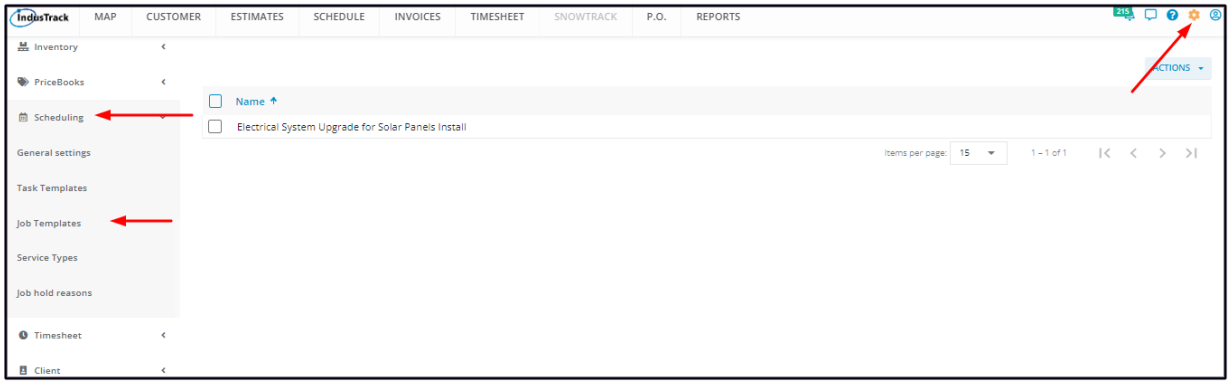
Schedule Settings: Create and Manage Job Templates

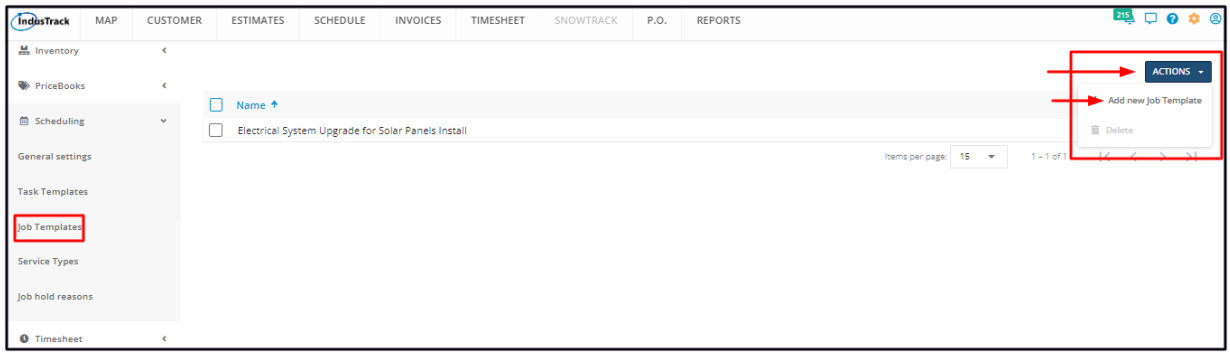
Create **Job Templates** to quickly use them in your Jobs. Load a saved job template for ease of documentation and report generation.

To set up and manage Job Templates, go to **Settings > Scheduling > Job Templates.**

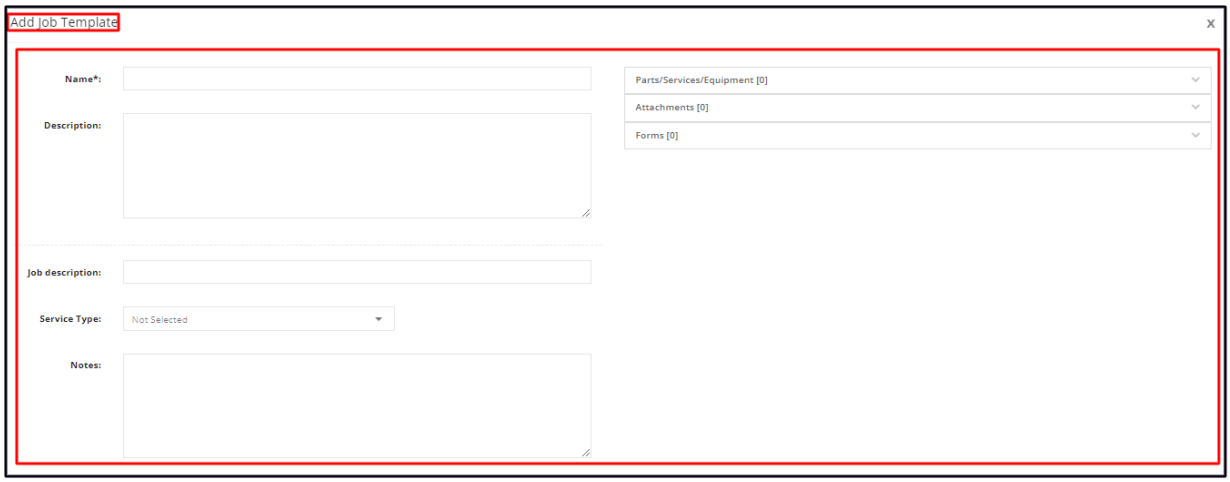


Create a Job Template

To create a new Task Template, go to the **Actions button**. Click on it and select **+ Add New Job Template** from the drop-down.

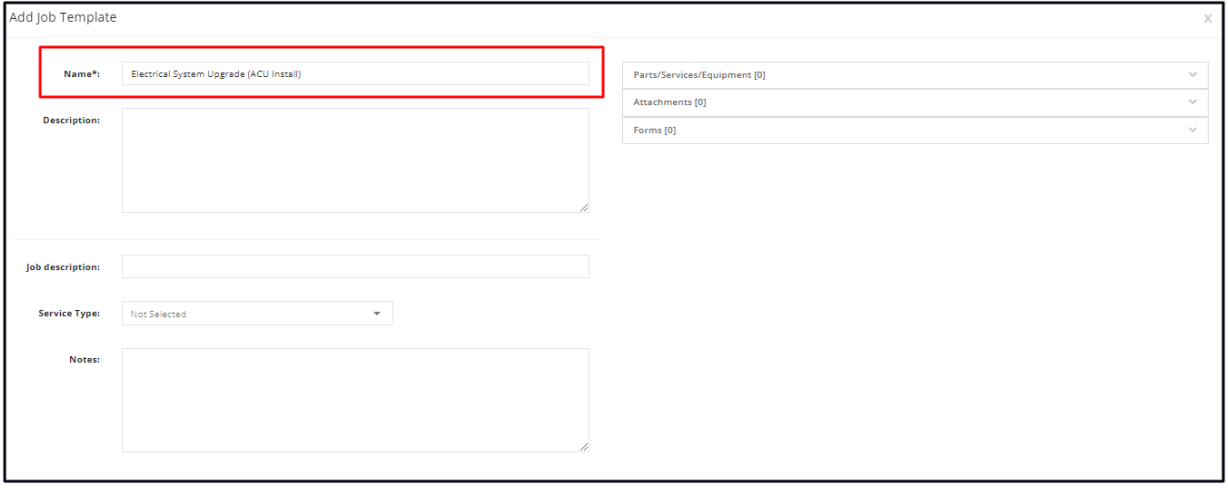


Fill in the Job Template details on the **Add Job Template window**. Fields with * are required.



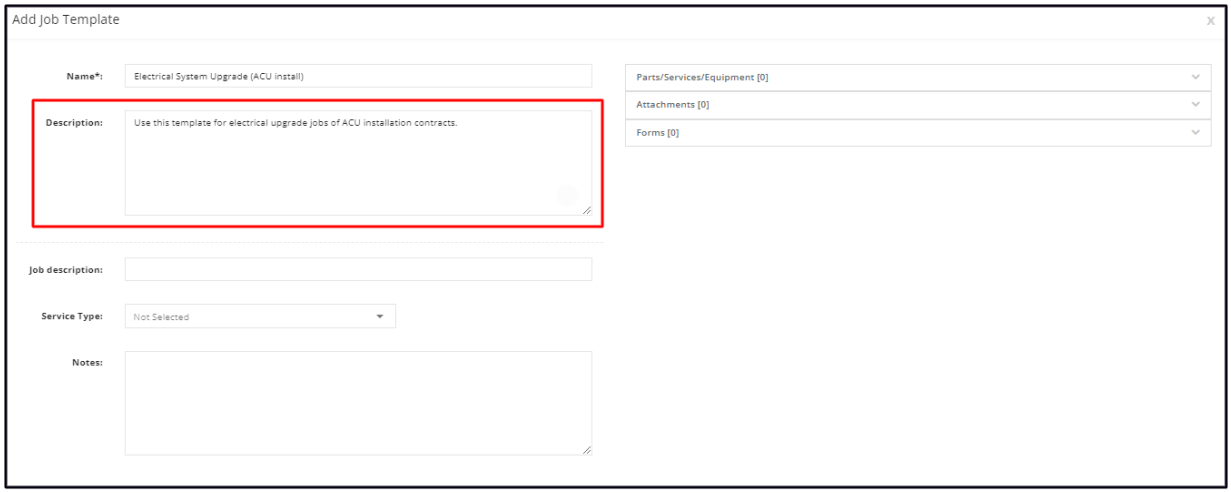
Name*

Give the Job Template a name/title.



