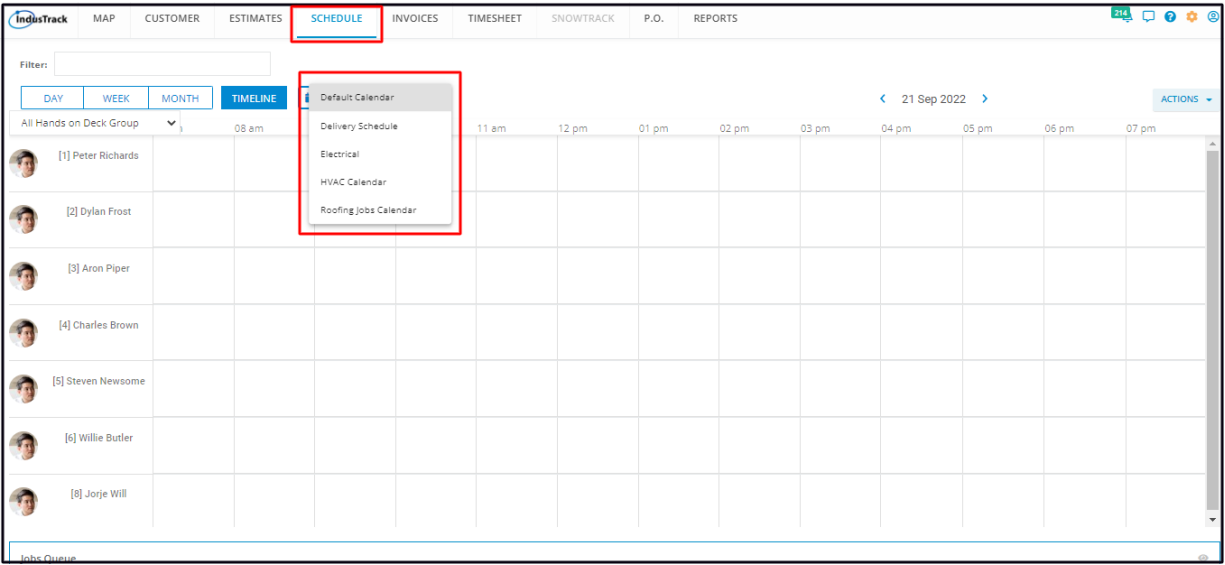
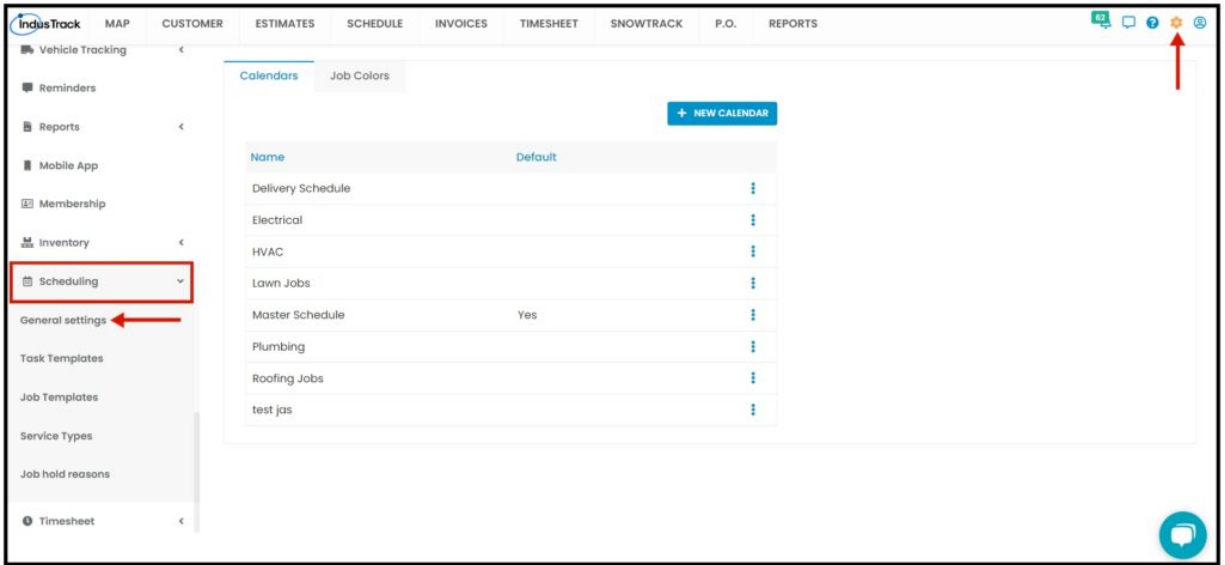


