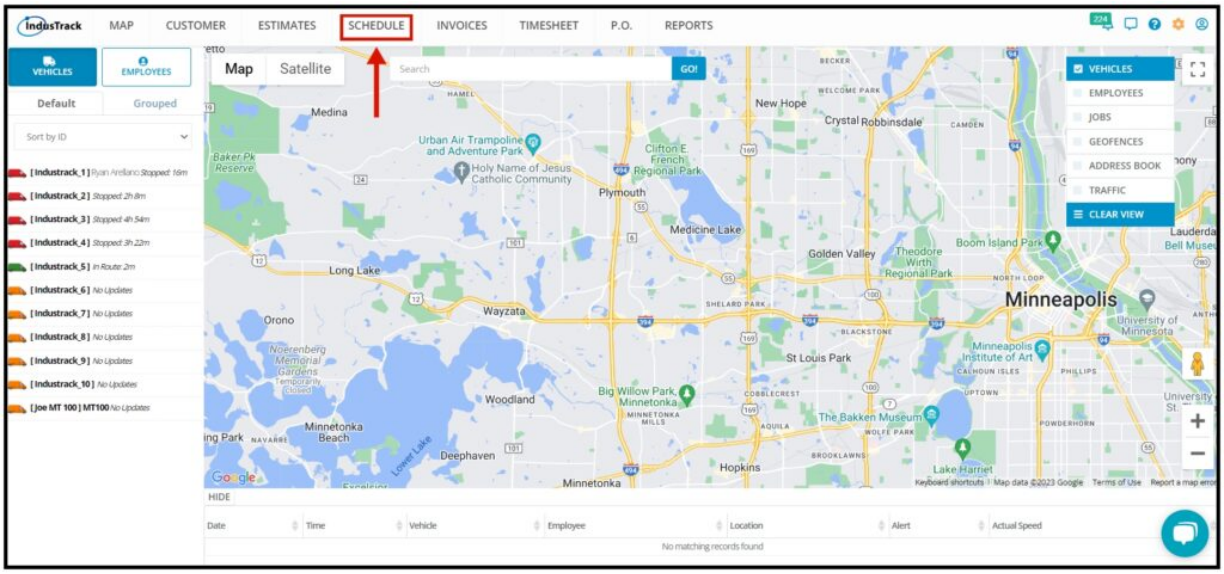
Schedule Module

To work on your **field employees' schedules and job assignments** in IndustrackTrack, go to **Schedule** on the module header. If the header is grayed out, you do not have any access to the module. If it does not appear on the header, your company account does not have access to it.

From the schedule page, you will be able to view your field employees' job schedules and create jobs for them.

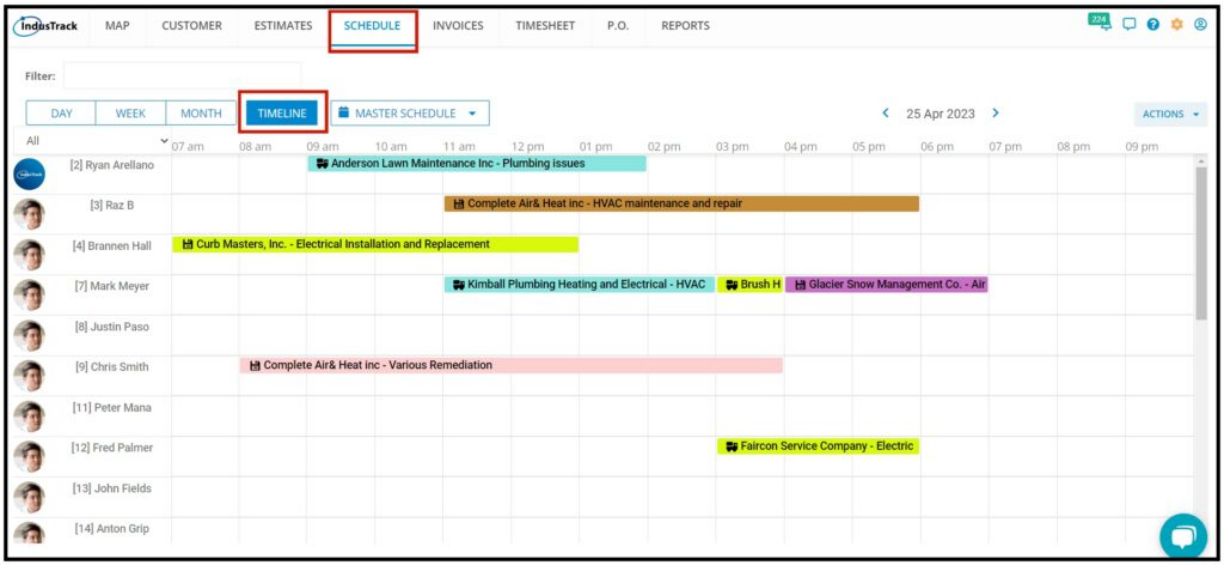
The rules for the Schedule module – Schedule Settings, Calendar Views, Job Colors, Service Types, and Task Templates are set up at the back end, specifically the schedule settings page.



