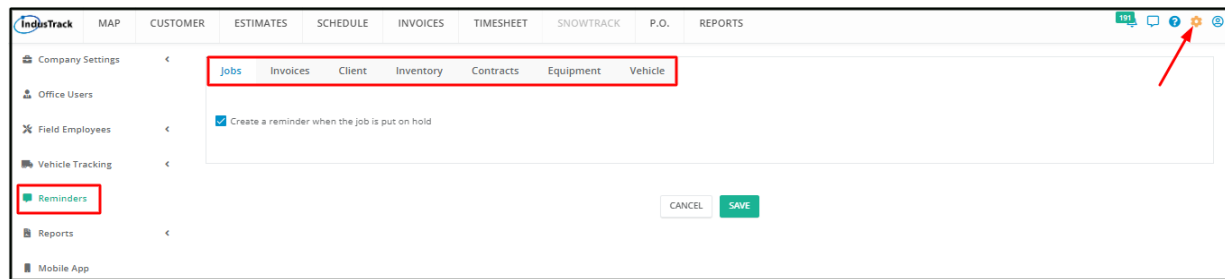


Set Up Reminders

IndusTrack provides reminders/notifications that can be set up to automatically send to customers and staff. These are a great way to keep everyone in the loop with due dates and expiration dates without manually contacting each of them individually.

To set up your Reminders, go to **Settings > Reminders**.

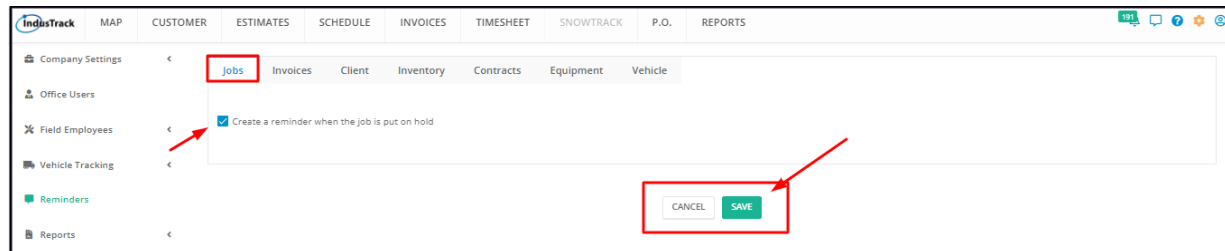
Reminder settings are divided into 7 categories: Jobs, Invoices, Clients, Inventory, Contracts, Equipment, and Vehicles.



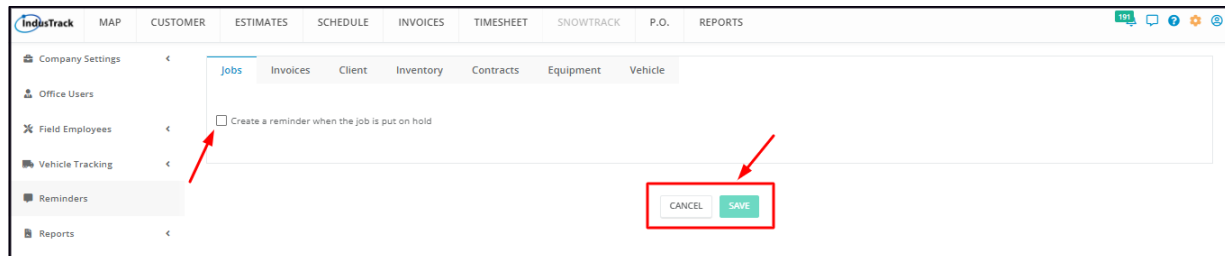
Jobs

The Jobs reminder sends out notifications when a job is put on hold.

To enable this reminder, tick the checkbox of the “**Create a Reminder when the job is put on hold**” and **Save**.