# Schedule Settings: Calendar Views

**Calendars** are the schedule grids that can be selected, used and viewed from the Schedule module.

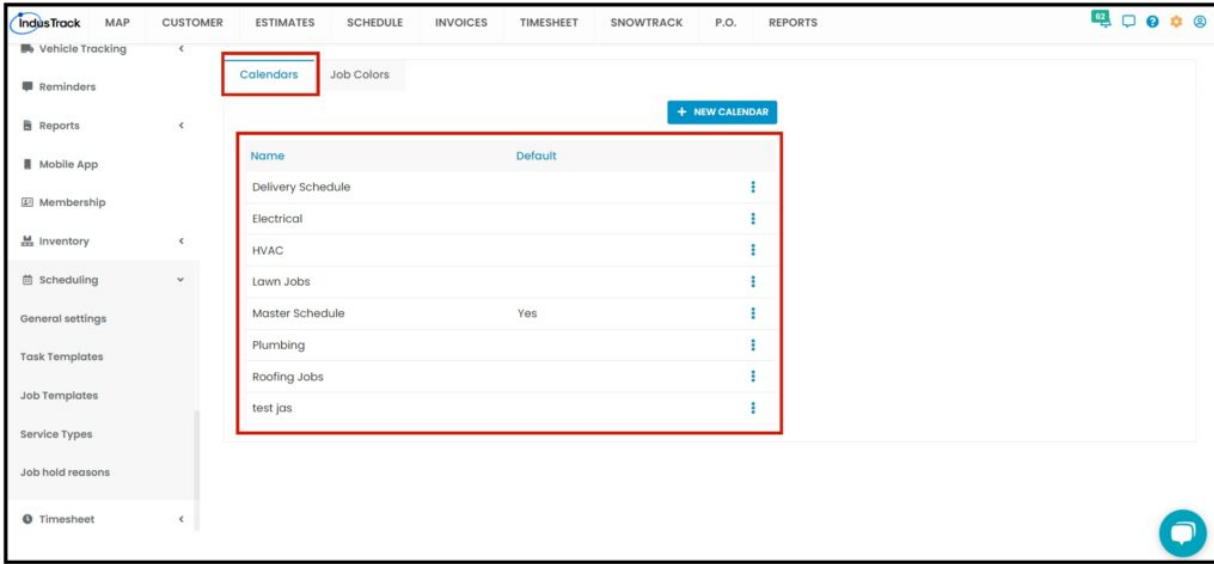


To set up and manage Calendar Views, go to **Settings > Scheduling > General Settings > Calendars**.



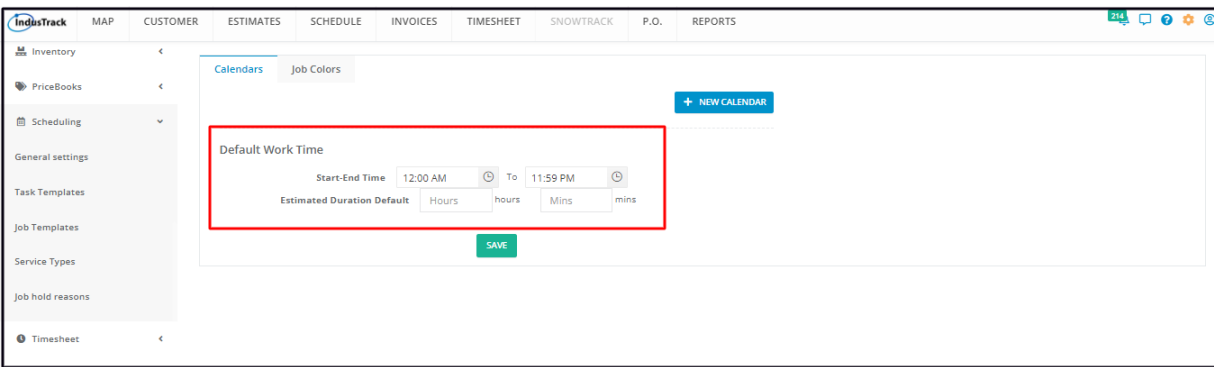
## Calendars List

The Calendars page defaults to the list of Calendar Views that have already been created, presented in table format. If no Calendar View has been created, the page will display the settings of the Default Calendar.