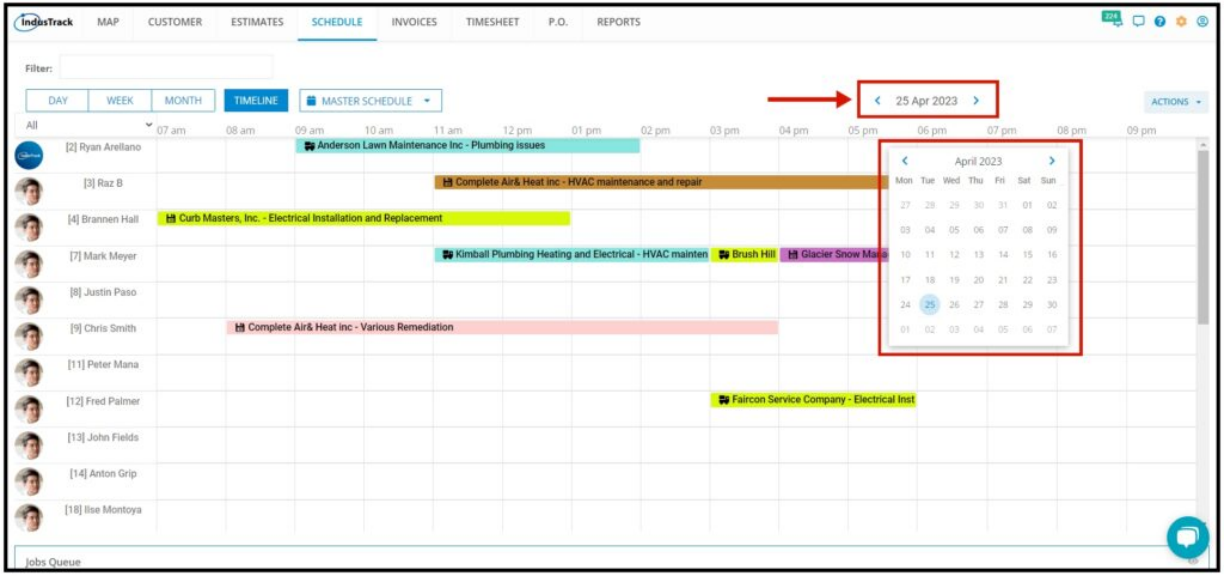
Timeline View

By default, you will see the scheduling grid for all of your field employees broken down by hours for the current day. This is called the **Timeline View.**

All of your field employees are listed on the grid, with or without any scheduled job to their name. The jobs assigned to them for the day will be plotted on the grid and color-coded according to the job. To learn more about creating job colors, go to the Settings page of Schedules.

