

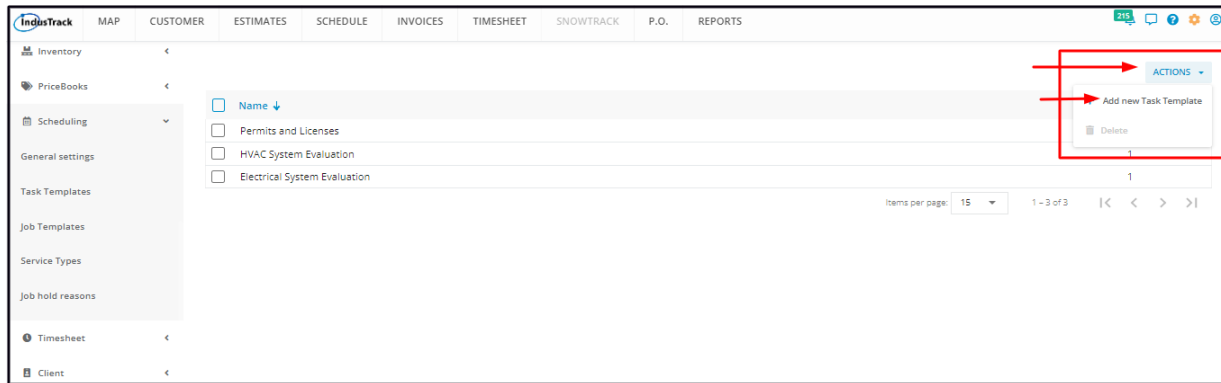
# Schedule Settings: Create and Manage Task Templates

**Task templates** are useful in situations wherein you have standard tasks or services that are performed in many jobs. Load a saved task template for ease of documentation and report generation. You also eliminate missed tasks due to set-up errors plus you do not have to enter the same information repeatedly when you create similar jobs.

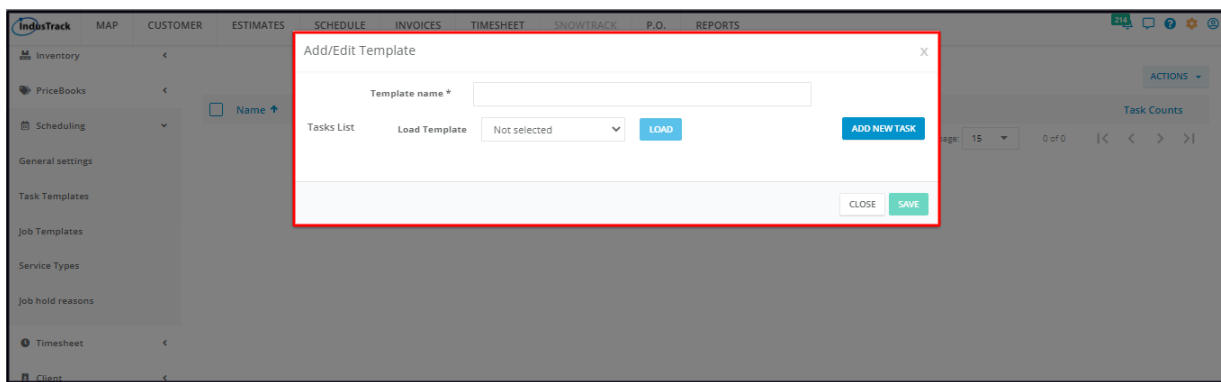
To set up and manage Task Templates, go to **Settings > Scheduling > Task Templates**.

## Create a Task Template

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

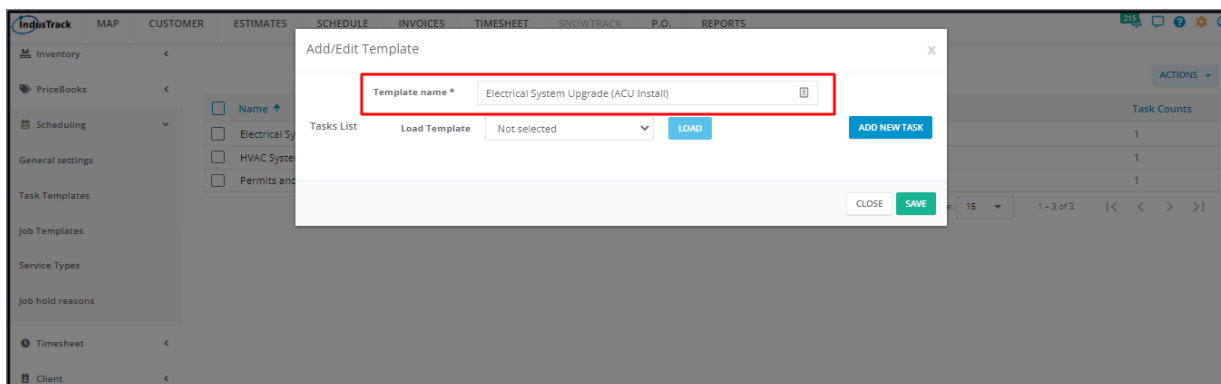


Fill in the Task Template details on the **Add/Edit Template** window. Fields with \* are required.



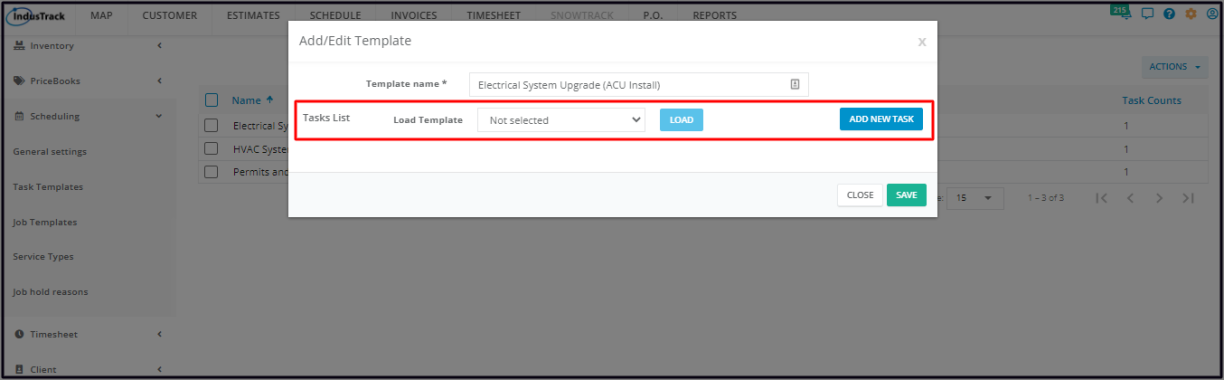
## Template Name\*

- Key in the assigned name of the Task Template.