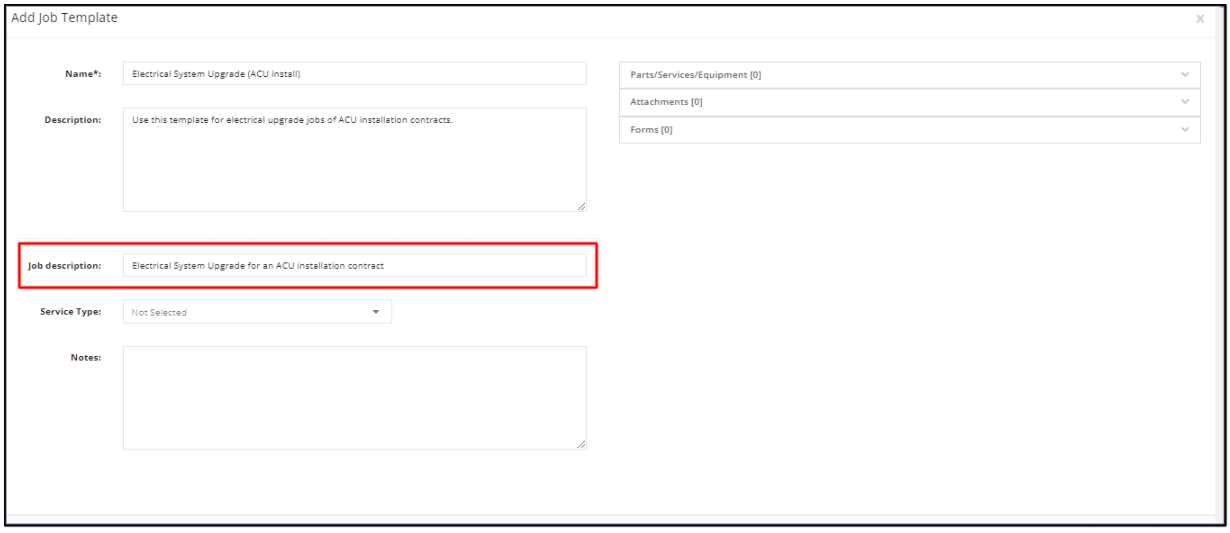
Description

Key in a description of the template.



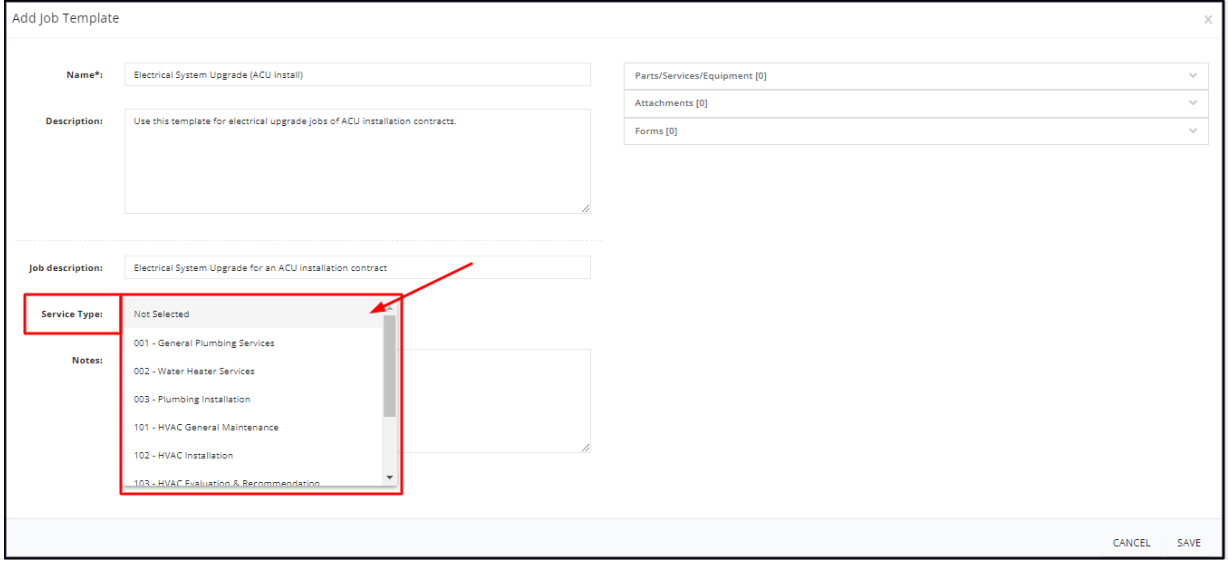
Job Description

Key in a short description of the job.



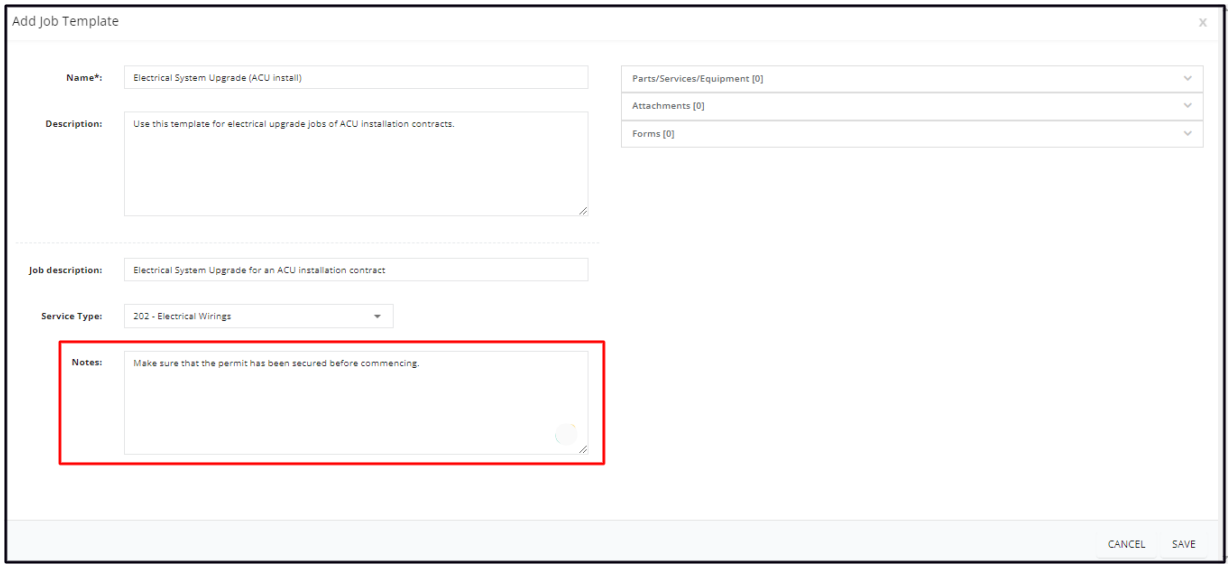
Service Type

Select the correct one from the drop-down list.



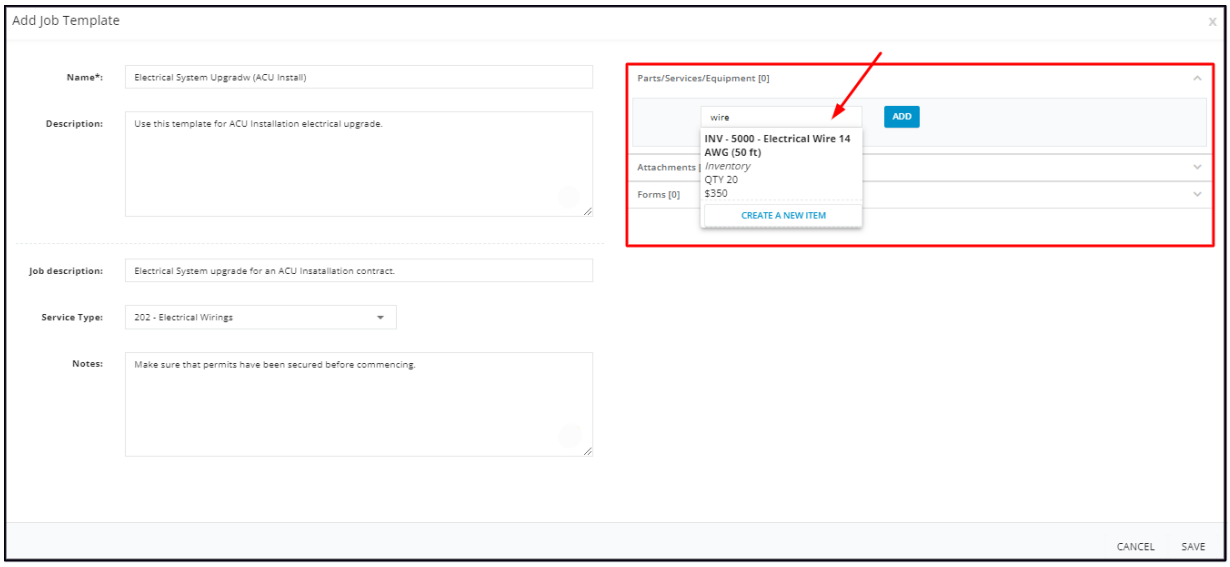
Notes

Key in a note, a reminder or special instructions on the Notes field.