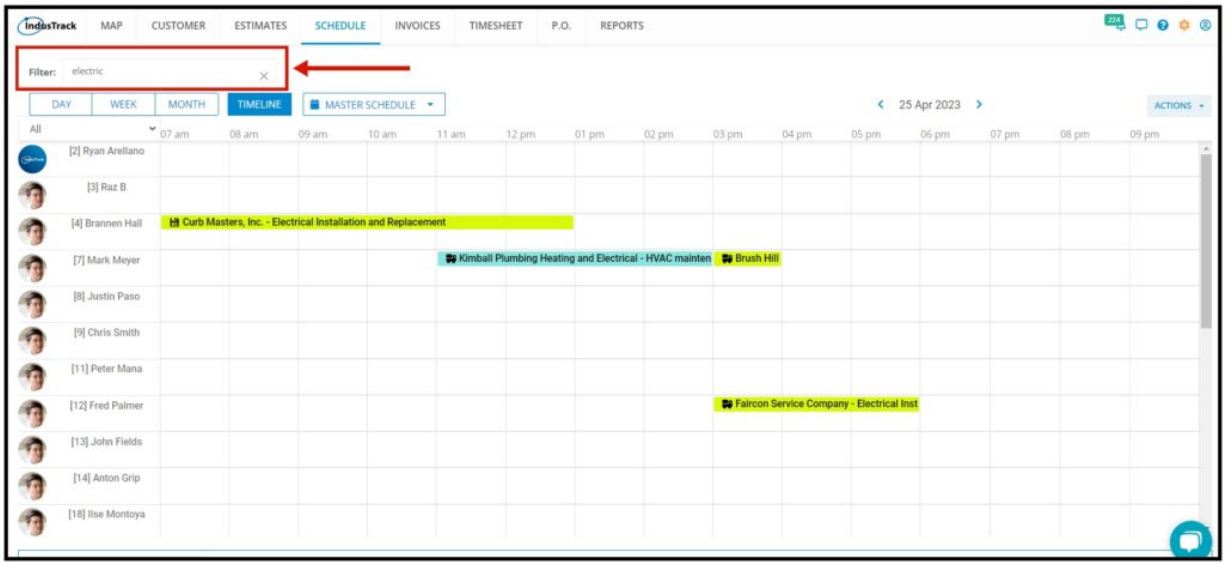


If you want to jump to a different date, click on the date and choose the specific day you want to view. Or click the arrows next to the date to jump forward or backward one day, week, or month depending on your selected view.

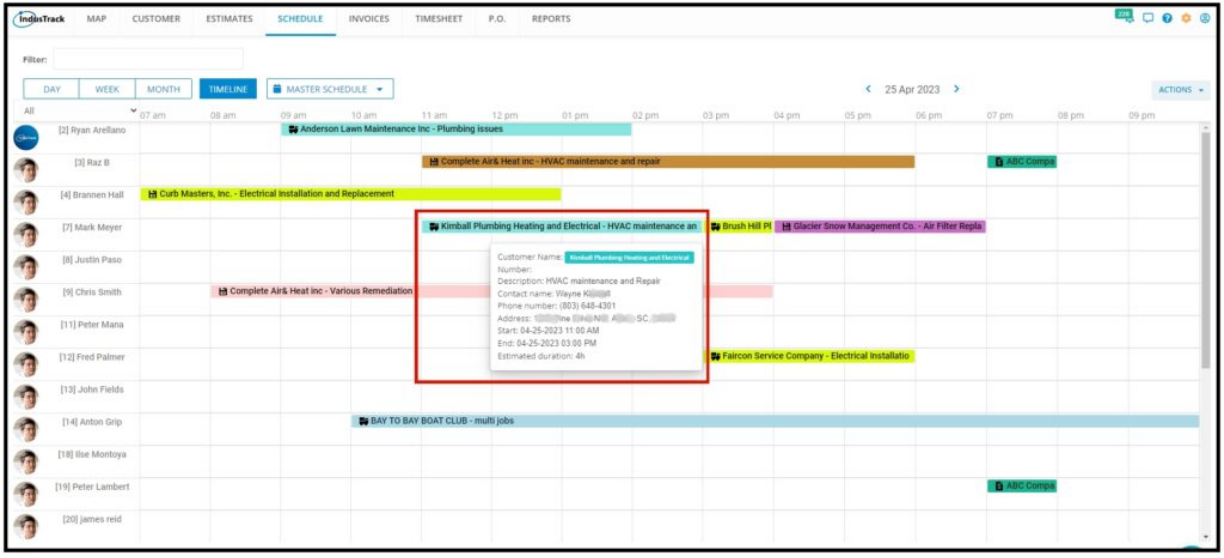


If you wish to see the schedule for just a certain field employee group, you can select that group from the drop-down list of groups. Only field employees belonging to that group will be shown on the calendar.

Use the search bar to display only specific job types, customer jobs, and field employees' jobs on the calendar.



If you want to view the job details, hover over the job. The details will come up.