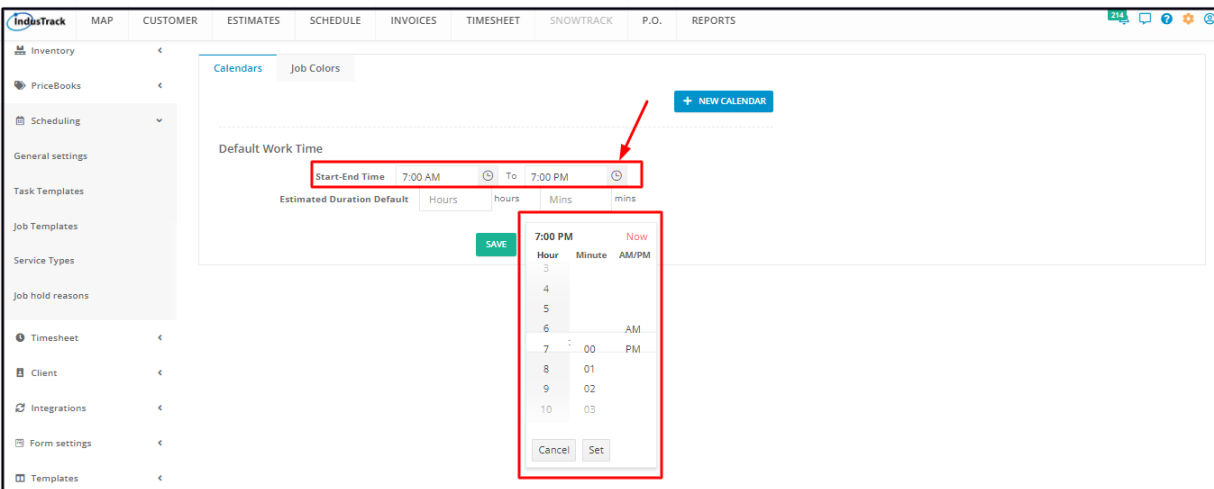


## Default Calendar

IndusTrack's Default Calendar View's work time is set from 12:00 AM to 11:59 PM.



Edit the **Start and End times** of the default scheduling grid as may be preferred. To do this, key in the times on the fields or use the time pickers.



Set a **default estimated job duration** if preferred. This estimate is for a single job.

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

Inventory PriceBooks Scheduling General settings Task Templates Job Templates Service Types Job hold reasons Timesheet Client

Calendars Job Colors + NEW CALENDAR

Default Work Time

Start-End Time 7:00 AM To 7:00 PM

Estimated Duration Default 3 hours 30 mins

SAVE

**Save** the revised settings of the default Calendar. The calendar will be named **Default Calendar**. To rename this, open the view in edit mode and update the name as needed.

## Calendar List/Table

When at least one custom calendar view has been created, the Calendars page will now default to the Calendars list presented in table format. This is also the page where these calendars are created and managed.

The table lists all Calendar Views that have been created, including the default one.

The table has 3 columns:

- **Name** – This refers to the name assigned/given the Calendar View.
- **Default** – This column shows which of the views is the default one. If it is, a “Yes” is indicated in this column. All other views will have nothing indicated under this.
- **3-dot menu** – This icon is used to **Edit** or **Delete** a Calendar View.

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Inventory PriceBooks Scheduling General settings Task Templates Job Templates Service Types Job hold reasons Timesheet Client

Calendars Job Colors + NEW CALENDAR

Name	Default	
Default Calendar	Yes	
Delivery Schedule		
Electrical		
HVAC Calendar		
Roofing Jobs Calendar		

## + New Calendar button

- This button is used to **create** a new custom Calendar View.