## Tasks Lists

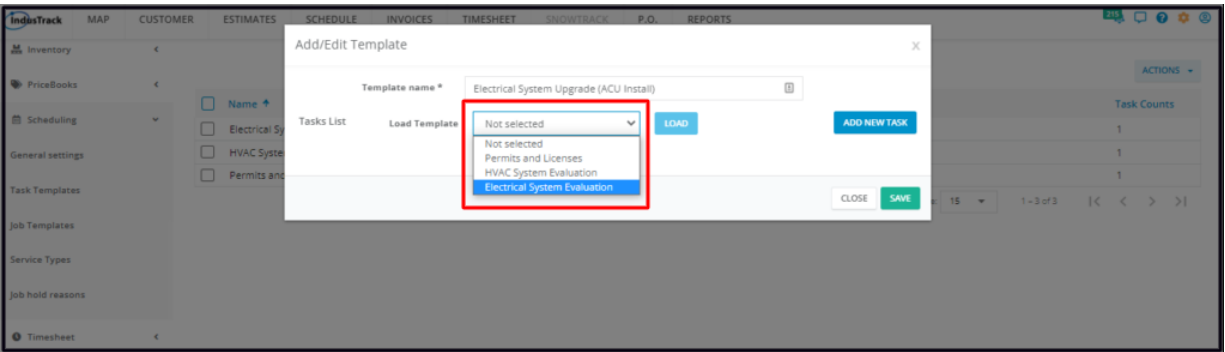
Add the associated task or tasks. There are 2 ways to add tasks: (1) load one of the existing task templates and (2) create a new task.



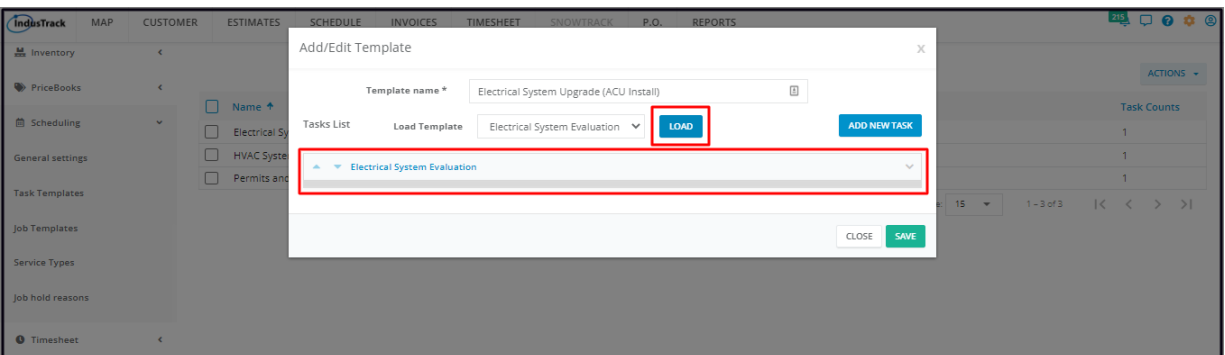
**Load one of the existing Task Templates.**

*Loading an existing Task Template will create a template inside a template.*

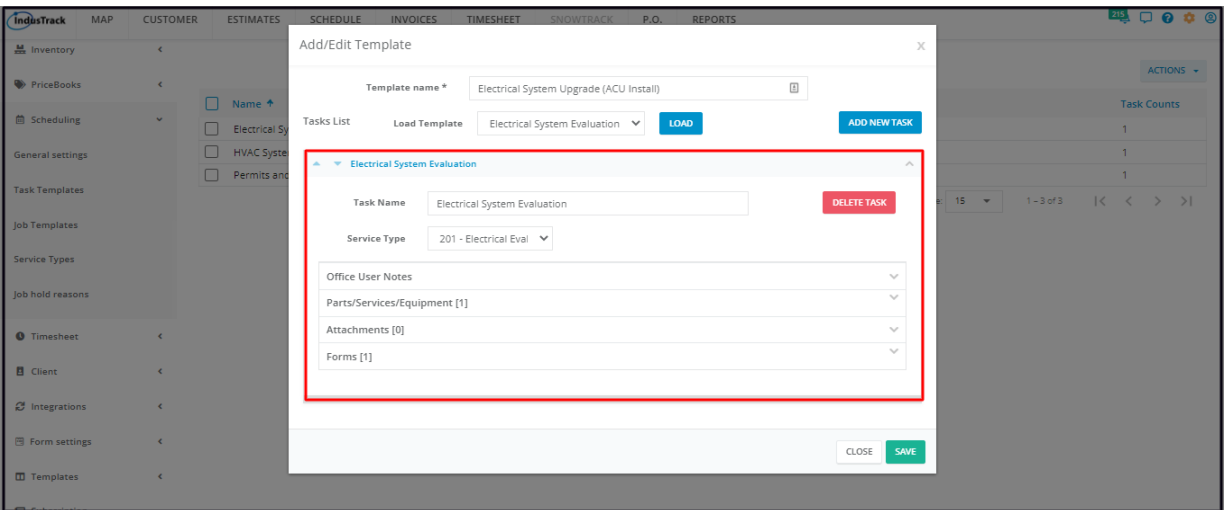
Click on the Load Template field. Select the Task Template to be used in the new template.



Click the **Load** button. This will add the associated task(s).



Update or Edit the loaded task details as needed. Changes made will be reflected on the new task template only and will not affect the original one. Edit a loaded Task the same way you would a new task (see below).