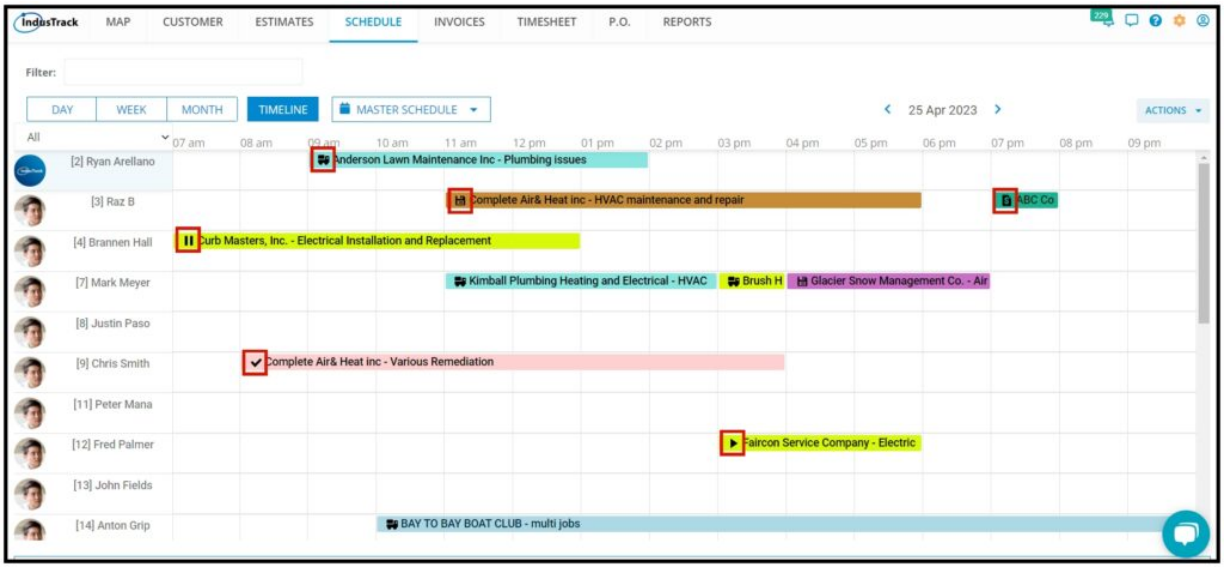
Job Colors and Job Status

For quick identification of job types, these are color-coded on the calendar, Job colors are assigned at job creation but these are set up at the backend, specifically on the Schedules settings page.

The current status of the jobs, represented by icons, is also displayed on the calendar. Job statuses and icons include:

- Job Created/Saved – Computer diskette icon
- Job Dispatched – Truck icon
- Job Started – Play button icon
- Job Paused – Pause button icon
- Job Complete – Checkmark icon
- Job Declined – X icon
- Job is invoiced – Dollar sign Icon

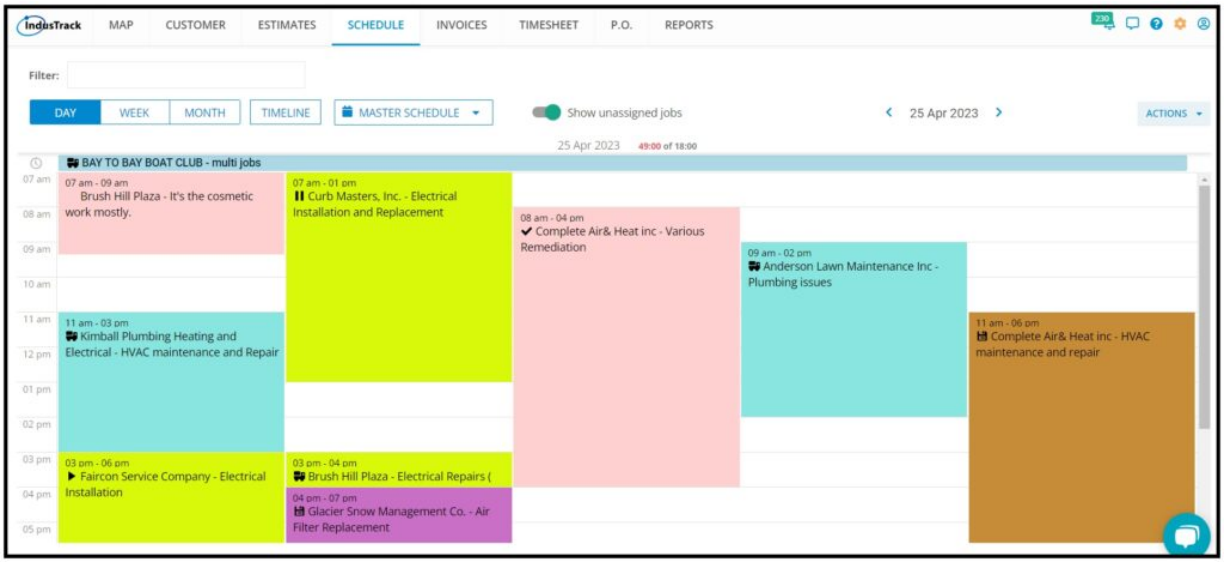
Icons on the calendar automatically change when a status is updated by either the office user or the field employee.