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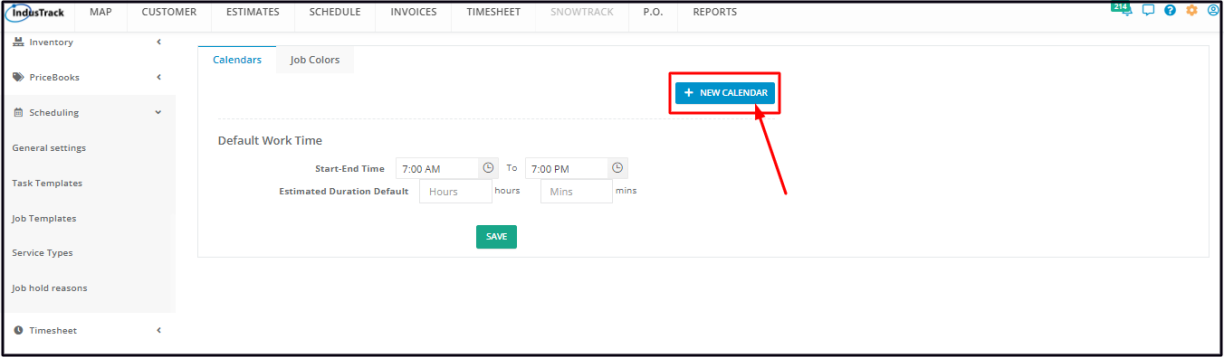
Inventory PriceBooks Scheduling General settings Task Templates Job Templates Service Types Job hold reasons Timesheet Client

Calendars Job Colors + NEW CALENDAR

Name	Default	
Default Calendar	Yes	
Delivery Schedule		
Electrical		
HVAC Calendar		
Roofing Jobs Calendar		

## Create a Calendar View

To create a custom calendar view, go to the **+ New Calendar button**.

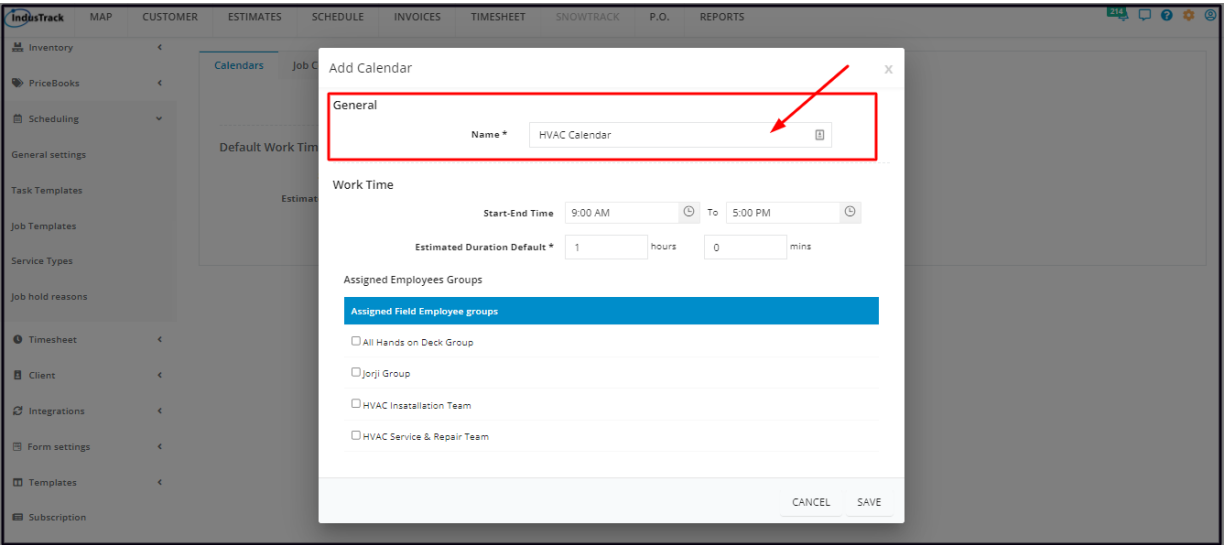


Fill in the Calendar View details on the **Add Calendar** window. Fields with \* are required.