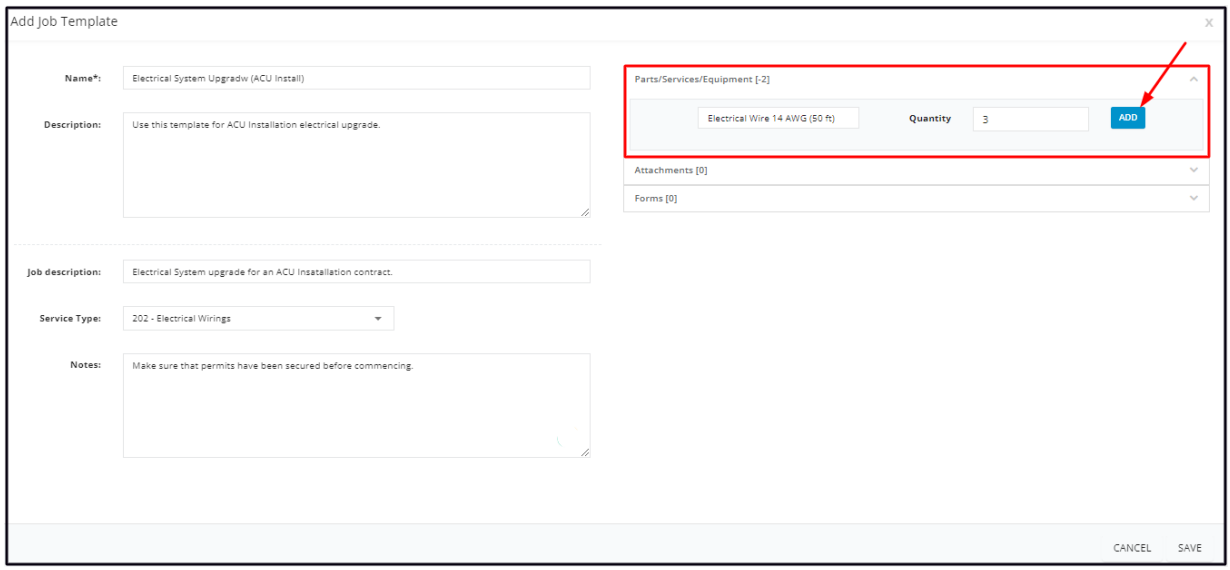


Parts/Services/Equipment

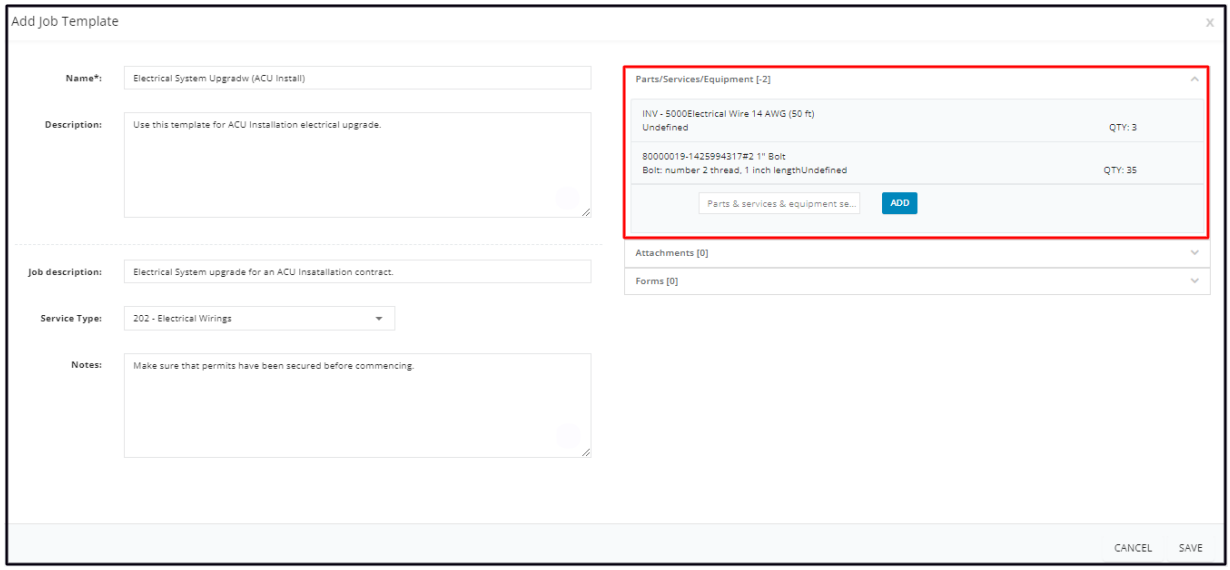
- Click on the field to expand.
- Key in the item name on the field. Whenever applicable select:
  - The part or material (inventory or non-inventory) to be used in the performance of the task.
  - The service to be performed to complete the task.
  - The assembly to be used to complete the task.
  - The equipment to be installed.



- For each part/service/assembly/equipment selected, set the **quantity** to be used.
- Click the **Add** button to the right of the quantity.
- This will add the selected item with quantity to the job template.



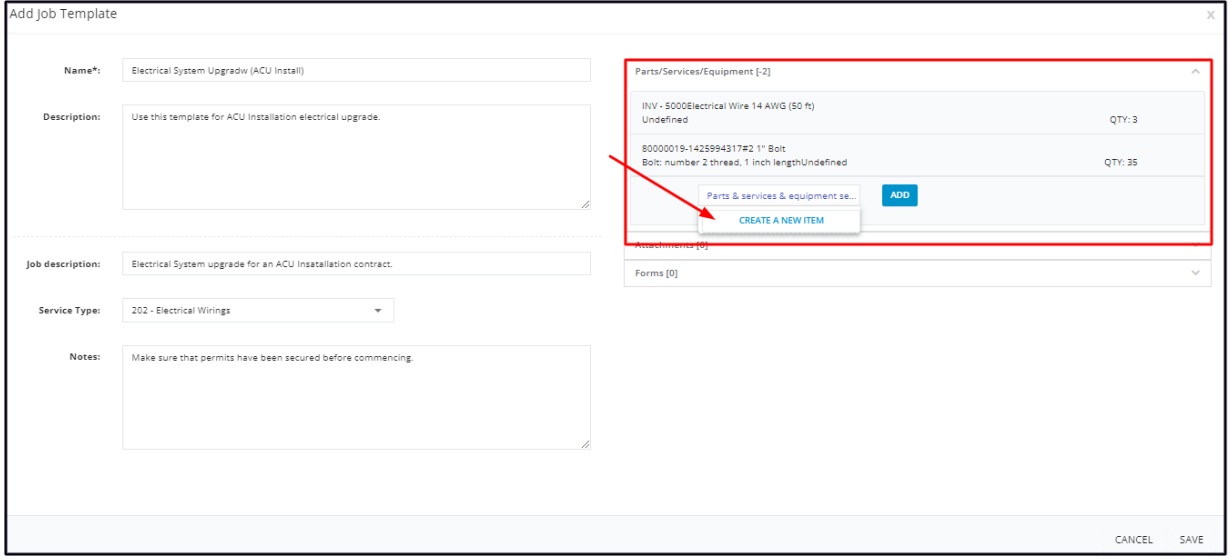
- Select and add other items as may be needed.
- Items appearing in this section will appear as line items when the job is converted into an invoice.



