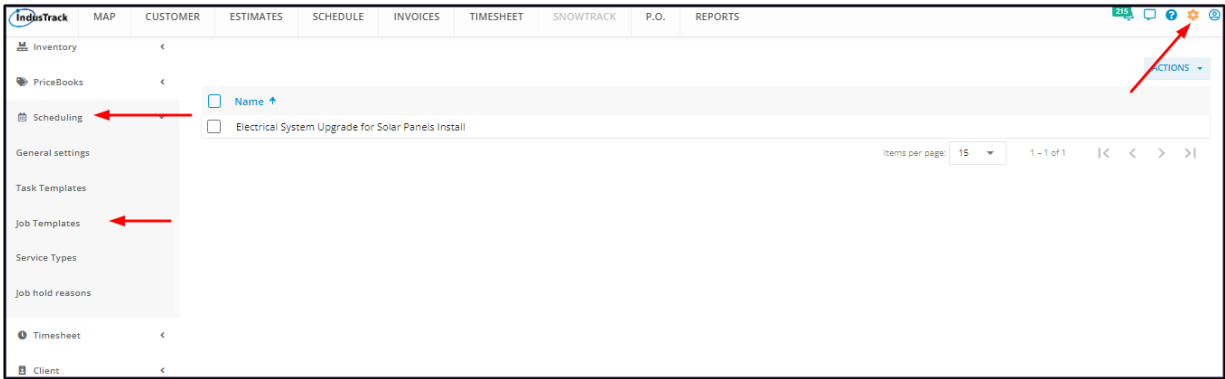


Schedule Settings: Create and Manage Job Templates

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.

Add job Template

Name*:

Description:

Job description:

Service Type:

Not Selected

Notes:

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Name*

Give the Job Template a name/title.

Add Job Template

Name*: Electrical System Upgrade (ACU install)

Description:

Job description:

Service Type: Not Selected

Notes:

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Description

Key in a description of the template.

Add Job Template

Name*: Electrical System Upgrade (ACU install)

Description: Use this template for electrical upgrade jobs of ACU installation contracts.

Job description:

Service Type: Not Selected

Notes:

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Job Description

Key in a short description of the job.

Add Job Template

Name*: Electrical System Upgrade (ACU install)

Description: Use this template for electrical upgrade jobs of ACU installation contracts.

Job description: Electrical System Upgrade for an ACU installation contract

Service Type: Not Selected

Notes:

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Service Type

Select the correct one from the drop-down list.

Add Job Template

Name*: Electrical System Upgrade (ACU install)

Description: Use this template for electrical upgrade jobs of ACU installation contracts.

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Job description: Electrical System Upgrade for an ACU installation contract

Service Type: Not Selected

Notes:

- 001 - General Plumbing Services
- 002 - Water Heater Services
- 003 - Plumbing Installation
- 101 - HVAC General Maintenance
- 102 - HVAC Installation
- 103 - HVAC Evaluation & Recommendation

CANCEL SAVE

Notes

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

Add Job Template

Name*: Electrical System Upgrade (ACU install)

Description: Use this template for electrical upgrade jobs of ACU installation contracts.

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Job description: Electrical System Upgrade for an ACU installation contract

Service Type: 202 - Electrical Wirings

Notes: Make sure that the permit has been secured before commencing.

CANCEL SAVE

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.

Add Job Template

Name*: Electrical System Upgrade (ACU install)

Description: Use this template for ACU installation electrical upgrade.

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

Job description: Electrical System upgrade for an ACU installation contract.

Service Type: 202 - Electrical Wirings

Notes: Make sure that permits have been secured before commencing.

CANCEL SAVE

- 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.