### General Details

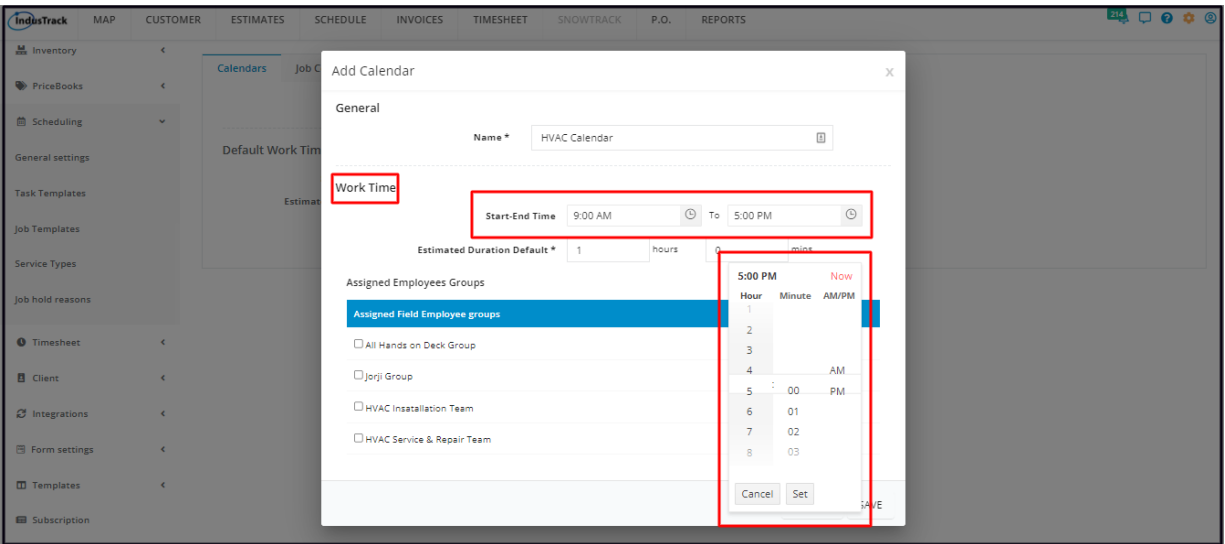
#### Name\*

- Key in the assigned name of the calendar.



### Work Times

- Default **Start and End times** are set from 9:00 AM to 5:00 PM. Edit these as may be preferred. To do this, key in the times on the fields or use the time pickers.



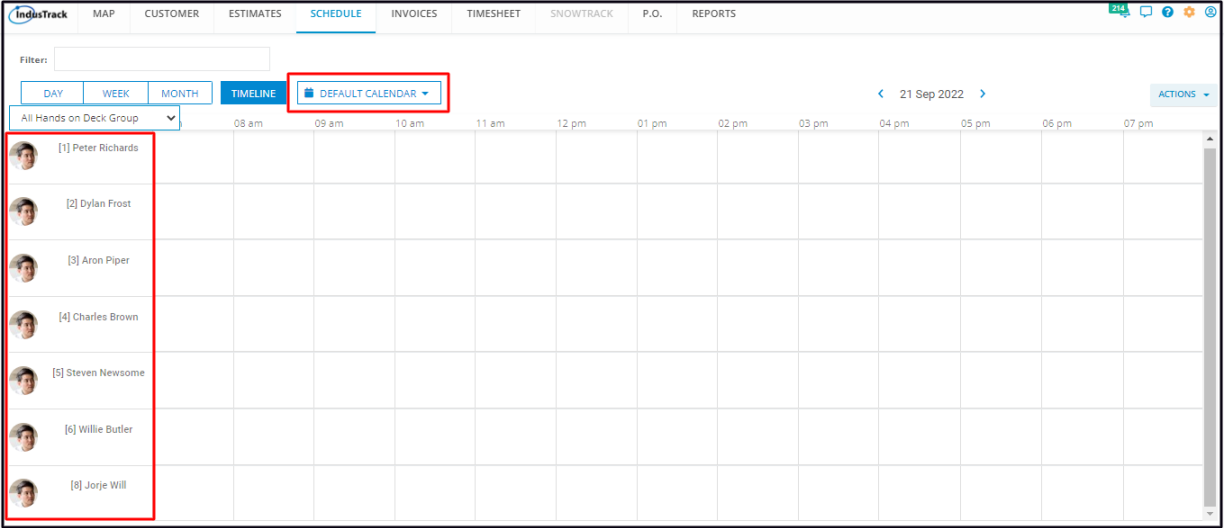
- A default 1-hour duration for a single job is already set. Edit the **default estimated job duration** if preferred.