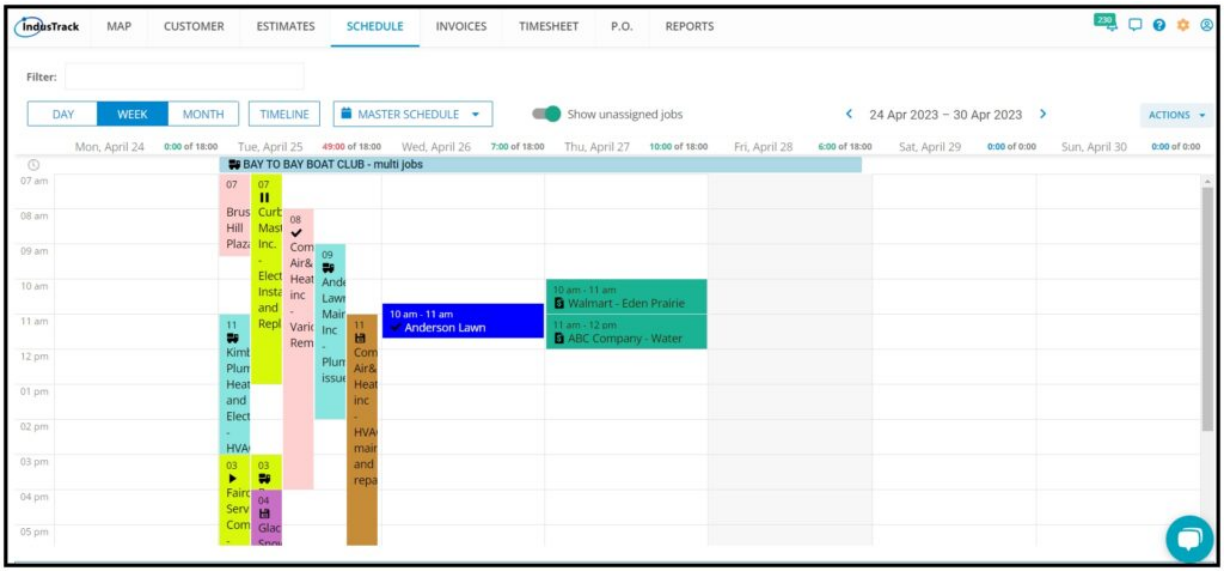
Other Views

You can also view your company's jobs for the day, the week, or the month. Select the preferred calendar view option at the upper left-hand corner of the page. The same schedules will be plotted on the calendar but not specific to the assigned field employee. Hover over the job to see the details, including the assigned field employees.