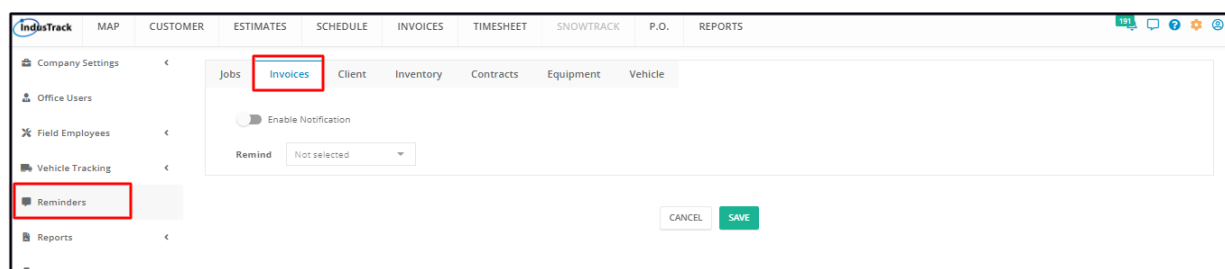
To disable this reminder, deselect the Create a Reminder option and Save.



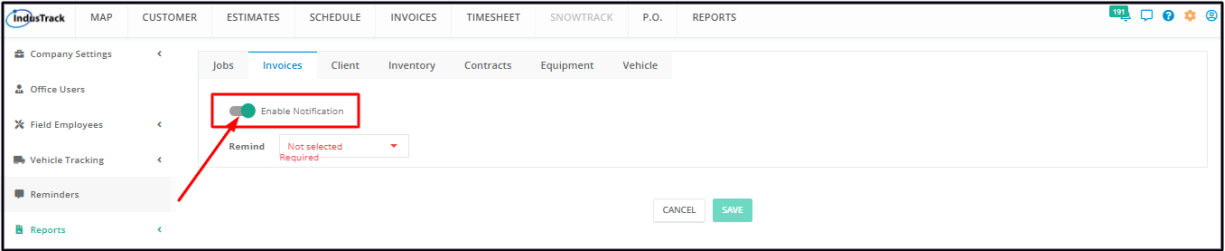
Invoices

The Invoice reminder feature is a great way for pulling in payments. The trigger for this notification to fire is an unpaid invoice. When this will happen is dependent on the reminder settings.

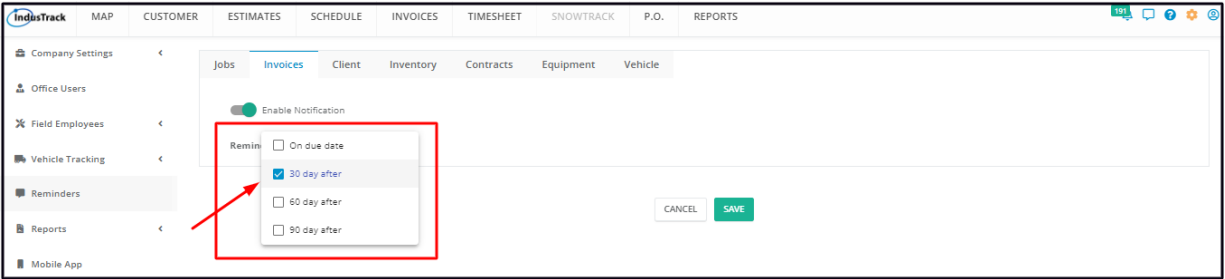
See the article [Template Settings: Email Templates](#), [Email Template for Invoice Reminders](#) to learn how to customize the Invoice Reminder template. This template is the email that will be sent to the customer if this Invoice Reminder is enabled and the conditions for the trigger are met.



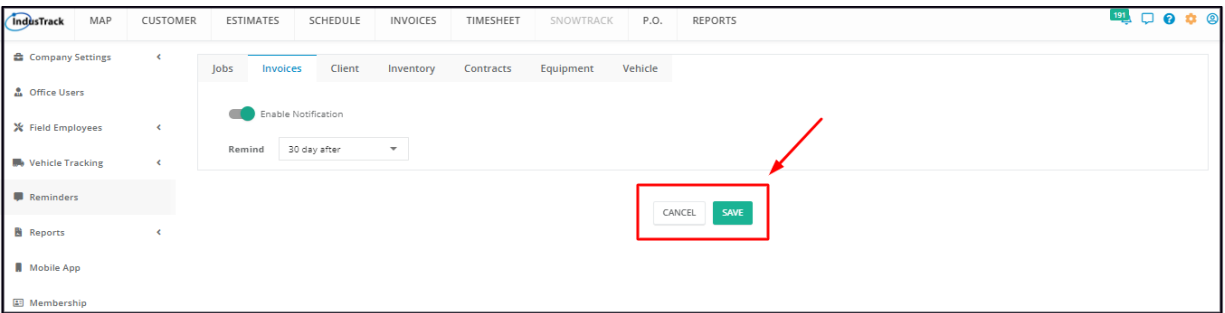
Enable the reminder by clicking the slider button to toggle the reminder to **ON** (green highlight).