The screenshot shows the 'Add Job Template' form. The 'Name*' field contains 'Electrical System Upgradw (ACU Install)'. The 'Description' field contains 'Use this template for ACU Installation electrical upgrade.' The 'Job description' field contains 'Electrical System upgrade for an ACU Installation contract.' The 'Service Type' dropdown is set to '202 - Electrical Wirings'. The 'Notes' field contains 'Make sure that permits have been secured before commencing.' On the right, the 'Parts/Services/Equipment [2]' section is highlighted with a red box. It shows one item: 'Electrical Wire 14 AWG (50 ft)' with a quantity of '3'. An 'Add' button is next to the quantity. Below this section are 'Attachments [0]' and 'Forms [0]' sections. At the bottom right are 'CANCEL' and 'SAVE' buttons.

- 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.

The screenshot shows the 'Add Job Template' form with the same fields as the previous one. The 'Parts/Services/Equipment [2]' section is highlighted with a red box and now contains two items: 'INV - 5000Electrical Wire 14 AWG (50 ft) Undefined' with a quantity of '3', and '80000019-1425994317#2 1" Bolt Bolt: number 2 thread, 1 inch lengthUndefined' with a quantity of '35'. Below these items is a button labeled 'Parts & services & equipment se...' and an 'Add' button. The 'Attachments [0]' and 'Forms [0]' sections are still empty. The 'CANCEL' and 'SAVE' buttons are at the bottom right.

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**.

Add Job Template

Name*: Electrical System Upgradw (ACU Install)

Description: Use this template for ACU Installation electrical upgrade.

Job description: Electrical System upgrade for an ACU Insatallation contract.

Service Type: 202 - Electrical Wirings

Notes: Make sure that permits have been secured before commencing.

Parts/Services/Equipment [-2]

INV - 5000Electrical Wire 14 AWG (50 ft) Undefined	QTY: 3
80000019-1425994317#2 1" Bolt Bolt: number 2 thread, 1 inch lengthUndefined	QTY: 35

Parts & services & equipment se... **ADD**

CREATE A NEW ITEM

Attachments [0]

Forms [0]

CANCEL SAVE

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

Add Job Template

Name*: Electrical System Upgradw (ACU Install)

Description: Use this template for ACU Installation electrical upgrade.

Job description: Electrical System upgrade for an ACU Insatallation contract.

Service Type: 202 - Electrical Wirings

Notes: Make sure that permits have been secured before commencing.

Parts/Services/Equipment [-2]

INV - 5000Electrical Wire 14 AWG (50 ft) Undefined	QTY: 3
80000019-1425994317#2 1" Bolt Bolt: number 2 thread, 1 inch lengthUndefined	QTY: 35

Parts & services & equipment se... **ADD**

Select Inventory Type

Inventory Type

- Not selected
- Inventory
- Non-inventory
- Service
- Assembly
- Equipment

CANCEL SAVE

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

Add Inventory

General

Name *: Aircon Tandem Outlet with Groun

SKU: INV - 4500

Vendor: KPL Industrial Supply

Non taxable: ☐

Income Account: Construction in Progress

Sales price/rate: 25.00

Sales description: Flame retardant material.

Expense Account: Inventory Asset

Cost: 10.00

Stock

Asset Account: Construction Incon

Main warehouse quantity on hand *: 60.00

Reorder point: 36.00

☐ Use serial #s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Total quantity:			0

CANCEL SAVE

Add Non-Inventory

General

Name *

SKU

Vendor

Non taxable

Income Account

Sales price/rate

Sales description

Expense Account

Cost

Stock

Main warehouse quantity on hand *

Warehouse	Bin #	Isle #	QTY
Total quantity:			0

CANCEL

SAVE

Add Service

Name *

SKU

Non taxable

Income Account

Sales price/rate

Sales description

Expense Account

Cost

CANCEL

SAVE

Add Assembly

Name *

SKU

Configurable

Non taxable

Parts

NAME	QTY
Parts search	1

Services

NAME	QTY
Services search	1

Sales price/rate

CANCEL

SAVE

Add Equipment

X

General

Serial Numbers

Name *

SKU *

Picture

Choose File

No file chosen

Max size 15Mb

Manufacturer *

Model *

Vendor

Quantity on hand *

Reorder point

Asset Account

X

Non taxable

☐

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.

