
	Items Used
Format	Vehicle Tracking
	Customer Activity Report
Send To	×
	CANCEL SAVE

Depending on the selected type, additional information will have to be provided.

- Select which field employees or field employee groups will be included in the following reports:
 - Timesheet Reports
 - Job Report
 - Snowtrack Reports

Report Scheduler							×
	Report Type	Timesheet In/Out Report	•][Employees 4 SELECTED		
	Create Report	Daily	•		Q Filter		
		Exclude Weekends			□ {Group — HVAC Insatallation ▲ Team}		
	Format	PDF	Ŧ		Group — HVAC Service & Re pair Team}		
	Send To		•		□ {Group — Jorji Group} ☑ [1] Peter Richards		
		Value required			 [2] Dylan Frost [3] Aron Piper 		
					🗌 [4] Charles Brown		
					🗹 [5] Steven Newsome 👻		
						CANCEL	SAVE

Vehicles or Vehicle Groups are selected for the following reports:

• Vehicle Tracking Reports

Report Scheduler			×
Report Type	Maintenance Log Report 👻	Vehicles 3 SELECTED	
Create Report	Daily -	Q Filter	
	Exclude Weekends	☐ {Group — South West Fleet} ▲ ☐ {Group — North East ACU Fleet} et}	
Format	PDF -	Group — South West Electric al Fleet}	
Send To	•	001] mu-X 1 002] Ford Raptor 1	
	Value required	[002] Ford Kaptor 1 [003] Tow Truck 3	
		☑ [004] Cargo Van 1 ☑ [005] Cargo Van 2	
		·	
			CANCEL SAVE

- Select which Inventory Items are selected for the following reports:
 Items Used Report

Report Scheduler				×
	Report Type	Items Used 👻	Inventories 35ELCCTED	
	Create Report	Daily	Q. Filter Tri revos j. Concrete siae [118952] Counter	
	Format	PDF 👻	[118952] Door Frame [112457] Drywall [258474] Duct Work	
	Send To	Value required	[29873] Electrical Installation service [117456] Electrical Materials [265451] Floor Plans [25873] Flooring v	
			CANCEL	

• No additional options are required for the Financials Reports.

Report Scheduler			X
1	Report Type	Accounts Receivable 👻	
Cri	eate Report	Daily	
		Exclude Weekends	
	Format	PDF 👻	
	Send To	*	
			CANCEL SAVE

If all of the field employees, vehicles, or inventories are to be included in the report tick the checkbox for Select All. This will auto-select all items on the list.

Report Scheduler			د
Report Type	Timesheet In/Out Report	•	Employees ALL SELECTED
Create Report	Daily	•	Q. Filter
Format	Exclude Weekends PDF	Ŧ	Select All Group – All Hands on Deck Group) Group – HVAC Insatallation Team)
Send To		•	2 (Group — HVAC Service & Re pair Team)
	Value required		[Group - Jorji Group) [1] Peter Richards [2] Dylan Frost [1 3] Jaron Diner
			CANCEL SAVE

Create Report

Select the reporting frequency or how often should the report be created and sent to the recipients. Options are daily, weekly and monthly.

Report Scheduler				×
	Report Type	Timesheet In/Out Report 👻	Employees 7SELECTED	
Ι Γ	Create Report	Daily		
		Weekly		
		Monthly		
L	Format	PDE *		
	Send To	•		
		Value required		
			CANCEL	

If *Daily* is selected as the frequency, indicate if the report will also be sent during the weekends. If the preference is not to send the report on weekends, tick the checkbox of **Exclude Weekends**. Leave this box unchecked if weekend reports are preferred.

Report Scheduler				×
Rep	port Type	Timesheet In/Out Report 👻	Employees 7 SELECTED	
Creat	te Report	Daily 👻		
		Z Exclude Weekends		
	Format	PDF 💌		
	Send To	•		
	N	Value required		
				CANCEL SAVE

Format

The default format of the reports is PDF.

Report Scheduler					×
	Report Type	Timesheet In/Out Report	•	Employees 7 SELECTED	
	Create Report	Daily	•		
		Exclude Weekends			
	Format	PDF	Ŧ		
	Send To		•	-	
		Value required			
				CA CA	ANCEL SAVE

Send To

Select the recipient(s) of the generated report.