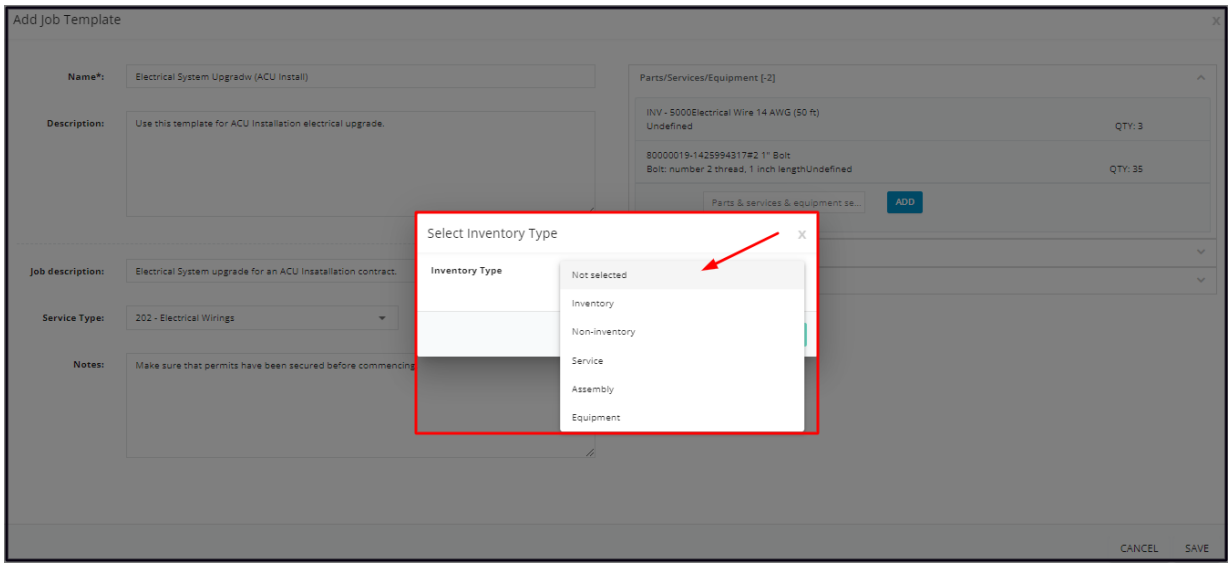
Parts/Services/Equipment (create a new item)

- *If the item is a new one and has not been entered into the system (not on the list), create a profile for it first. To do this, go to the Inventory or Equipment page **OR** create the profile straight from the Job Templates page.*
  - *Below is the instruction on how to add a new inventory/non-inventory/service/assembly/equipment item from the Job Templates page.*

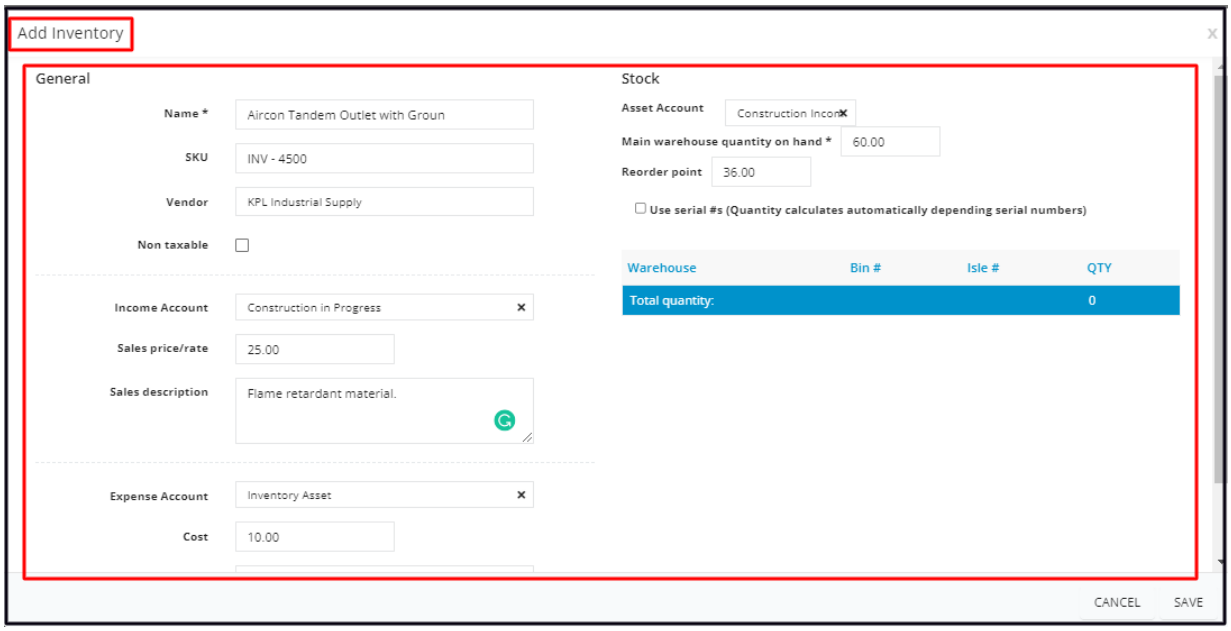
- From the Parts/Services/Equipment field, go to **Create a New Item**.

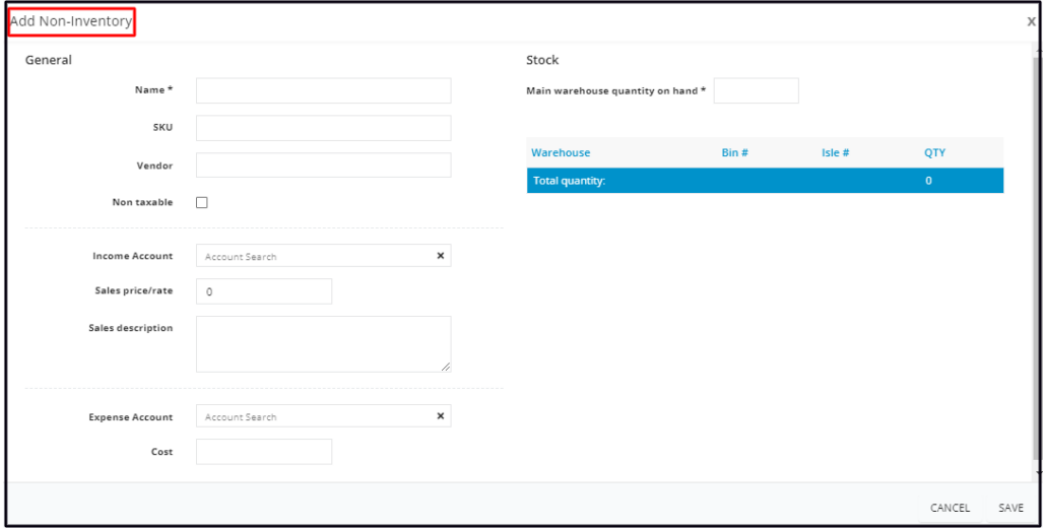


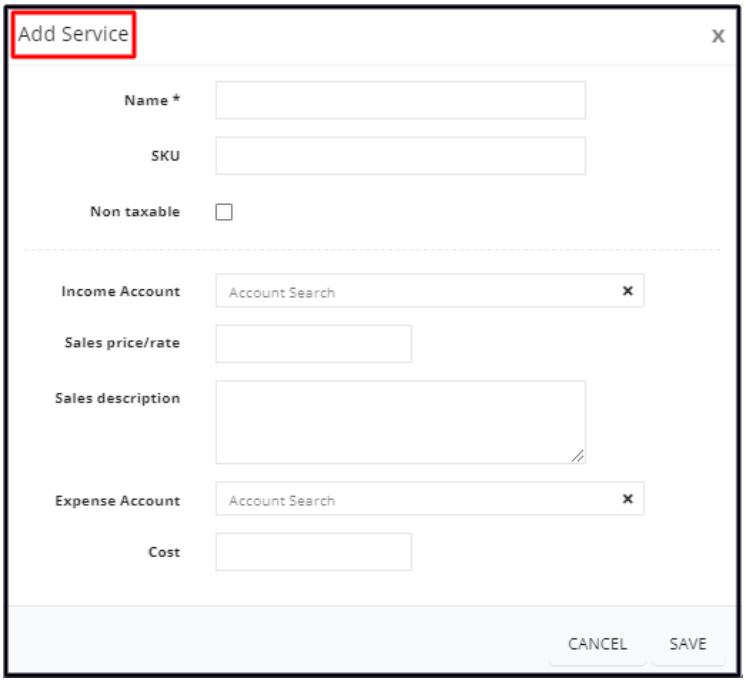
- Select the **Inventory Type**. This could either be Inventory, Non-inventory, Service, Assembly or Equipment.