*To add more than one Task Template, save the loaded template first. Open the Task Template in edit mode and add another one. Continue to add task templates as may be needed. Save each loaded template as you go along.*

## Create a new task.

Go to the **Add New Task** button. This will expand the new task fields. Fill out the details.

The screenshot shows the 'Add/Edit Template' window in the IndustTrack application. The 'Template name' field contains 'Electrical System Upgrade (ACU Install)'. The 'Tasks List' shows 'Electrical System Evaluation' selected. A red box highlights the 'ADD NEW TASK' button. Another red box highlights the 'new task' section, which includes fields for 'Task Name', 'Service Type', 'Office User Notes', 'Parts/Services/Equipment [0]', 'Attachments [0]', and 'Forms [0]'. A 'DELETE TASK' button is also visible.

- **Task Name**

- Assign a name for the task. Once this is done, the new task name will be updated.

The screenshot shows the 'Add/Edit Template' window in the IndustTrack application. The 'Task Name' field is highlighted with a red box and contains the text 'Electrical rewire for ACU compatibility'. A red arrow points to the 'Task Name' field.

- **Service Type**

- Select the correct one from the drop-down list.

The screenshot shows the 'Add/Edit Template' window in the IndustTrack application. The 'Service Type' dropdown menu is open, showing a list of service types. A red box highlights the dropdown menu, and a red arrow points to the '202 - Electrical Wiring' option.

- **Office User Notes**

- Click on the field to expand. Key in a note, a reminder or special instructions on the Notes field.

IndustTrack 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 Integrations Form settings Templates Subscription

Task Templates: ☐ Name ☐ Electrical System ☐ HVAC System ☐ Permits and

Task Name: Electrical System Upgrade (ACU Install)

Tasks List: Load Template: Electrical System Evaluation LOAD ADD NEW TASK

Electrical System Evaluation

Electrical rewire for ACU compatibility DELETE TASK

Service Type

Office User Notes

Notes: Electrical system evaluation should be approved before the task is to be started.

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

CLOSE SAVE

- **Parts/Services/Equipment (select)**

- 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.

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

Task Templates: ☐ Name ☐ Electrical System ☐ HVAC System ☐ Permits and

Task Name: Electrical System Upgrade (ACU Install)

Tasks List: Load Template: Electrical System Evaluation LOAD ADD NEW TASK

Electrical System Evaluation

Electrical rewire for ACU compatibility DELETE TASK

Service Type

Office User Notes

Parts/Services/Equipment [0]

Attachments [0]

Forms [0]

SV - 9005 - Electrical System Evaluation (A)  
Service  
Free Service for new HVAC or  
Electrical Installation contract

INV - 5000 - Electrical Wire  
14 AWG (50 ft)  
Inventory  
QTY 20  
\$350

CREATE A NEW ITEM

CLOSE SAVE

- **Parts/Services/Equipment (add)**

- 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 task.

IndustTrack 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 Integrations Form settings Templates Subscription

Task Templates: ☐ Name ☐ Electrical System ☐ HVAC System ☐ Permits and

Task Name: Electrical System Upgrade (ACU Install)

Tasks List: Load Template: Electrical System Evaluation LOAD ADD NEW TASK

Electrical System Evaluation

Electrical rewire for ACU compatibility DELETE TASK

Service Type

Office User Notes

Parts/Services/Equipment [0]

Electrical Wire 14 AWG (50 ft) Quantity 1 ADD

Attachments [0]

Forms [0]

CLOSE SAVE

**Add/Edit Template**

Load Template: electrical system evaluation

**Electrical System Evaluation**

**Electrical rewire for ACU compatibility**

Task Name: Electrical rewire for ACU compatibility

Service Type: [Dropdown]

Office User Notes

**Parts/Services/Equipment [1]**

INV - 5000 Electrical Wire 14 AWG (50 ft)	Undefined	QTY: 1
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Parts & services & equipment se... **ADD**

Attachments [0]

Forms [0]

**CLOSE SAVE**

- **Parts/Services/Equipment (add other items)**
  - 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.

**Add/Edit Template**

Load Template: electrical system evaluation

**Electrical System Evaluation**

**Electrical rewire for ACU compatibility**

Task Name: Electrical rewire for ACU compatibility

Service Type: [Dropdown]

Office User Notes

**Parts/Services/Equipment [2]**

INV - 5000 Electrical Wire 14 AWG (50 ft)	Undefined	QTY: 1
INV - 5001 Circuit Breaker	Undefined	QTY: 1

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

Attachments [0]

**CLOSE SAVE**

- **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 Task Template page.*
  - Below is the instruction on how to add a new inventory/non-inventory/service/assembly/equipment item from the Task Template page.
- From the Parts/Services/Equipment field, go to **Create a New Item**.

**Add/Edit Template**

Load Template: electrical system evaluation

**Electrical System Evaluation**

**Electrical rewire for ACU compatibility**

Task Name: Electrical rewire for ACU compatibility

Service Type: [Dropdown]

Office User Notes

**Parts/Services/Equipment [2]**

INV - 5000 Electrical Wire 14 AWG (50 ft)	Undefined	QTY: 1
INV - 5001 Circuit Breaker	Undefined	QTY: 1