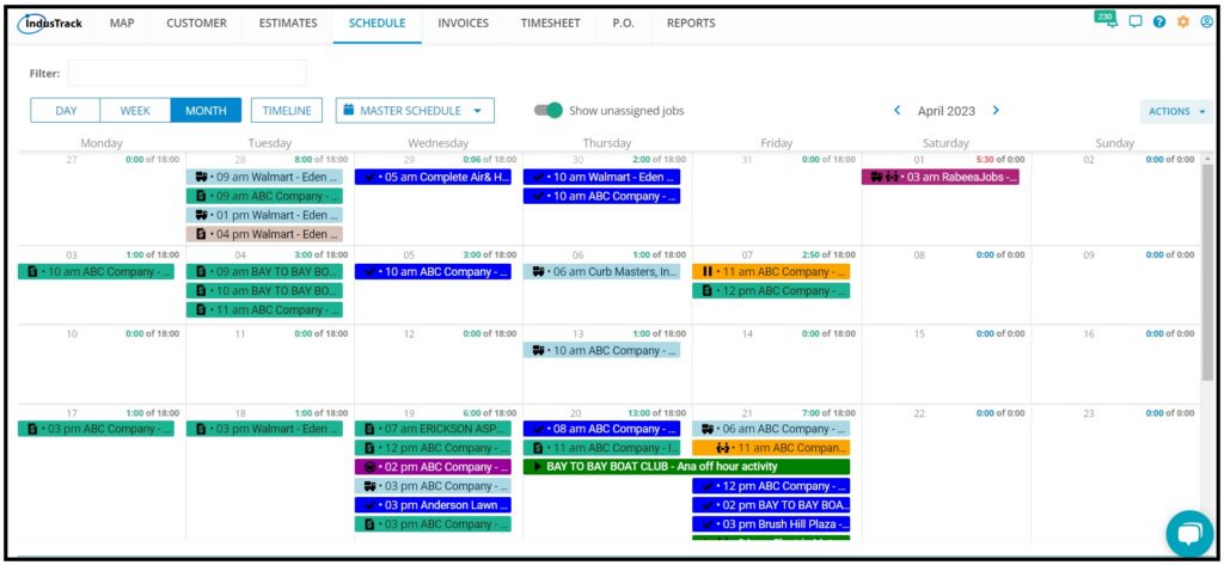
Day View



Week View



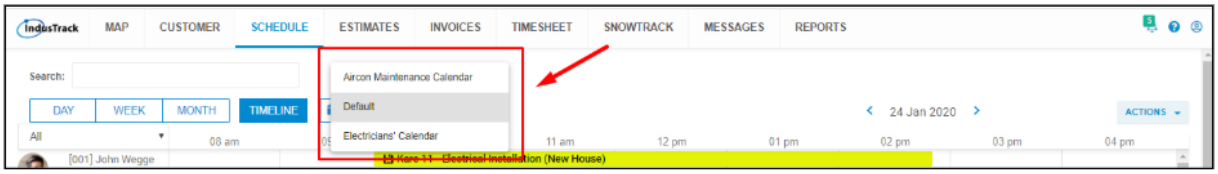
Month View



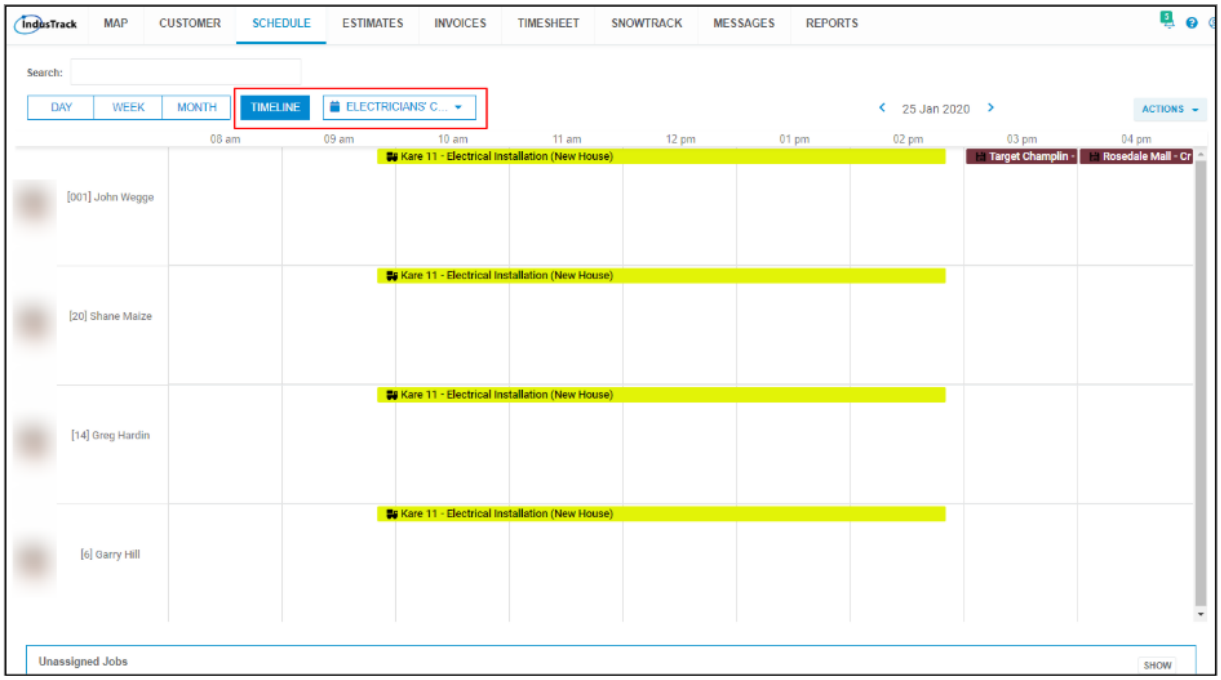
Custom Calendars

You can also view the different calendars that you have created