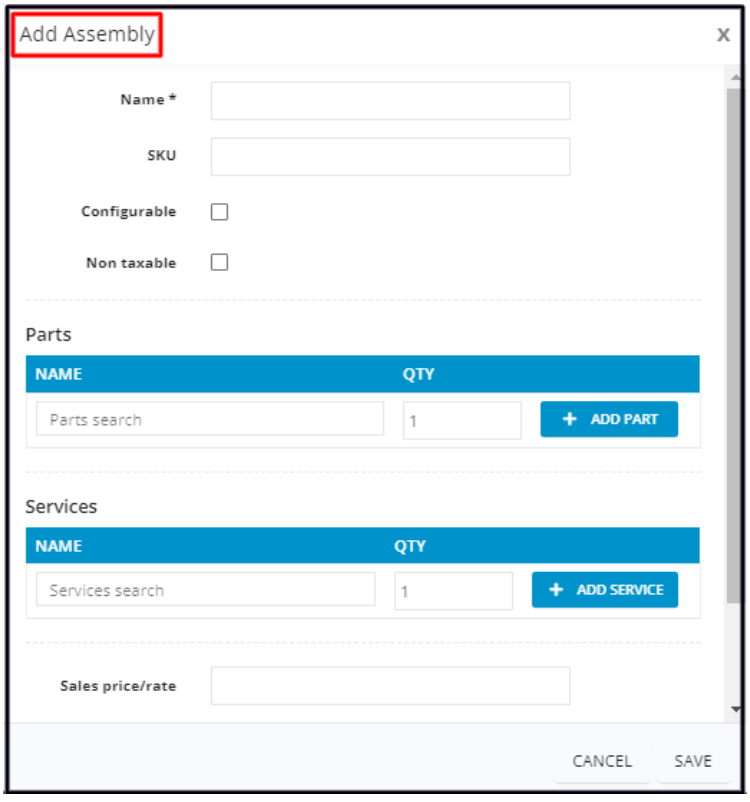


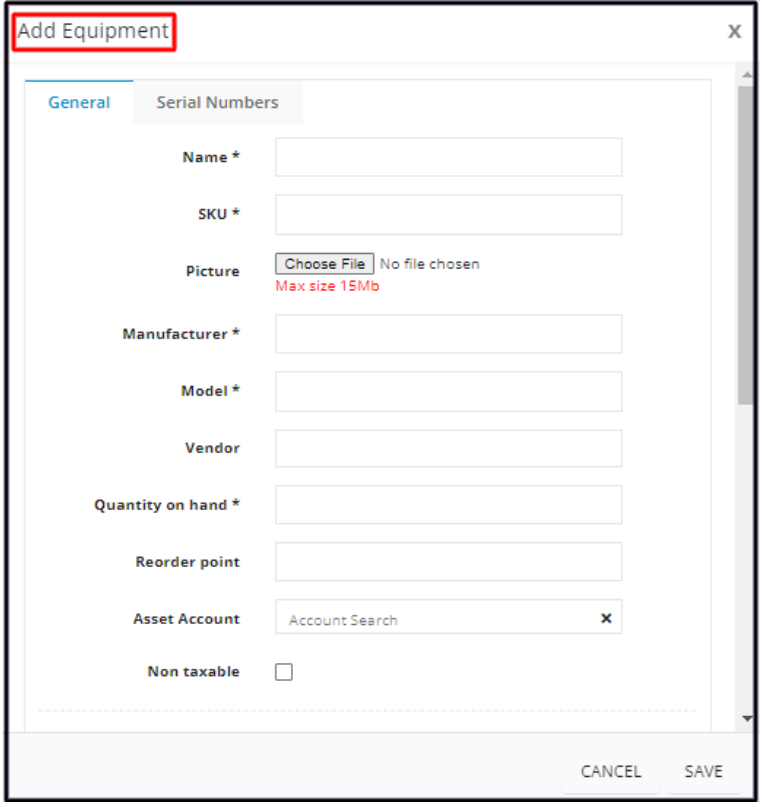
- Depending on the selected Inventory Type, create the item profile on the corresponding window.



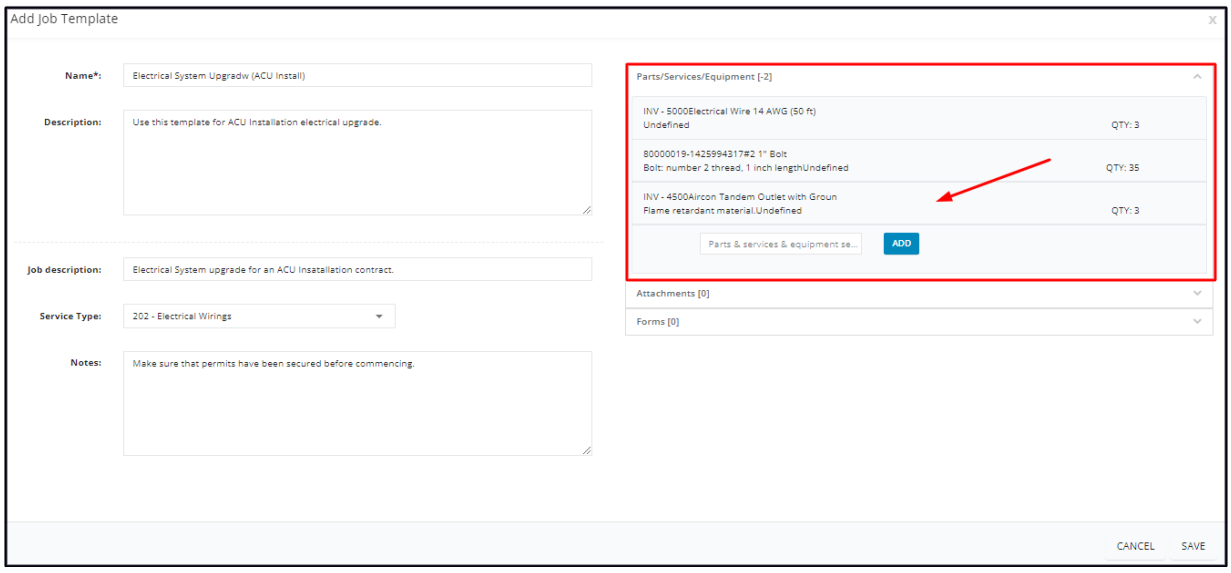

Add Non-Inventory
General
Name *
SKU
Vendor
Non taxable
Income Account
Account Search
Sales price/rate
0
Sales description
Expense Account
Account Search
Cost
Stock
Main warehouse quantity on hand *
Warehouse
Bin #
Isle #
QTY
Total quantity:
0
CANCEL
SAVE

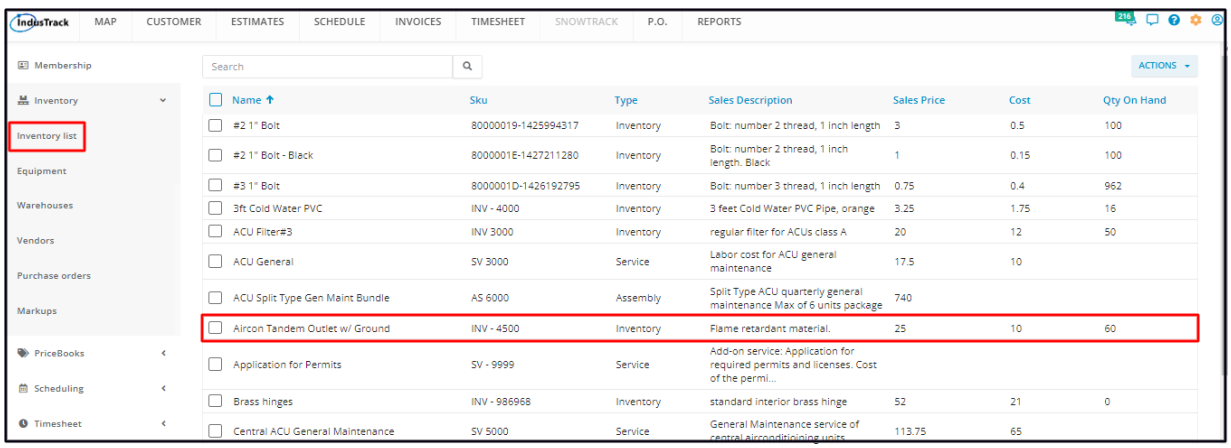

Add Service
Name *
SKU
Non taxable
Income Account
Account Search
Sales price/rate
Sales description
Expense Account
Account Search
Cost
CANCEL
SAVE


Add Assembly
Name *
SKU
Configurable
Non taxable
Parts
NAME
QTY
Parts search
1
ADD PART
Services
NAME
QTY
Services search
1
ADD SERVICE
Sales price/rate
CANCEL
SAVE