## Assigned Employees Groups

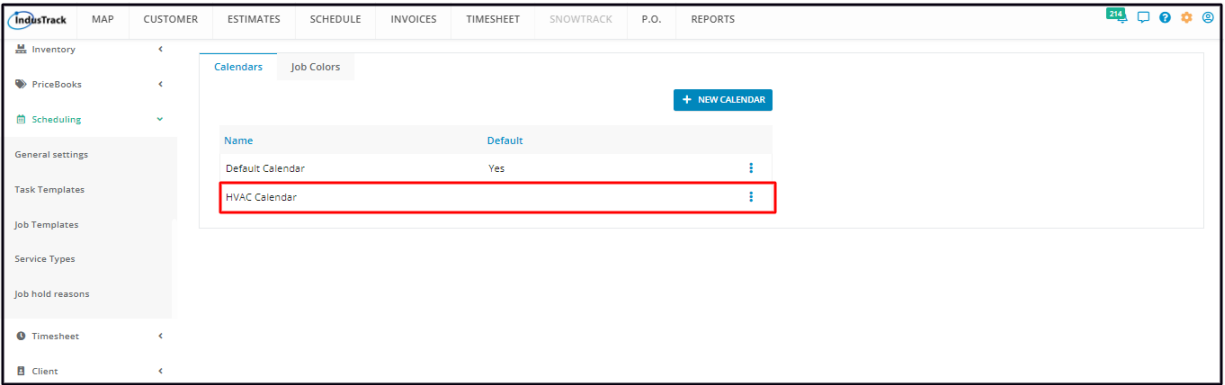
- From the list of Field Employee Groups, select those that will be included in the Calendar. Select a group or more.

- Assigning Field Employee Group(s) is not a requirement when creating a Calendar View. However, this view can not be used in the Schedule Module. You will be asked to assign field employees first when the view is selected.

- The Default Calendar View is the only one that has no assigned Field Employee Groups. All Field Employees will be included in the Calendar when viewed.



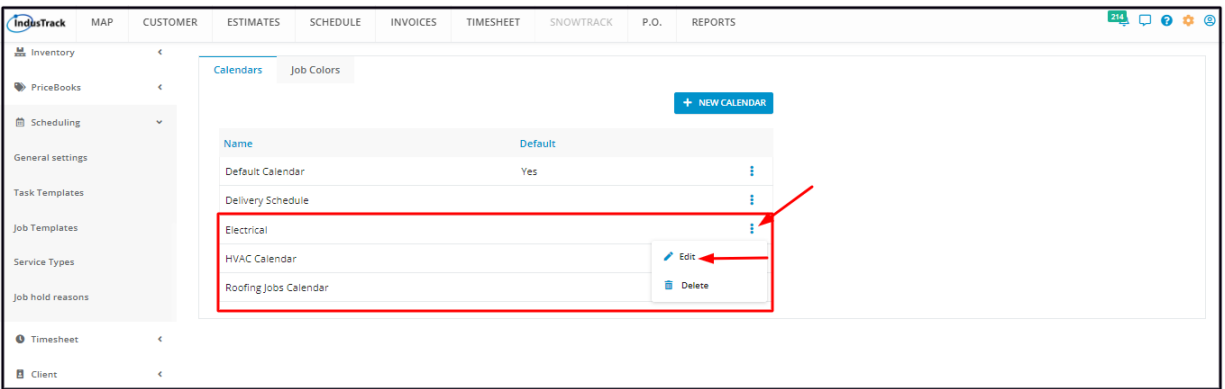
**Save** the new Calendar View. This will be added to the Calendars list.