from the schedule settings page. To learn more about creating calendars, go to the Schedules settings page.

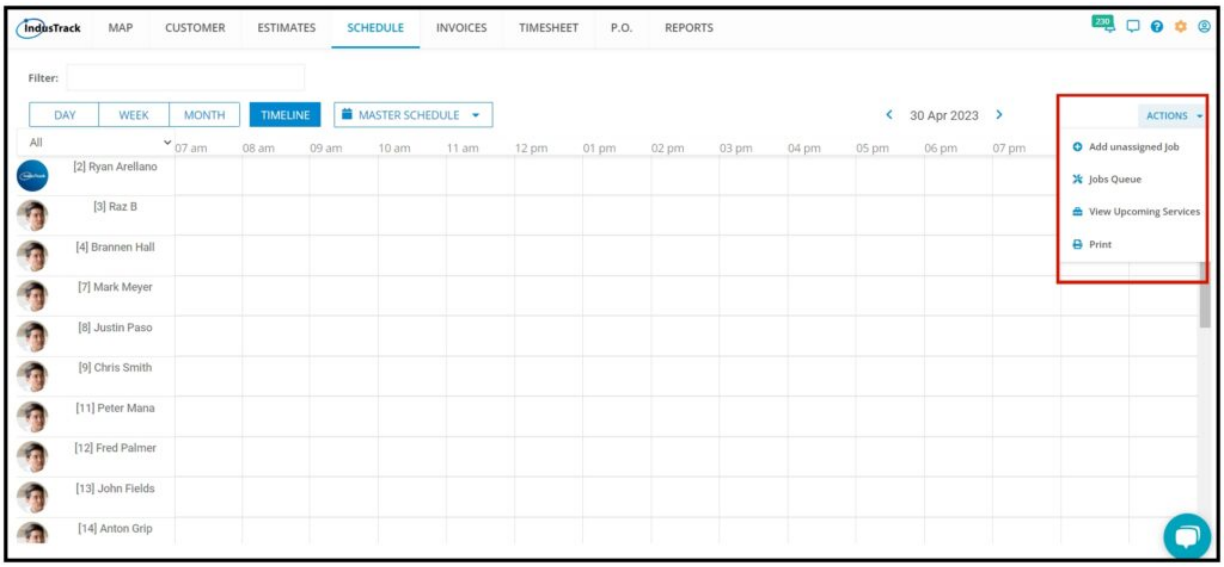
Click on the **arrow down** for the calendar list and select the one you want to view.