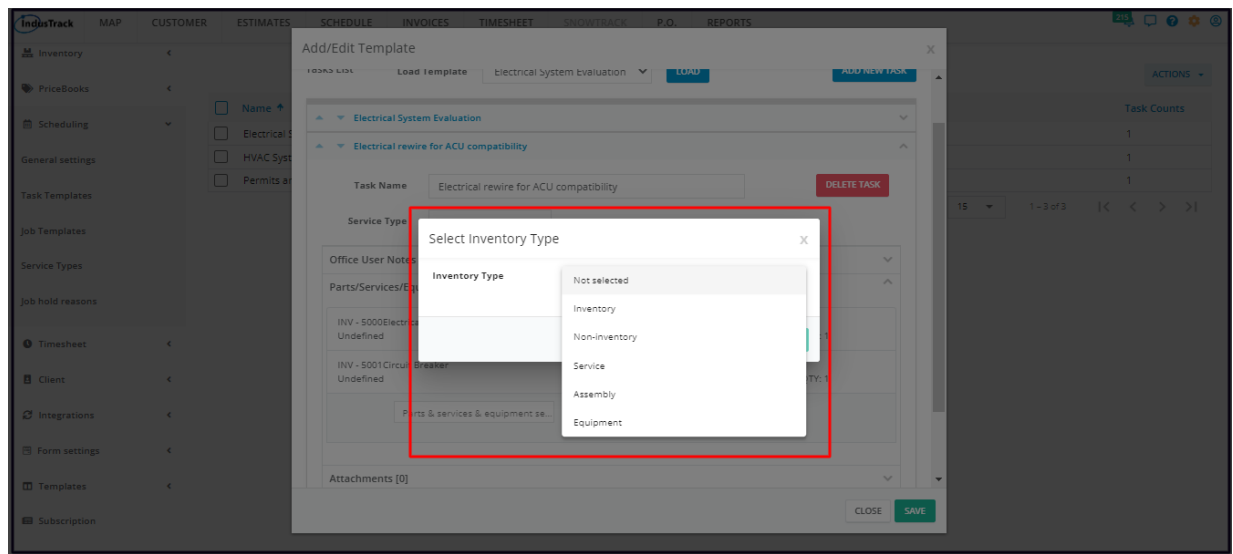
Parts & services & equipment se... **ADD**

**CREATE A NEW ITEM**

Attachments [0]

**CLOSE SAVE**

- 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 Inventory**

General		Stock									
Name *	<input type="text"/>	Asset Account	<input type="text" value="Account Search"/>								
SKU	<input type="text"/>	Main warehouse quantity on hand *	<input type="text" value="1"/>								
Vendor	<input type="text"/>	Reorder point	<input type="text"/>								
Non taxable	<input type="checkbox"/>	<input type="checkbox"/> Use serial #s (Quantity calculates automatically depending serial numbers)									
Income Account	<input type="text" value="Account Search"/>	<table border="1"> <thead> <tr> <th>Warehouse</th> <th>Bin #</th> <th>Isle #</th> <th>QTY</th> </tr> </thead> <tbody> <tr> <td colspan="3">Total quantity:</td> <td>0</td> </tr> </tbody> </table>		Warehouse	Bin #	Isle #	QTY	Total quantity:			0
Warehouse	Bin #	Isle #	QTY								
Total quantity:			0								
Sales price/rate	<input type="text" value="0"/>										
Sales description	<input type="text"/>										
Expense Account	<input type="text" value="Account Search"/>										
Cost	<input type="text"/>										

CANCEL SAVE

**Add Non-Inventory**

General		Stock									
Name *	<input type="text"/>	Main warehouse quantity on hand *	<input type="text"/>								
SKU	<input type="text"/>										
Vendor	<input type="text"/>										
Non taxable	<input type="checkbox"/>										
Income Account	<input type="text" value="Account Search"/>	<table border="1"> <thead> <tr> <th>Warehouse</th> <th>Bin #</th> <th>Isle #</th> <th>QTY</th> </tr> </thead> <tbody> <tr> <td colspan="3">Total quantity:</td> <td>0</td> </tr> </tbody> </table>		Warehouse	Bin #	Isle #	QTY	Total quantity:			0
Warehouse	Bin #	Isle #	QTY								
Total quantity:			0								
Sales price/rate	<input type="text" value="0"/>										
Sales description	<input type="text"/>										
Expense Account	<input type="text" value="Account Search"/>										
Cost	<input type="text"/>										

CANCEL SAVE

### Add Service

X

Name \*

SKU

Non taxable

☐

Income Account

Account Search

X

Sales price/rate

Sales description

Expense Account

Account Search

X

Cost

CANCEL

SAVE

### Add Assembly

X

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/Edit Template window.
- Add the new item to the task's list of parts/services/equipment.
- Proceed with the preparation of the Task 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.



The screenshot shows the 'Add/Edit Template' window in IndusTrack. The 'Forms' section is highlighted with a red box. It contains a table with one row:

Form	Customer Satisfaction Sur	Select form trigger	ADD
	Customer Satisfaction Sur	Select form trigger	ADD

- **Form (select form)**
  - Click on the field to expand.
  - Select the form to be added to the task from the list.

The screenshot shows the 'Add/Edit Template' window in IndusTrack. The 'Forms' section is highlighted with a red box. A dropdown menu is open, showing the following options:

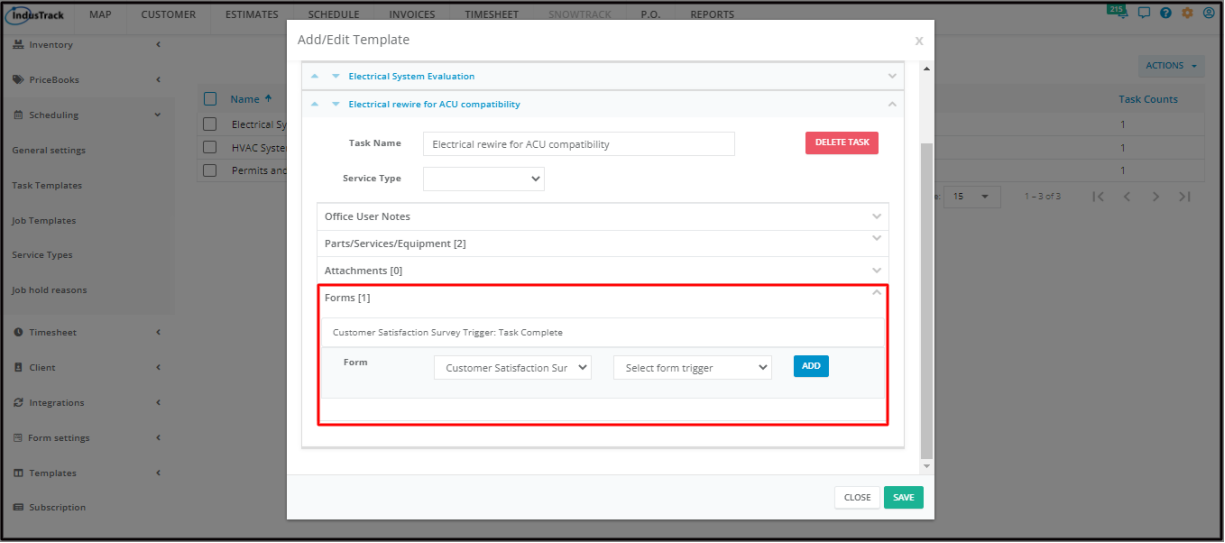
- Customer Satisfaction Survey
- Application for HVAC System Installation Permit
- Electrical System Evaluation & Recommendation Form
- HVAC System Evaluation & Recommendation Form
- Acknowledgement of Job Completion

- **Form (select form trigger)**
  - Select the form trigger from the given options.