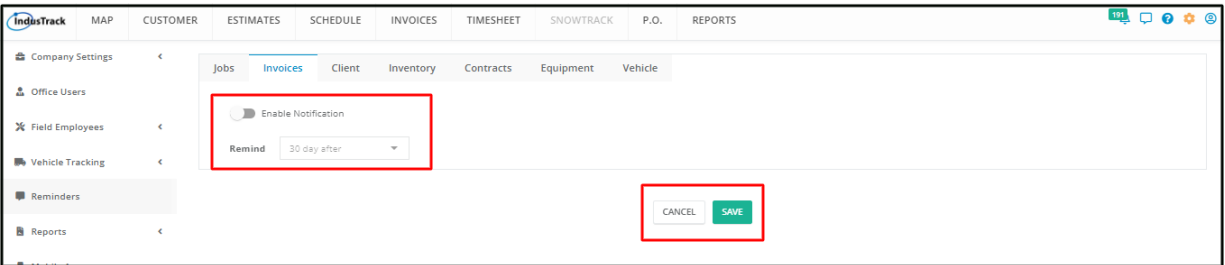
Set the 2nd condition for the reminder to send. This could either be by the due date or a specific number of days (30, 60 or 90 days) after this has passed.



Save the reminder.



To disable it, click the slider button to toggle the reminder to **OFF** (grey highlight) and Save.