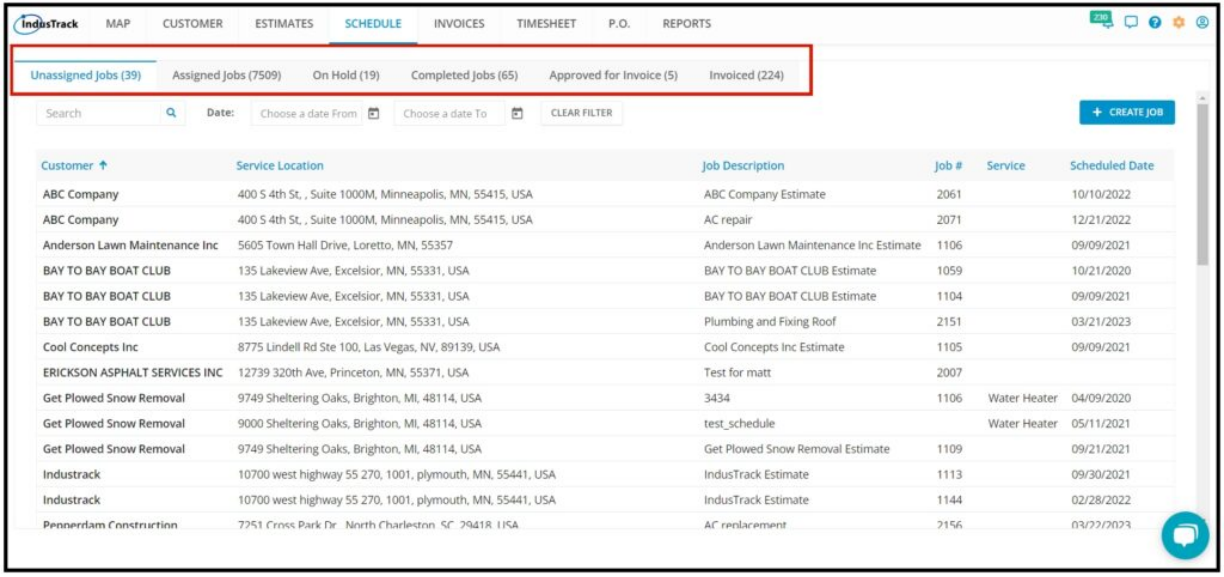
The schedules that will be displayed on the custom calendar will be those for the field employees who belong to the employee groups assigned to the calendar. You can also add new jobs directly to these calendars.



Actions Button



- Add unassigned Job – Add and save a job that is not assigned to a field employee.
- Job Queues – where you can see all the jobs with different statuses (unassigned, assigned, On Hold, Completed Jobs, Approved for Invoice Jobs, Invoiced Jobs)


IndusTrack
MAP
CUSTOMER
ESTIMATES
SCHEDULE
INVOICES
TIMESHEET
P.O.
REPORTS
230
Unassigned Jobs (39)
Assigned Jobs (7509)
On Hold (19)
Completed Jobs (65)
Approved for Invoice (5)
Invoiced (224)
Search
Date:
Choose a date From
Choose a date To
CLEAR FILTER
+ CREATE JOB
Customer
Service Location
Job Description
Job #
Service
Scheduled Date
ABC Company | 400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415, USA | ABC Company Estimate | 2061 | | 10/10/2022
ABC Company | 400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415, USA | AC repair | 2071 | | 12/21/2022
Anderson Lawn Maintenance Inc | 5605 Town Hall Drive, Loretto, MN, 55357 | Anderson Lawn Maintenance Inc Estimate | 1106 | | 09/09/2021
BAY TO BAY BOAT CLUB | 135 Lakeview Ave, Excelsior, MN, 55331, USA | BAY TO BAY BOAT CLUB Estimate | 1059 | | 10/21/2020
BAY TO BAY BOAT CLUB | 135 Lakeview Ave, Excelsior, MN, 55331, USA | BAY TO BAY BOAT CLUB Estimate | 1104 | | 09/09/2021
BAY TO BAY BOAT CLUB | 135 Lakeview Ave, Excelsior, MN, 55331, USA | Plumbing and Fixing Roof | 2151 | | 03/21/2023
Cool Concepts Inc | 8775 Lindell Rd Ste 100, Las Vegas, NV, 89139, USA | Cool Concepts Inc Estimate | 1105 | | 09/09/2021
ERICKSON ASPHALT SERVICES INC | 12739 320th Ave, Princeton, MN, 55371, USA | Test for matt | 2007 | |
Get Plowed Snow Removal | 9749 Sheltering Oaks, Brighton, MI, 48114, USA | 3434 | 1106 | Water Heater | 04/09/2020
Get Plowed Snow Removal | 9000 Sheltering Oaks, Brighton, MI, 48114, USA | test_schedule | | Water Heater | 05/11/2021
Get Plowed Snow Removal | 9749 Sheltering Oaks, Brighton, MI, 48114, USA | Get Plowed Snow Removal Estimate | 1109 | | 09/21/2021
Industrack | 10700 west highway 55 270, 1001, plymouth, MN, 55441, USA | IndusTrack Estimate | 1113 | | 09/30/2021
Industrack | 10700 west highway 55 270, 1001, plymouth, MN, 55441, USA | IndusTrack Estimate | 1144 | | 02/28/2022
Pepperdam Construction | 7251 Cross Park Dr, North Charleston, SC, 29418, USA | AC replacement | 2156 | | 03/22/2023