Report Scheduler				х
	Report Type	Timesheet In/Out Report	-	Employees 75ELECTED
	Create Report	Daily	Ŧ	
		Z Exclude Weekends		
	Format	PDF	Ŧ	
	Send To	Krzsijindustrack.com Jeffs@industrack.com schazejput@gmail.com ralpht@industrack.com johnr@industrack.com aibern@industrack.com ruthg@industrack.com		
				CANCEL SAVE

Enable the report schedule by saving. This will be added to the list.

	х
Timesheet In/Out Report 👻	Employees
	7 SELECTED
Daily	
✔ Exclude Weekends	
PDF -	
Sucer(s) celecter(
	N
	\sim
	CANCEL SAVE
	Daily 👻

Edit a Report Schedule

Want to change the reporting frequency or add another field employee? Simply edit the current report schedule.

Find the report schedule to be edited from the list. Click the 3-dot menu and select Edit.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🔓 🖵 🕄 🌼	9
Company Settings	٠										
a Office Users										ACTIONS +	·
💥 Field Employees	<	Report	Туре			Frequency		Format	Email(S)		
	<	Daily A	ctivity Report			Daily		PDF	support@industrack.com, raz@industrack.com	:	
Reminders		Fuel Ef	ficiency Report			Daily		PDF	support@industrack.com		
Reports	~	Timesh	neet Summary Rep	port		Daily		PDF	support@industrack.com, raz@industrack.com, ryana@industrack.com	🖌 Edit	
Schedule		Timesh	neet Summary Rep	port		Weekly		PDF	ryana@industrack.com		4
Mobile App		Timesh	neet In/Out Report			Daily		PDF	raz@industrack.com, kriza@industrack.com, jeffa@industrack.com, ralpht@industrack.com, johnr@industrack.com	I	
🗮 Inventory	¢	L Items (Jsed			Daily		PDF	johnr@industrack.com, josea@industrack.com	÷	
PriceBooks	٢								litems per page: 10 ▼ 1 – 6 o	re < < > >	

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

Delete a Report Schedule

Find the report schedule to be removed from the list. Click the 3-dot menu and select Delete.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🤞 🗅 🕲 🌣
Company Settings	•									
Office Users										ACTIONS -
🎗 Field Employees	¢	Report	Туре			Frequency		Format	Email(S)	
🛤 Vehicle Tracking	¢	Daily A	ctivity Report			Daily		PDF	support@industrack.com, raz@industrack.com	1
Reminders		Fuel Eff	ficiency Report			Daily		PDF	support@industrack.com	
Reports	~	Timesh	eet Summary Rep	ort		Daily		PDF	support@industrack.com, raz@industrack.com, ryana@industrack.com	Edit
Schedule		Timesh	eet Summary Rep	ort		Weekly		PDF	ryana@industrack.com	💼 Delete
Mobile App		Timesh	eet In/Out Report			Daily		PDF	raz@industrack.com, kriza@industrack.com, jeffa@industrack.com, ralpht@industrack.com, johnr@industrack.com	i
Linventory	<	Lems L	Jsed			Daily		PDF	johnr@industrack.com, josea@industrack.com	÷
PriceBooks	¢								Items per page: 10 💌 1 -	6 of 6 < < > >

A confirmation window will come up. Select **Yes** to delete or **Cancel** to abandon the action.

IndusTrack MAP	CUSTOMER	R ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		📮 🖵 😧 🌣 🙁
Company Settings	¢									
🚨 Office Users										ACTIONS +
💥 Field Employees	¢	Repo	rt Type			Frequency		Format	Email(S)	
Nehicle Tracking	<	Daily	Activity Report			Daily		PDF	support@industrack.com, raz@industrack.com	÷
Reminders		E Fuel I	Efficiency Report			Daily		PDF	support@industrack.com	:
Reports	~	Time	sheet Summary Rep	ort	Warnin	ng!)F	support@industrack.com, raz@industrack.com, ryana@industrack.com	÷
Schedule		Time:	sheet Summary Rep	ort		0		DF	ryana@industrack.com	:
Mobile App					Are you	sure you want to dele	ete report scheo	iule?	raz@industrack.com, kriza@industrack.com,	1
Mobile App Membership		Time:	sheet In/Out Report			CANCEL	YES)F	jeffa@industrack.com, ralpht@industrack.com, johnr@industrack.com	
🗮 Inventory	¢	L Items	Used			Daily		PDF	johnr@industrack.com, josea@industrack.com	:

The report schedule will be removed from the list.