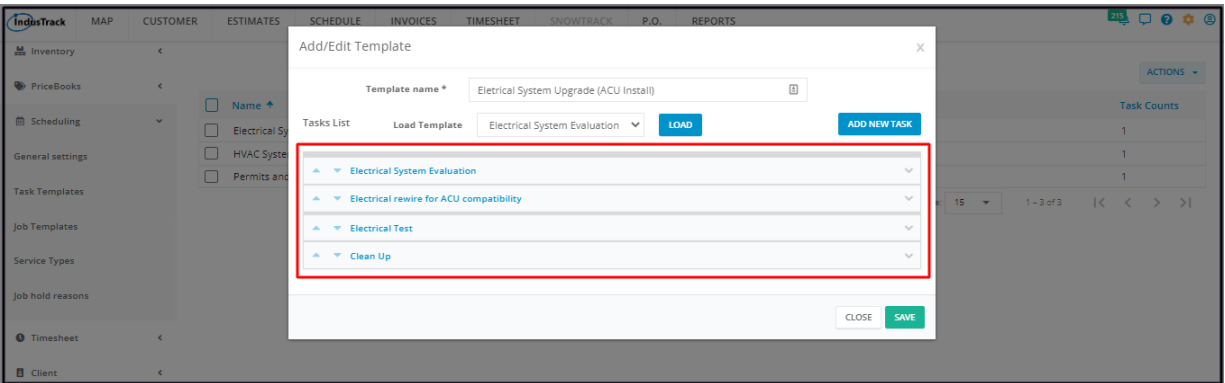
The screenshot shows the 'Add/Edit Template' window in IndusTrack. The 'Forms' section is highlighted with a red box. A dropdown menu is open, showing the following options:

- Select form trigger
- Select form trigger
- Job Start
- Job Complete
- Task Complete
- Task Incomplete
- Job Hold

- **Forms (add other forms)**
  - For each selected form and trigger, click the **Add** button.
  - The form will be added to the task.
  - Add other forms as needed.



Add more tasks as needed.

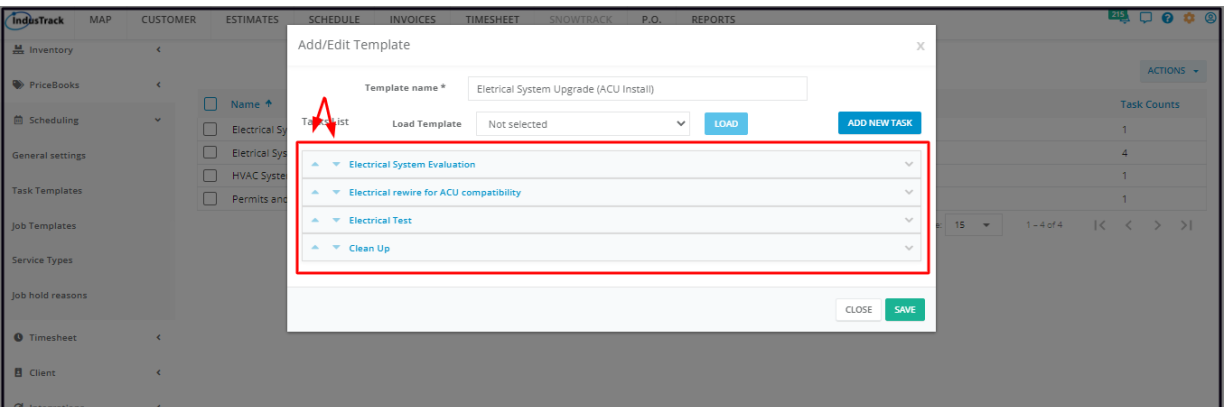


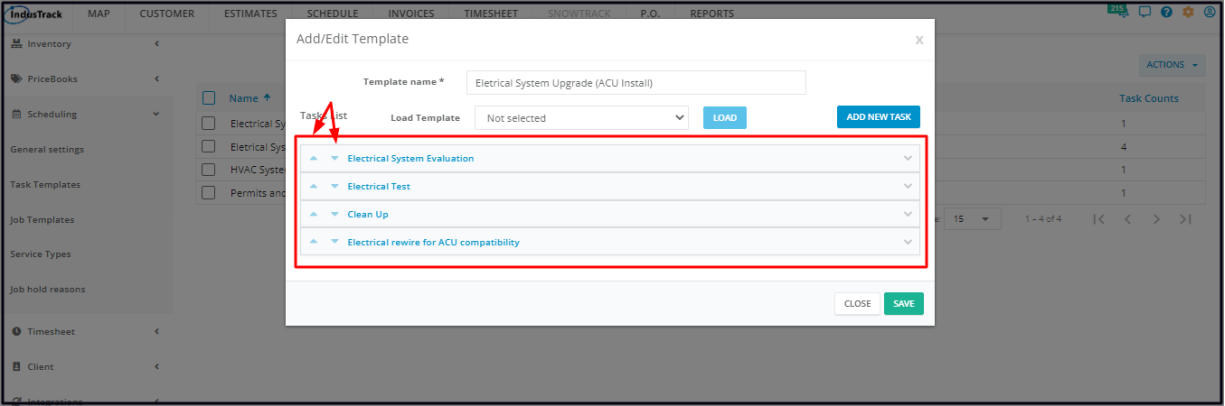
Save the new template. This will be added to the list of task templates.