Add Job Template

X

Name*:

Description:

Use this template for ACU Installation electrical upgrade.

Job description:

Service Type:

202 - Electrical Wirings
▼

Notes:

Make sure that permits have been secured before commencing.

Parts/Services/Equipment [-2]

^

INV - 5000Electrical Wire 14 AWG (50 ft) Undefined	QTY: 3
80000019-1425994317#2 1" Bolt Bolt: number 2 thread, 1 inch lengthUndefined	QTY: 35
INV - 4500Aircon Tandem Outlet with Groun Flame retardant material.Undefined	QTY: 3

Parts & services & equipment se...

ADD

Attachments [0] ▼

Forms [0] ▼

CANCEL

SAVE

IndusTrack								
MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS								
Membership	<div style="display: flex; align-items: center;"> <input type="text" value="Search"/> <div style="border: 1px solid #ccc; padding: 0 5px; font-size: 0.8em;">Q</div> </div>							
Inventory	ACTIONS ▼							
Inventory list	<input type="checkbox"/>	Name ↑	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
	<input type="checkbox"/>	#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
	<input type="checkbox"/>	#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	100
	<input type="checkbox"/>	#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	962
	<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	16
	<input type="checkbox"/>	ACU Filter#3	INV 3000	Inventory	regular filter for ACUs class A	20	12	50
	<input type="checkbox"/>	ACU General	SV 3000	Service	Labor cost for ACU general maintenance	17.5	10	
	<input type="checkbox"/>	ACU Split Type Gen Maint Bundle	AS 6000	Assembly	Split Type ACU quarterly general maintenance Max of 6 units package	740		
	<input type="checkbox"/>	Aircon Tandem Outlet w/ Ground	INV - 4500	Inventory	Flame retardant material.	25	10	60
	<input type="checkbox"/>	Application for Permits	SV - 9999	Service	Add-on service: Application for required permits and licenses. Cost of the perm...			
	<input type="checkbox"/>	Brass hinges	INV - 986968	Inventory	standard interior brass hinge	52	21	0
	<input type="checkbox"/>	Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central Aircorndisbiling units	113.75	65	

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.

The screenshot shows the 'Add Job Template' form. The 'Attachments' section is highlighted with a red box. It contains a list of attachments with the following fields: 'URL', 'Attachments', and 'Add a File'. The 'Add a File' button is labeled 'Choose File' and the file name 'HVAC Quarterly Service Contract.png' is displayed. The 'Attachments' section also has an 'Add' button.

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.

The screenshot shows the 'Add Job Template' form. The 'Forms' section is highlighted with a red box. It contains a list of forms with the following fields: 'Form', 'Select form trigger', and 'Add'. The 'Form' dropdown menu is open, showing a list of forms: 'Customer Satisfaction Survey', 'Application for HVAC System Installation Permit', 'Electrical System Evaluation & Recommendation Form', 'HVAC System Evaluation & Recommendation Form', and 'Acknowledgement of Job Completion'.

- Select the form trigger from the given options.

The screenshot shows the 'Add Job Template' form. The 'Forms' section is highlighted with a red box. It contains a list of forms with the following fields: 'Form', 'Select form trigger', and 'Add'. The 'Form' dropdown menu is open, showing a list of forms: 'Customer Satisfaction Survey', 'Application for HVAC System Installation Permit', 'Electrical System Evaluation & Recommendation Form', 'HVAC System Evaluation & Recommendation Form', and 'Acknowledgement of Job Completion'. The 'Select form trigger' dropdown menu is also open, showing a list of triggers: 'Job Start', 'Job Complete', 'Task Start', 'Task Complete', 'Task Incomplete', and 'Job Hold'.

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

Add Job Template

Name#: Electrical System Upgradw (ACU Install)

Description: Use this template for ACU Installation electrical upgrade.