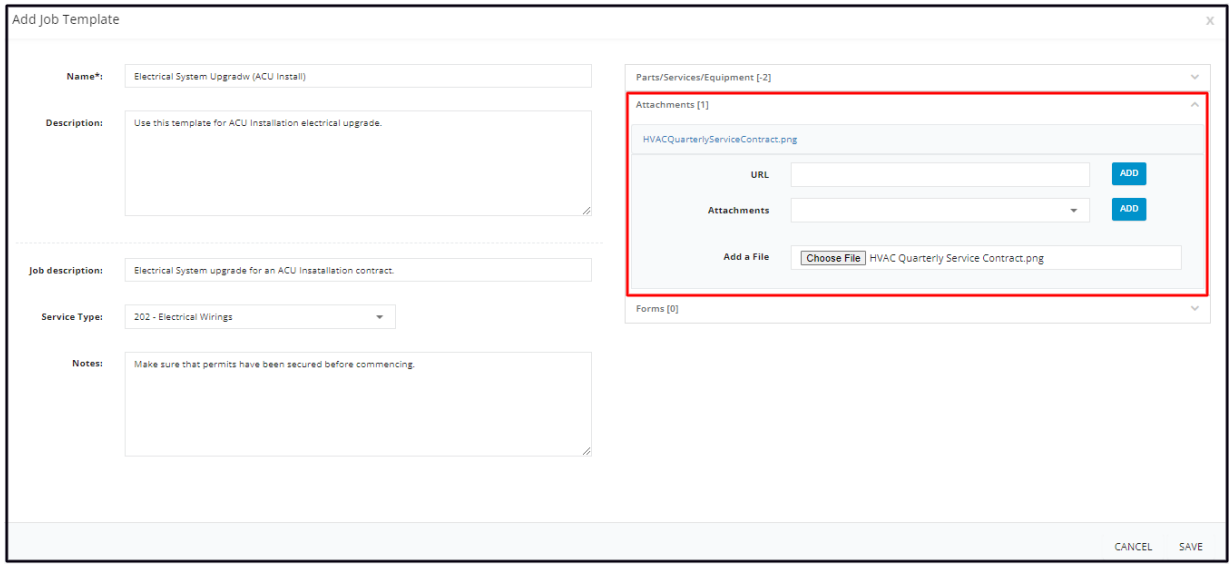
- Once done, **Save** the new item. The screen will return to the **Add Job Template** window.
- Add the new item to the job's list of parts/services/equipment.
- Proceed with the preparation of the Job Template.
    - The new item will be added either to the Inventory or Equipment List.





Attachments

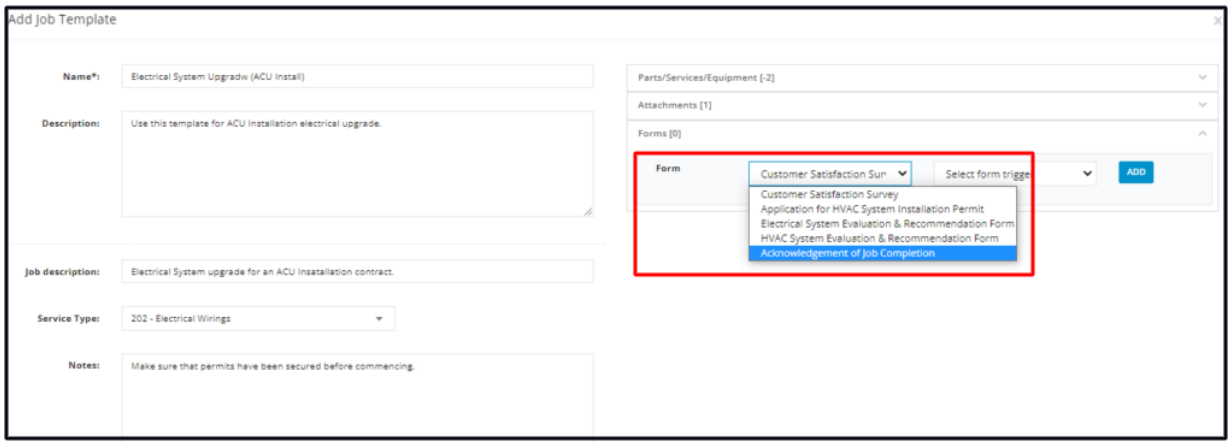
- Click on the field to expand.
- Add pictures, installation manuals or other relevant references. Either add a URL, attach a file or upload one.



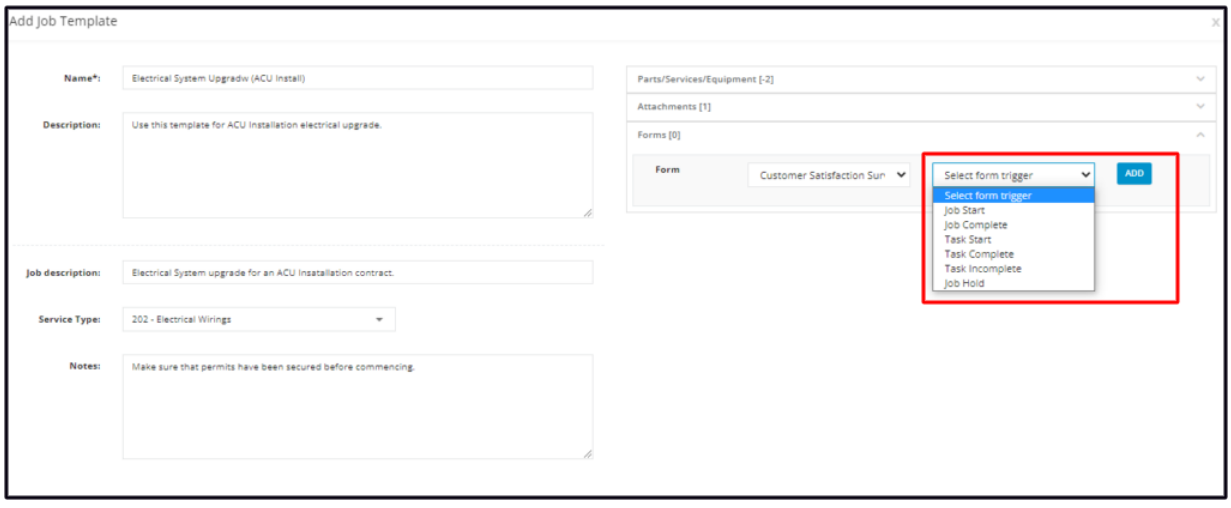
Forms

- *Add a form that has been set up in the system. These forms may be ones that need to be filled out or signed by the field employee or the customer.*
- *If the form needed has not been added to the system, you can either upload the form to the* ***Attachments section*** *or add this to the system from the Forms page.*

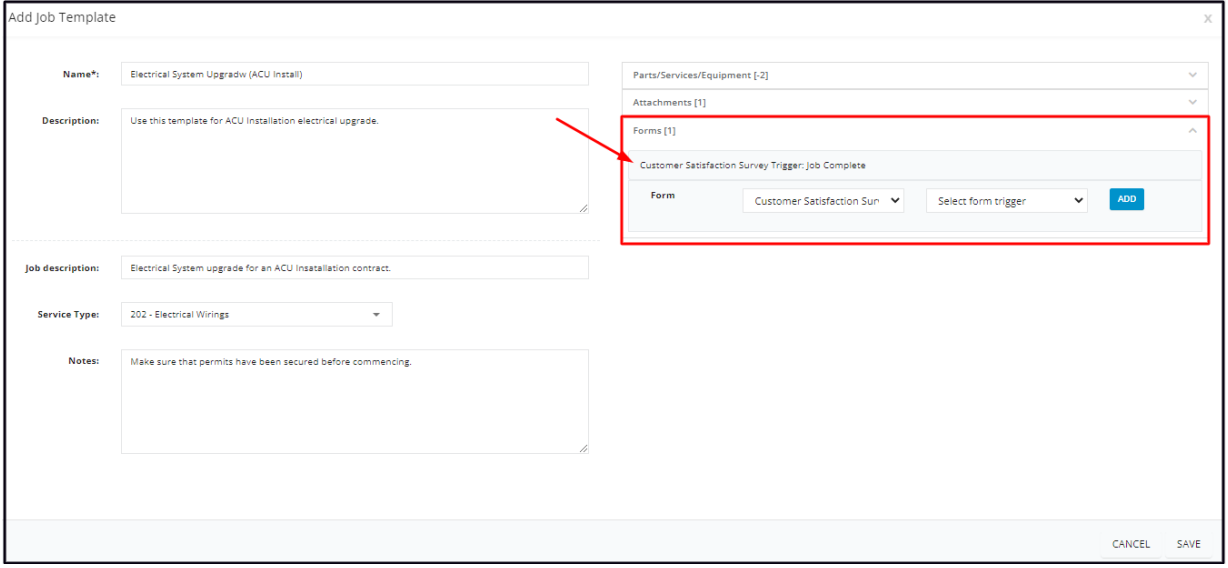
- Click on the field to expand.
- Select the form to be added to the job from the list.