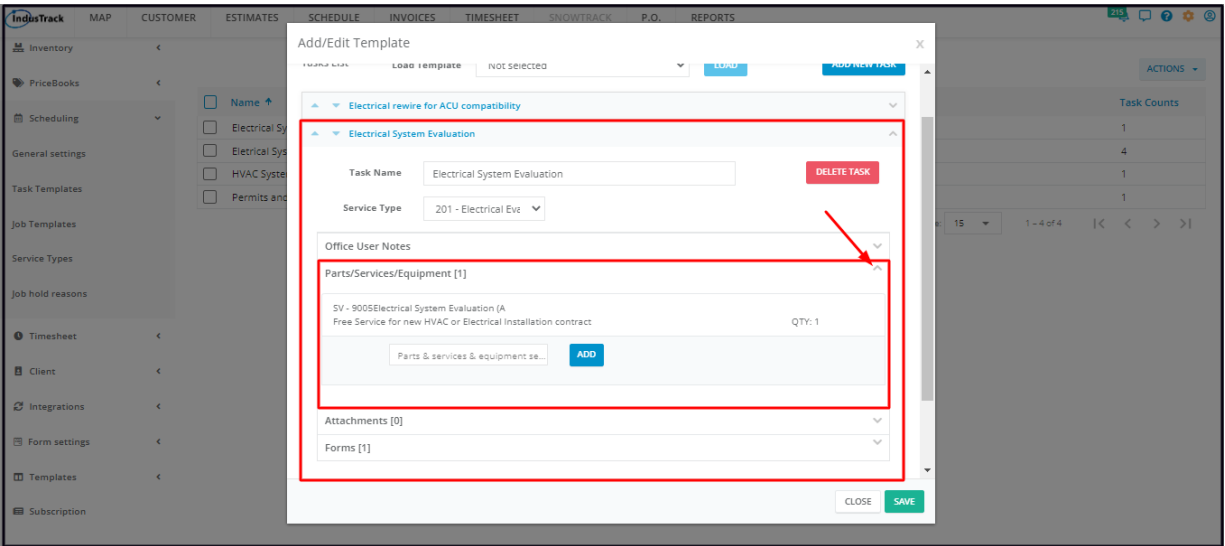
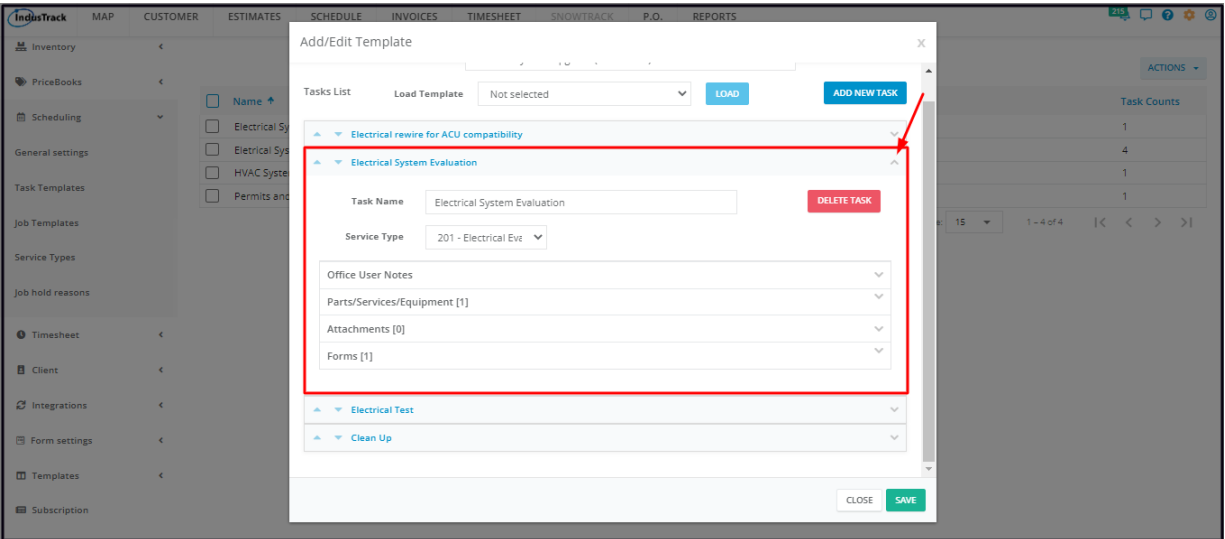
## Working on the Tasks

- Use arrows to the left of the tasks to switch the order(s).

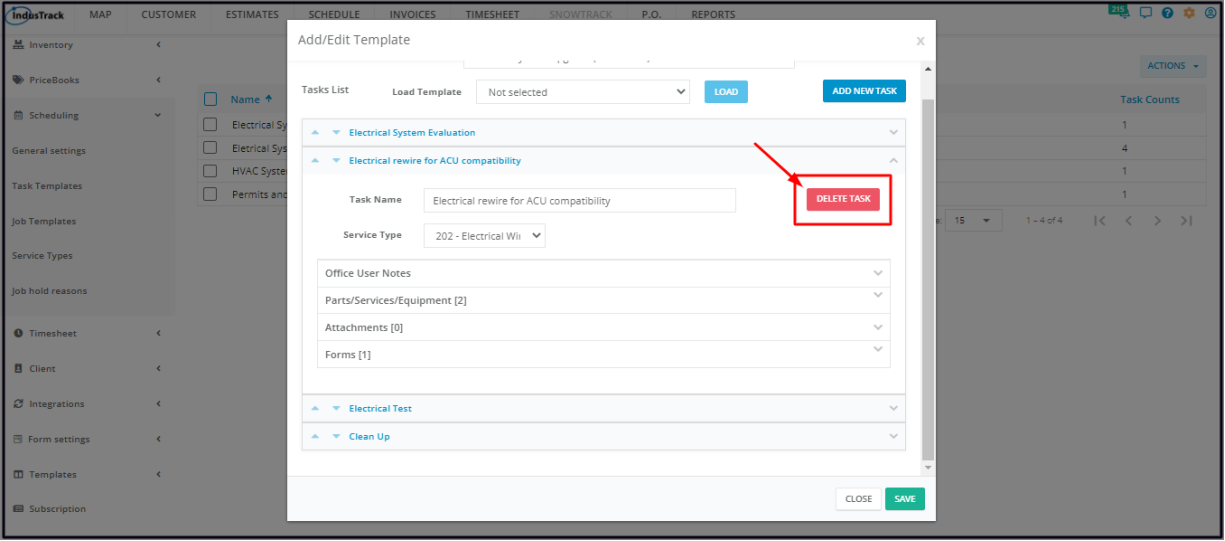




- Use the arrows to the right of the task details to expand/compress the task details.