Parts/Services/Equipment [-2]

Attachments [1]

Forms [1]

Customer Satisfaction Survey Trigger: Job Complete

Form Customer Satisfaction Sun Select form trigger **ADD**

Job description: Electrical System upgrade for an ACU Installation contract.

Service Type: 202 - Electrical Wirings

Notes: Make sure that permits have been secured before commencing.

CANCEL SAVE

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

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Scheduling v

General settings

Task Templates

Job Templates

Service Types

Job hold reasons

Timesheet <

ACTIONS v

Name ↑

☐ Electrical System Upgrade (ACU Install)

☐ Electrical System Upgrade for Solar Panels Install

Items per page: 15 1 - 2 of 2 |< < > >|

Edit/Update a Job Template

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

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Name ↑

☐ Electrical System Upgrade for Solar Panels Install

☐ Electrical System Upgradw (ACU Install)

Items per page: 15 1 - 2 of 2 |< < > >|

Update the template as may be needed.

Edit Job Template

Name*: Electrical System Upgrade (ACU Install)

Description: Use this template for ACU Installation electrical upgrade.

Job description: Electrical System upgrade for an ACU Installation contract.

Service Type: 202 - Electrical Wirings

Notes: Make sure that permits have been secured before commencing.

Parts/Services/Equipment [3]

Attachments [1]

Forms [1]

CANCEL SAVE

- 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.

Edit Job Template

Name*: Electrical System Upgrade (ACU Install)

Description: Use this template for ACU Installation electrical upgrade.

Job description: Electrical System upgrade for an ACU Installation contract.

Service Type: 202 - Electrical Wirings

Notes: Make sure that permits have been secured before commencing.

Parts/Services/Equipment [3]

INV - 5000Electrical Wire 14 AWG (50 ft)	Qty: 3	
80000019-1428994317#2 1" Bolt	Qty: 35	X
Bolt: number 2 thread, 1 inch length		
INV - 4800Aircon Tandem Outlet with Groun	Qty: 3	
Flame retardant material		

Attachments [1]

HVACQuarterlyServiceContract.png

URL: ADD

Attachments: ADD

Add a File: No file chosen

CANCEL SAVE

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

Edit Job Template

Name*: Electrical System Upgrade (ACU Install)

Description: Use this template for ACU Installation electrical upgrade.

Job description: Electrical System upgrade for an ACU Installation contract.

Service Type: 202 - Electrical Wirings

Notes: Make sure that permits have been secured before commencing.

Parts/Services/Equipment [3]

Attachments [1]

HVACQuarterlyServiceContract.png **X**

URL: ADD

Attachments: ADD

Add a File: No file chosen

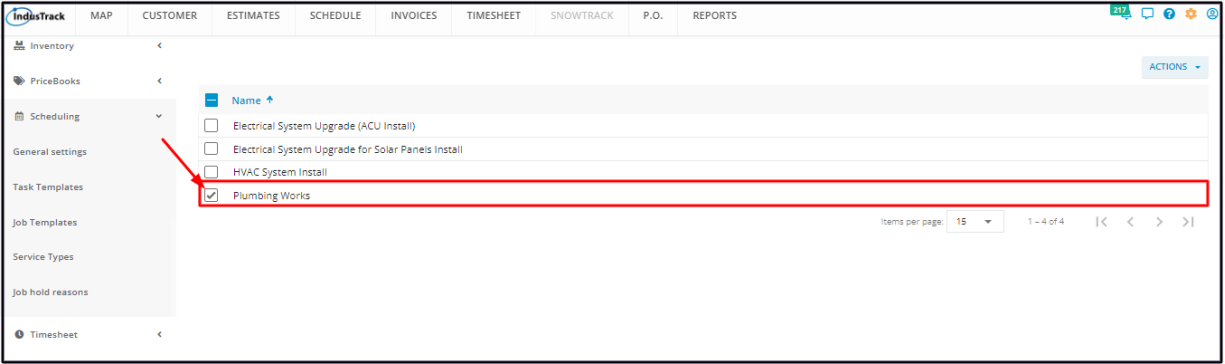
Forms [1]