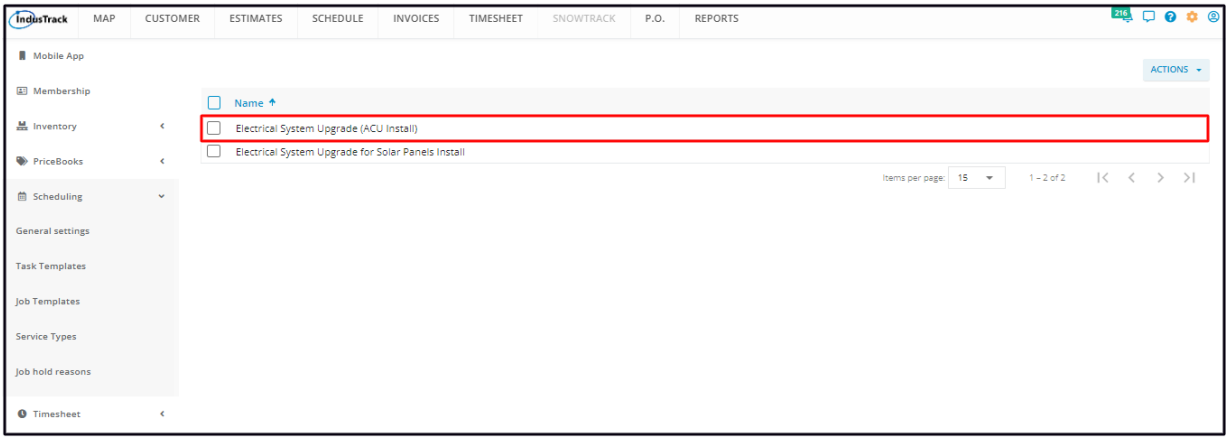
- Select the form trigger from the given options.



- For each selected form and trigger, click the **Add** button.
- The form will be added to the job template.
- Add other forms as needed.

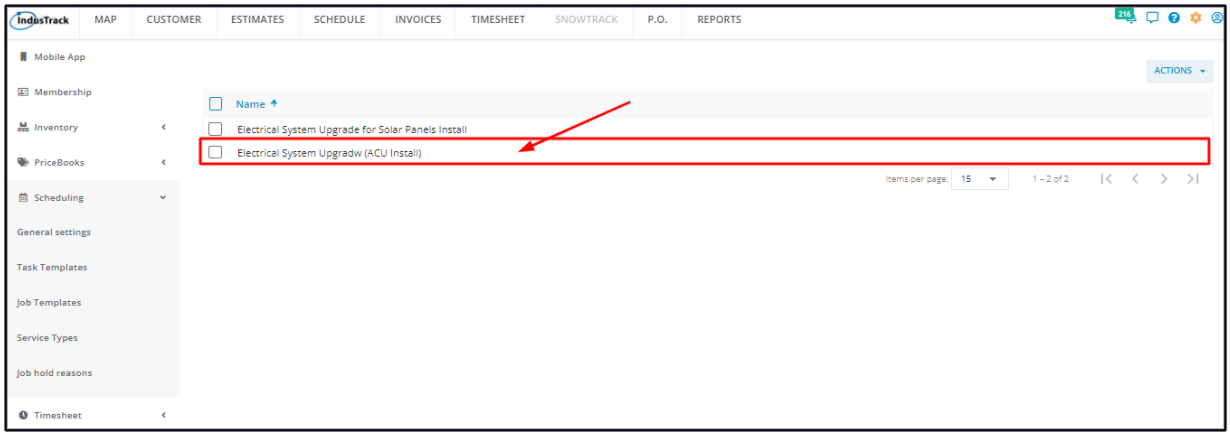


Save the new template. This will be added to the list of job templates.

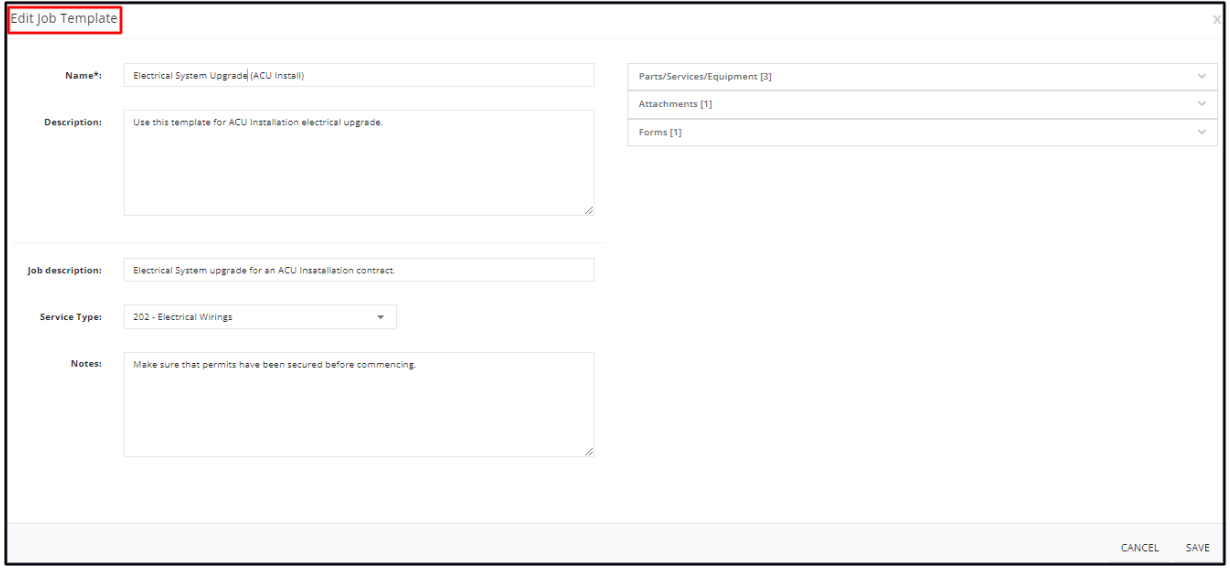


Edit/Update a Job Template

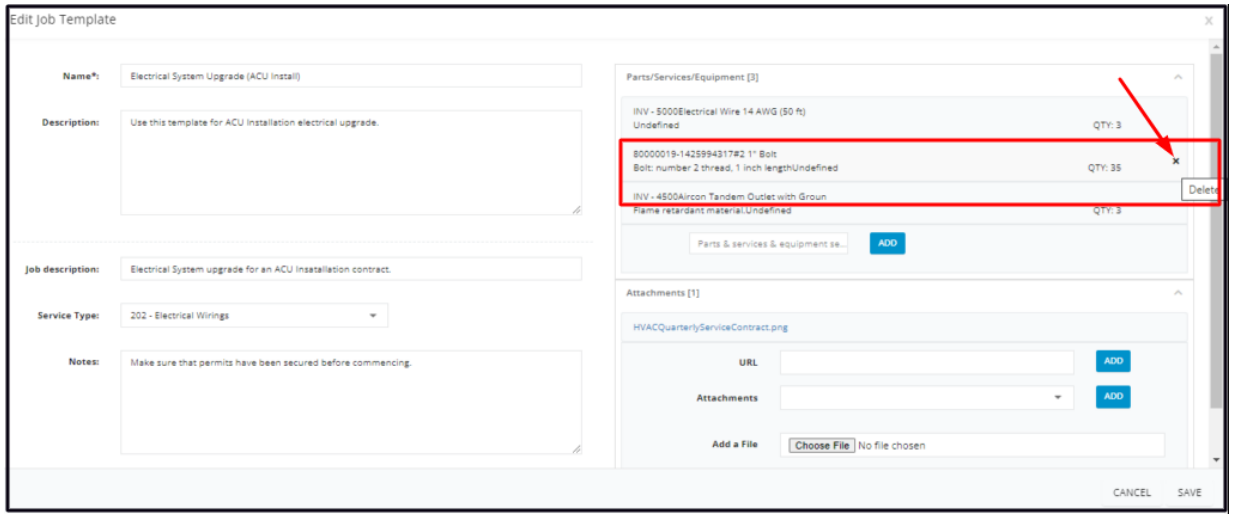
Find the Job Template to be updated from the list. Click on it to open in edit mode.