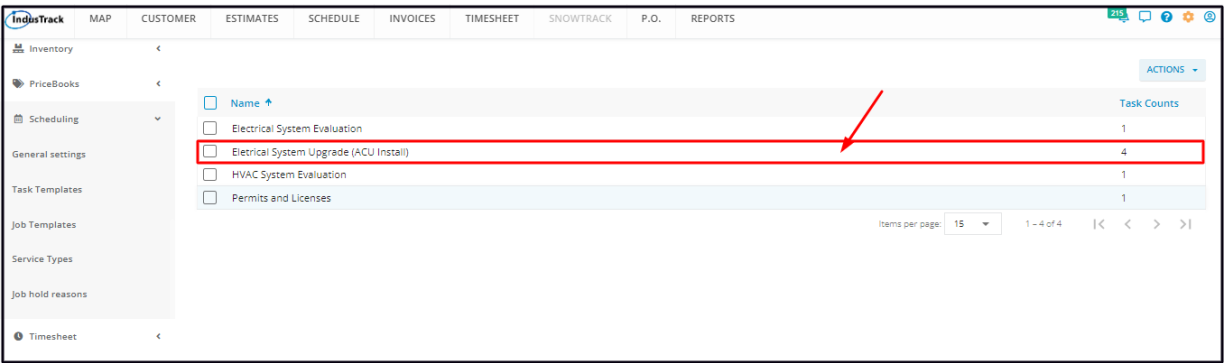


- Click the **Delete Task** to remove a Task.



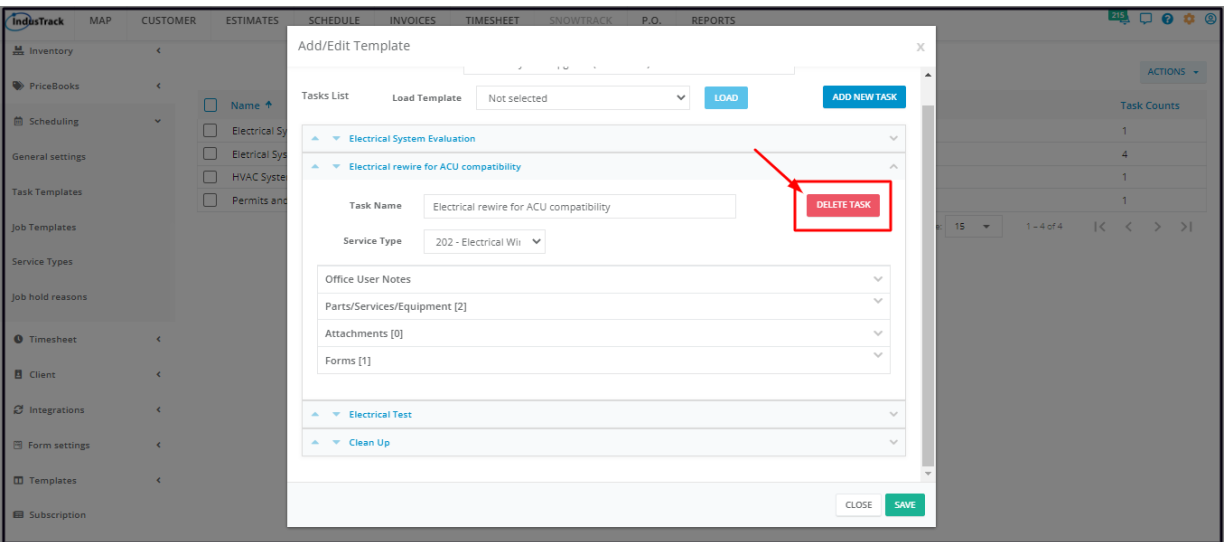
## Edit a Task Template

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

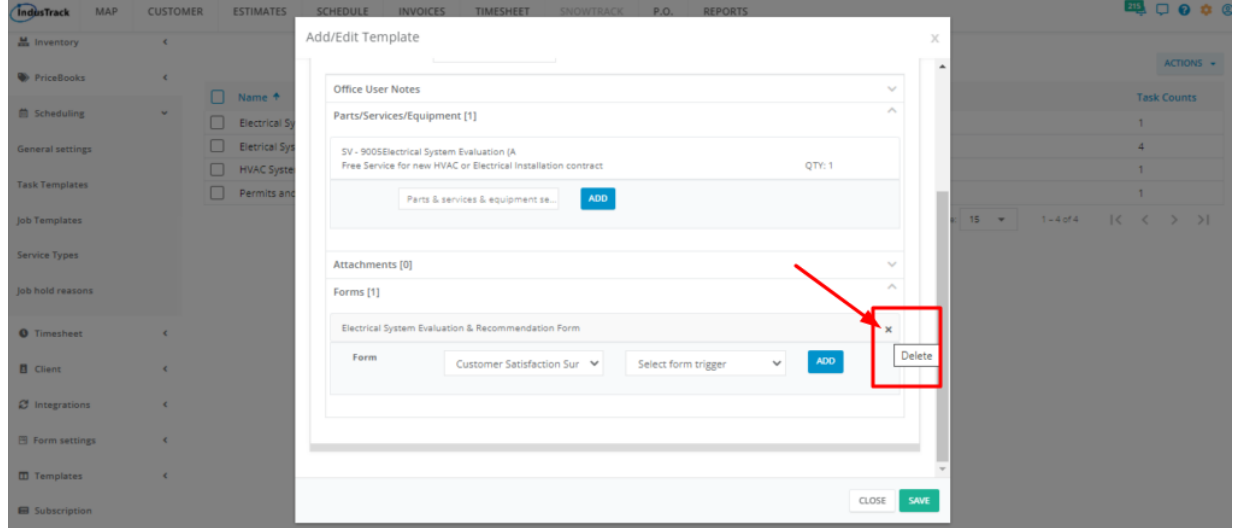


Update the template as may be needed.