CANCEL SAVE

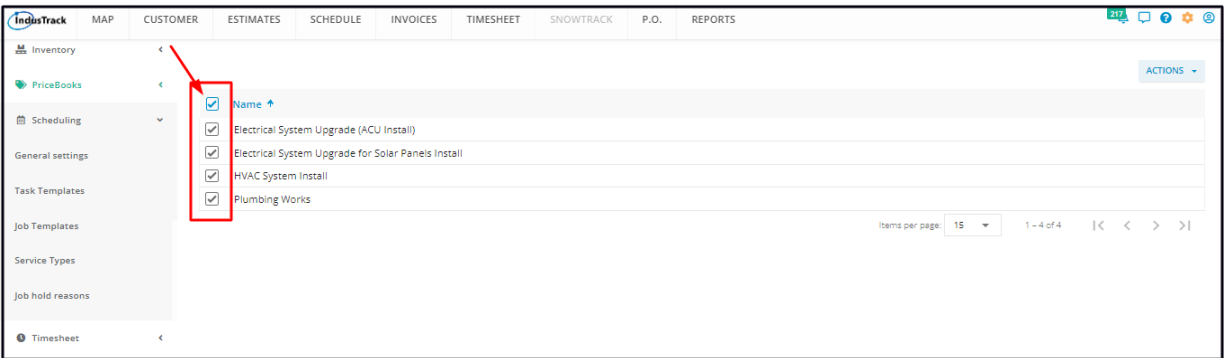
Delete a Job Template

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.

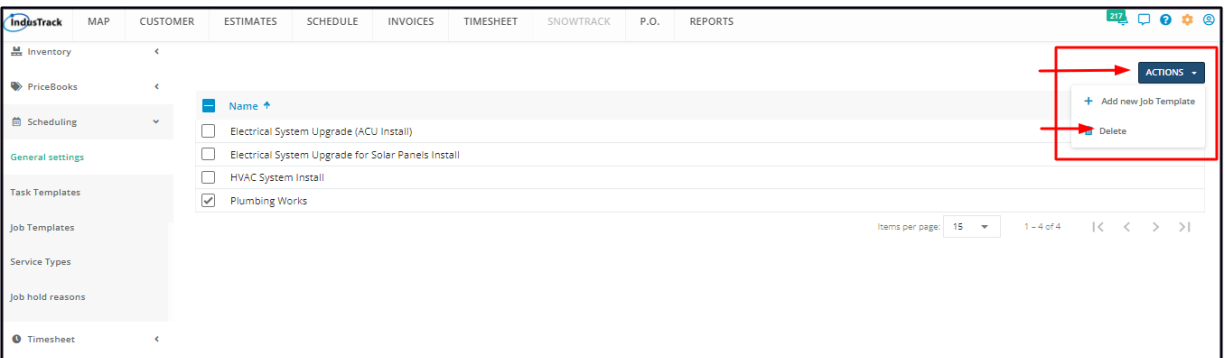
Find the job template to be deleted from the list. Tick the checkbox to its left.



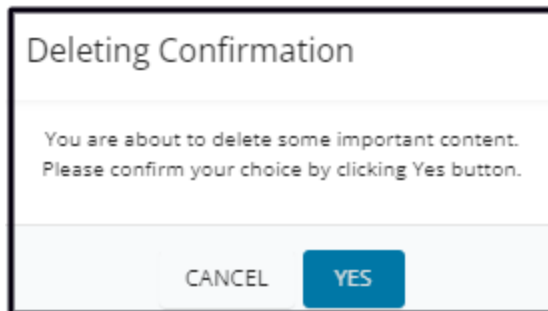
- To delete multiple job templates from the list, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.



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.

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Client

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Name

☐

Electrical System Upgrade (ACU Install)

☐

Electrical System Upgrade for Solar Panels Install

☐

HVAC System Install

ACTIONS

Items per page: 15

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