## Edit A Calendar View

Find the Calendar View to be updated from the list.

Click the 3-dot menu to its right and select **Edit**.



Update the details from the Edit Calendar window as needed. Once done, **Save** the changes.

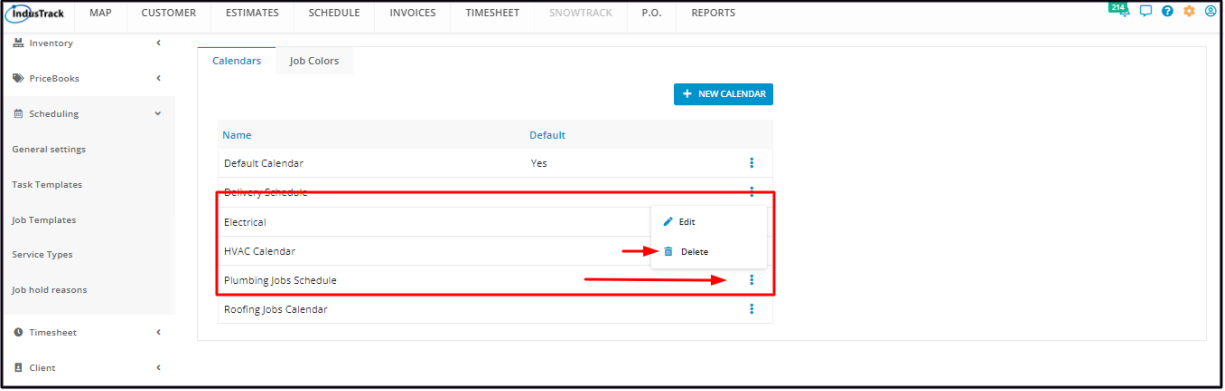
## Delete A Calendar View

*Delete a Calendar View that is no longer in use or was created in error. It is wise to exercise caution when using this function. Deleting a Calendar View may have an effect on other functions, settings or data. This action can not be undone.*

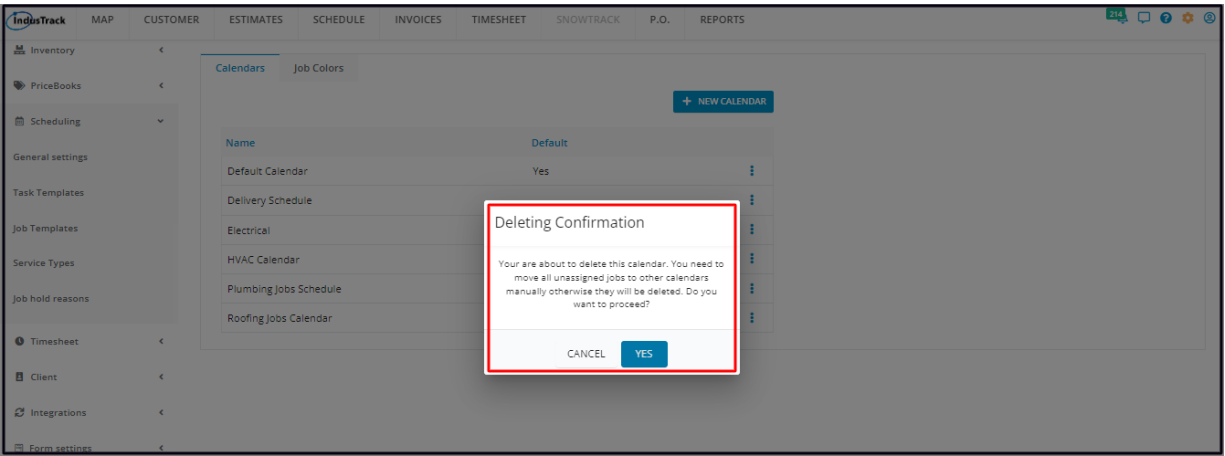
*Before deleting a Calendar View, move any unassigned jobs to other calendars. Otherwise, these jobs will be deleted once the calendar is removed.*

Find the Calendar View to be deleted from the list.

Click the 3-dot menu to its right and select **Delete**.



A delete warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.



The Calendar View will be removed from the list.