- To remove a task from the Task Template, click the **Delete Task** button.



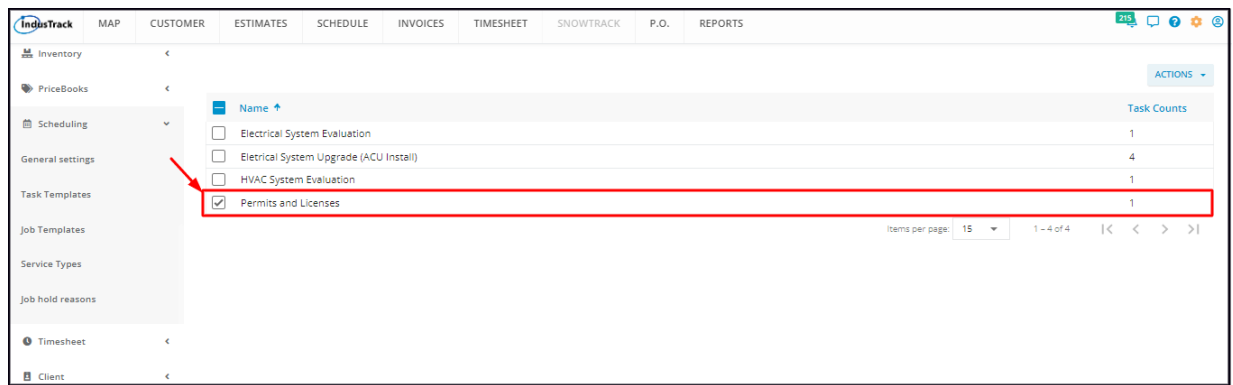
- To remove a form, an attachment or a part/service/equipment, click the **delete icon (x)** to the right of the item to be deleted.



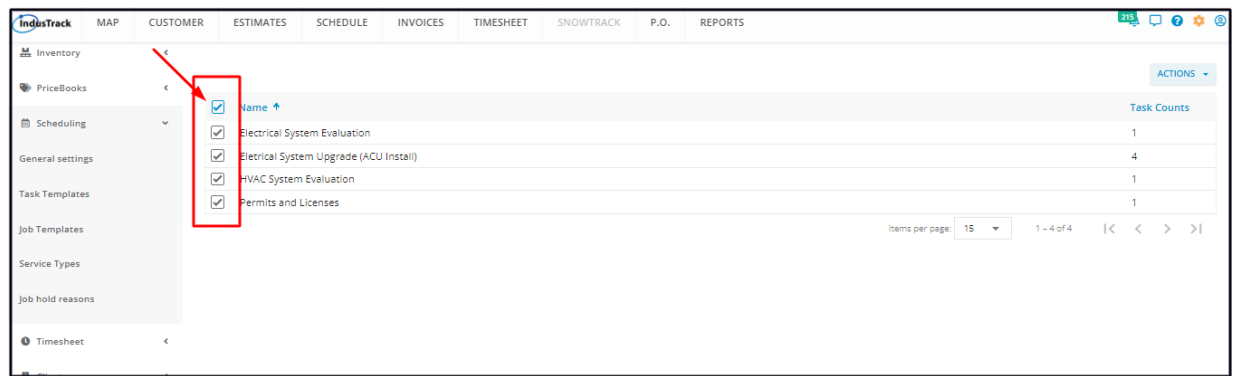
# Delete a Task Template

Delete a Task 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.

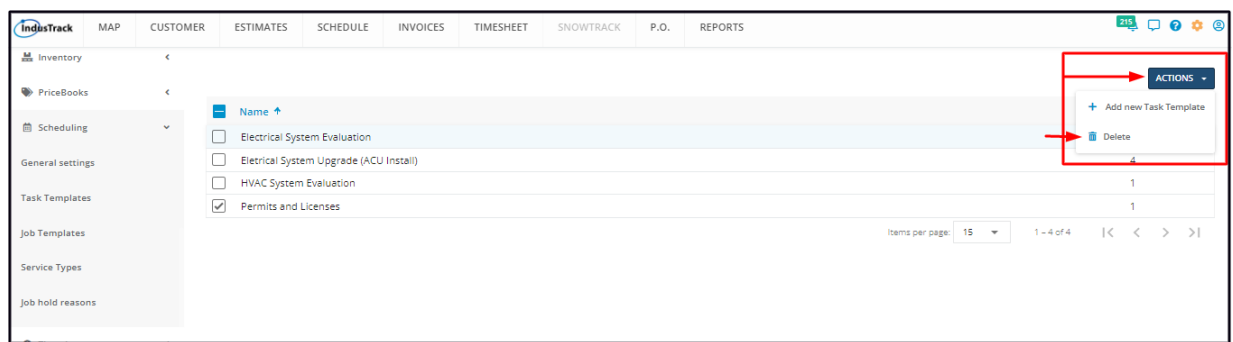
Find the task template to be deleted from the list. Tick the checkbox to its left.



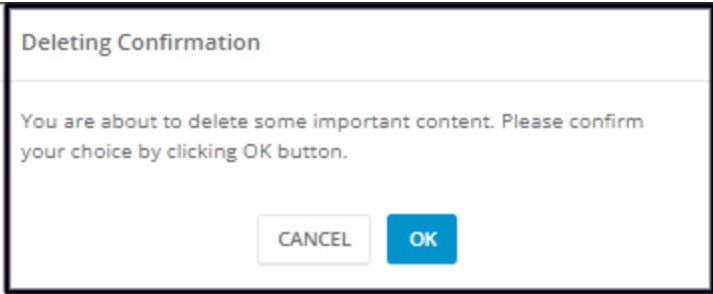
- To delete multiple task templates from the list, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.



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



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



The task template will be removed from the list.