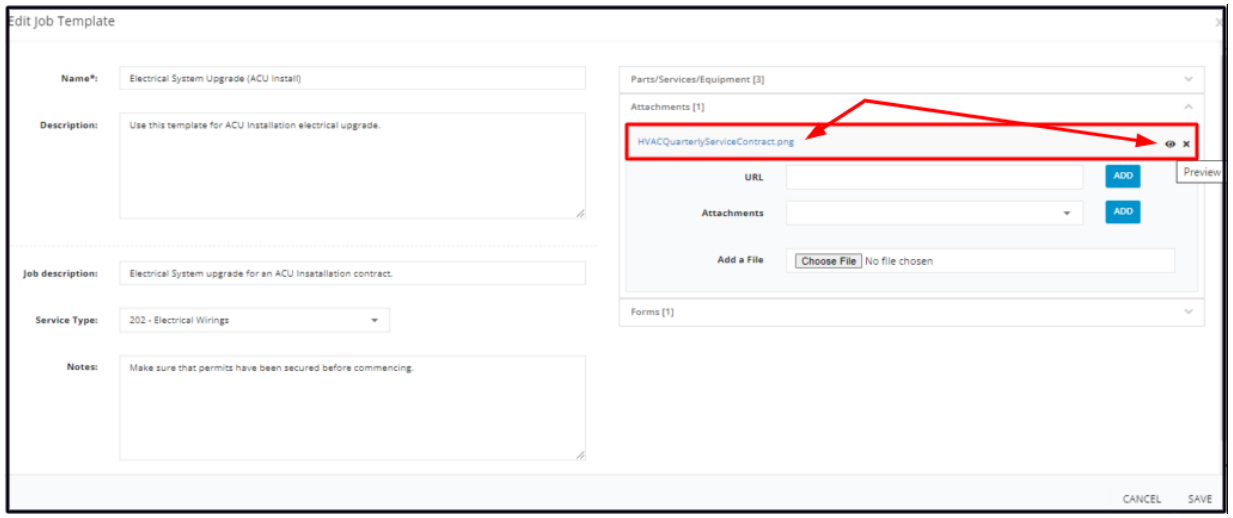
Update the template as may be needed.



- To remove a form, an attachment or a part/service/equipment, click the **delete icon (x)** to the right of the item to be deleted.



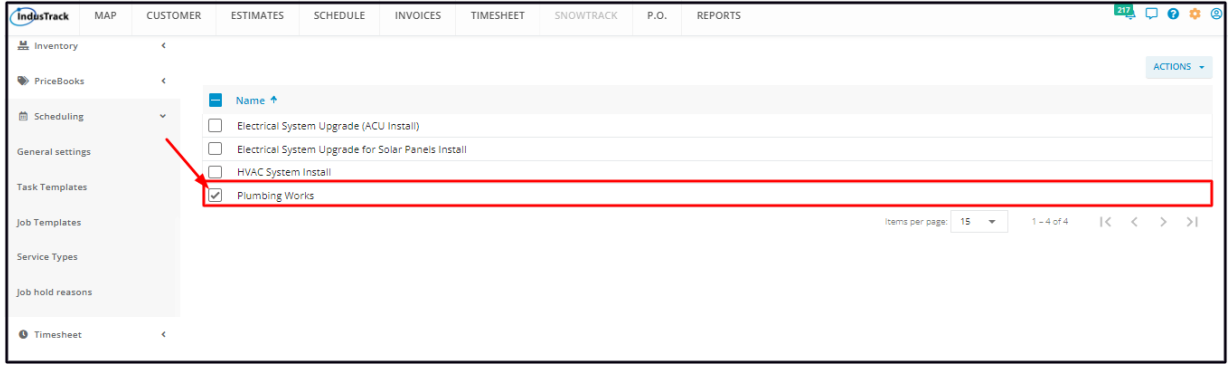
To view an attachment or an uploaded file, click on the eye icon or the file name.



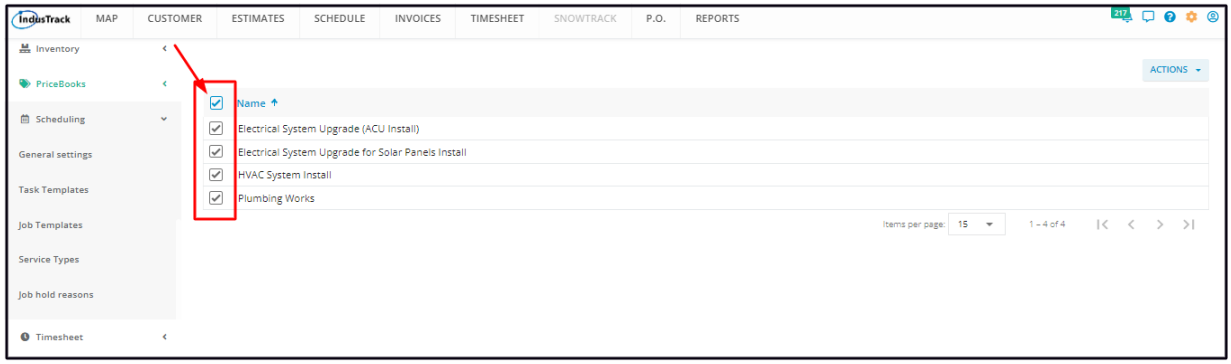
Delete a Job Template

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

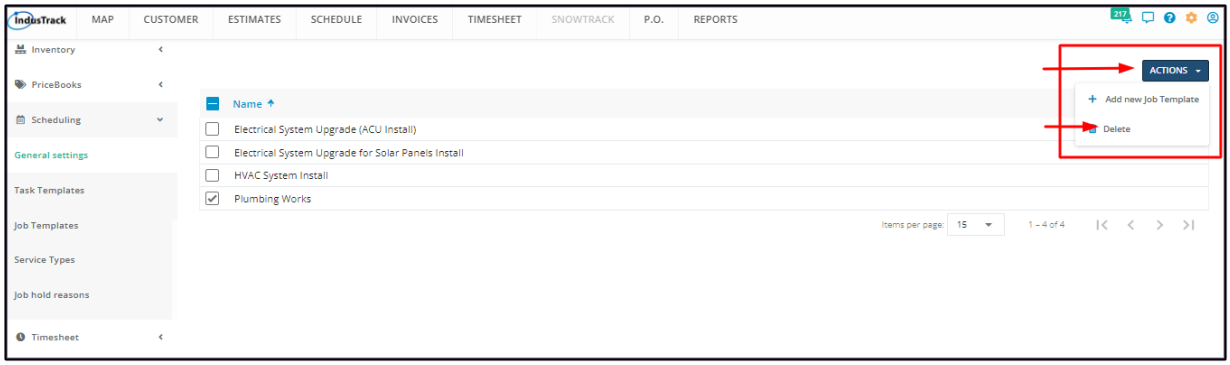
Find the job template to be deleted from the list. Tick the checkbox to its left.



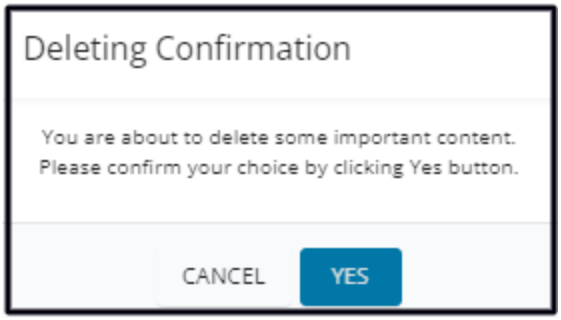
- *To delete multiple job templates from the list, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.*



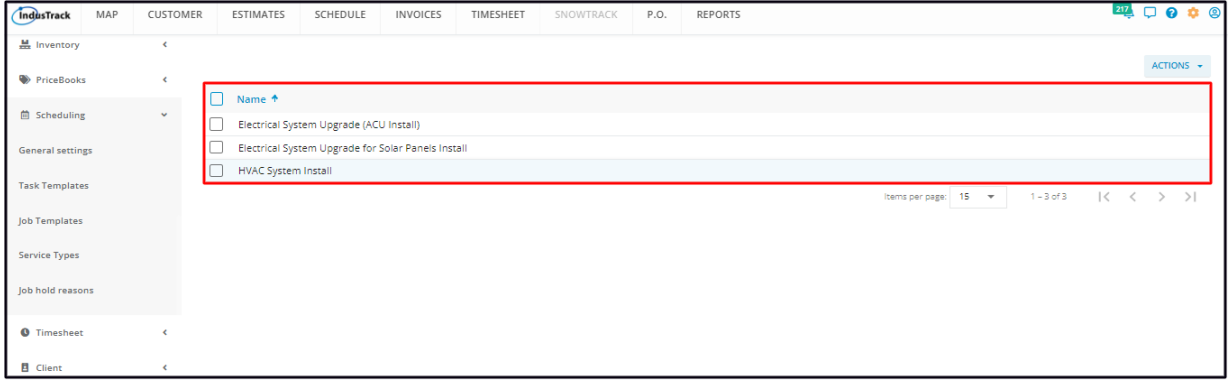
Go to the **Actions** button and select **Delete**.



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



The job template will be removed from the list.


IndusTrack
MAP
CUSTOMER
ESTIMATES
SCHEDULE
INVOICES
TIMESHEET
SNOWTRACK
P.O.
REPORTS
217
Inventory
PriceBooks
Scheduling
General settings
Task Templates
Job Templates
Service Types
Job hold reasons
Timesheet
Client
ACTIONS
Name
Electrical System Upgrade (ACU Install)
Electrical System Upgrade for Solar Panels Install
HVAC System Install
Items per page: 15
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