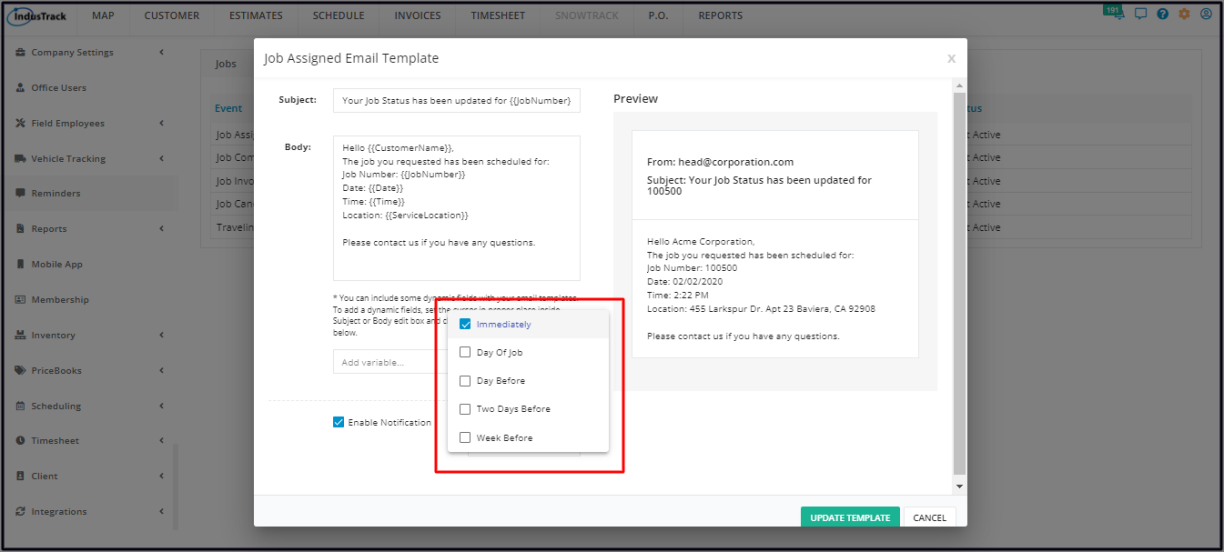


Client

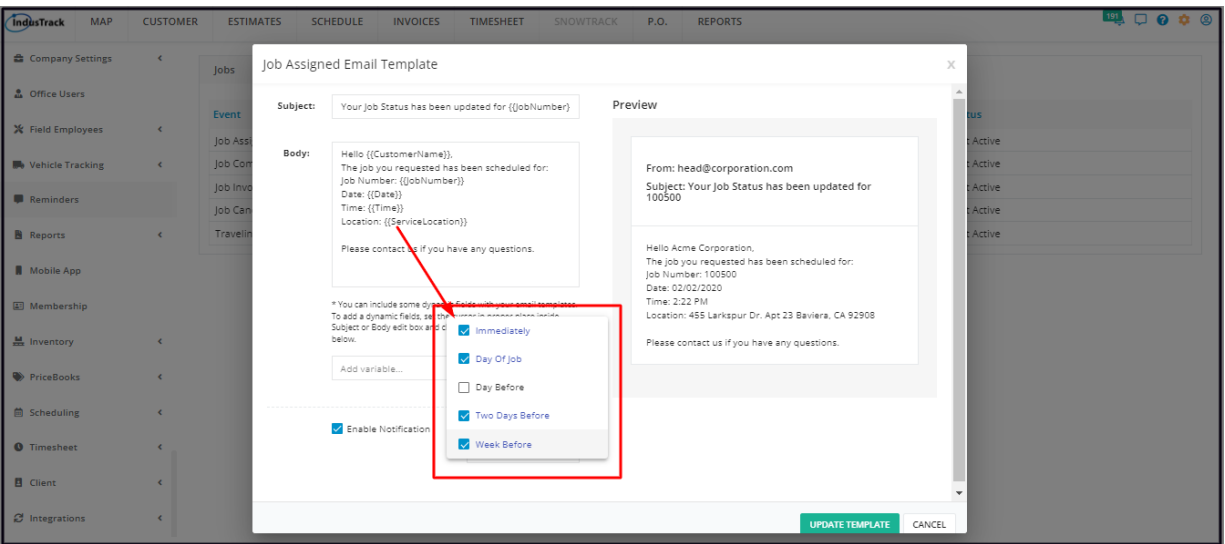
The Client Reminders are a great way to keep your customers in the loop with the statuses of the jobs they requested or contracted without manually contacting each of them individually.

The Client Reminders consist of 5 Job notifications. Click to open the email template for each of the events that will cause the reminder to automatically send.

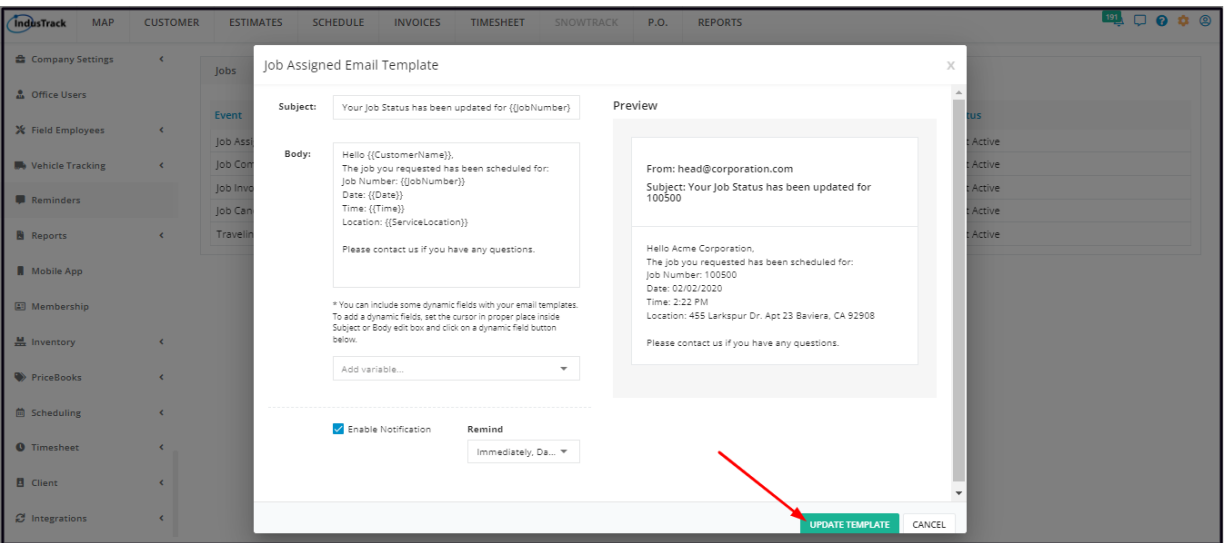
- Job Assigned
- Job Completed
- Job Invoiced
- Job Canceled
- Traveling to Job



You also have the option to send the reminder multiple times. Select all the preferred frequencies from the drop-down. The reminder will send on all of those days.



Update the template. The Job Assigned Reminder will be Activated.



Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you requested h...	Hello {{CustomerName}}, The job you requested h...	Active
Job Completed	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you recently req...	Hello {{CustomerName}}, The job you recently req...	Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Invoice for job {{Job...	Hello {{CustomerName}}, The Invoice for job {{Job...	Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you recently req...	Hello {{CustomerName}}, The job you recently req...	Not Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To **disable the reminder**, deselect Enable Notification and Update the template.

Job Assigned Email Template

Subject: Your Job Status has been updated for {{JobNumber}}

Body: Hello {{CustomerName}},
The job you requested has been scheduled for:
Job Number: {{JobNumber}}
Date: {{Date}}
Time: {{Time}}
Location: {{ServiceLocation}}

Please contact us if you have any questions.

Preview:

From: head@corporation.com
Subject: Your Job Status has been updated for 100500

Hello Acme Corporation,
The job you requested has been scheduled for:
Job Number: 100500
Date: 02/02/2020
Time: 2:22 PM
Location: 455 Larkspur Dr. Apt 23 Baviera, CA 92008

Please contact us if you have any questions.

☐ **Enable Notification**

Remind
Immediately, Da...

UPDATE TEMPLATE **CANCEL**

Job Completed

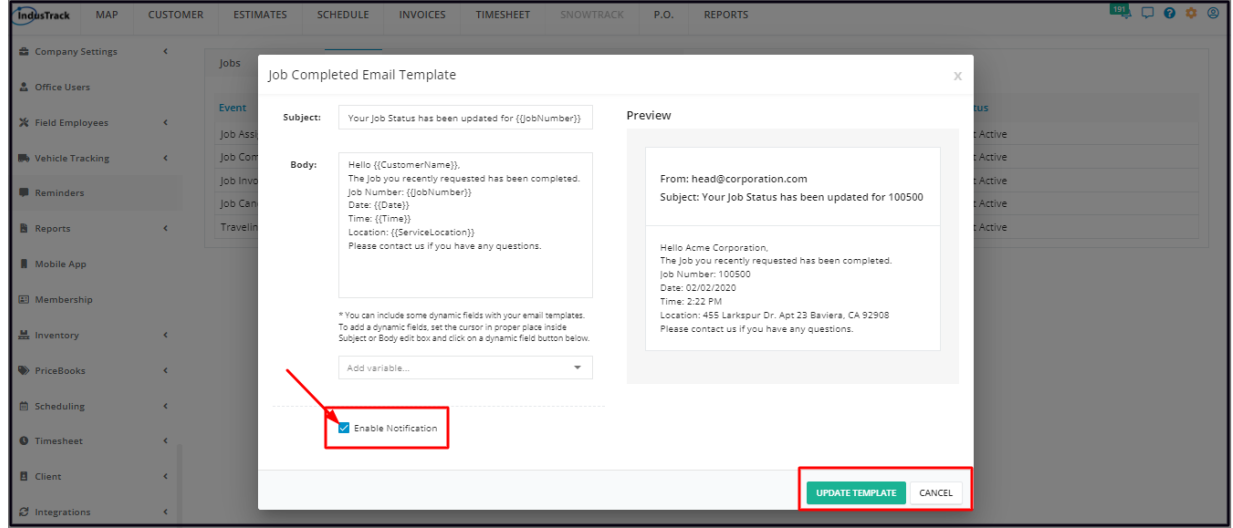
This email reminder/notification is sent to the customer when the job requested/contracted status has been updated to Completed. The notification includes the customer name, job number, date and time of completion, and location.

Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you requested h...	Hello {{CustomerName}}, The job you requested h...	Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you recently req...	Hello {{CustomerName}}, The job you recently req...	Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Invoice for job {{Job...	Hello {{CustomerName}}, The Invoice for job {{Job...	Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you recently req...	Hello {{CustomerName}}, The job you recently req...	Not Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To view or update the template, click anywhere on the row. This will open the editable Job Completed Email template. To edit/update the template, see the section **How to Update a Template** below.

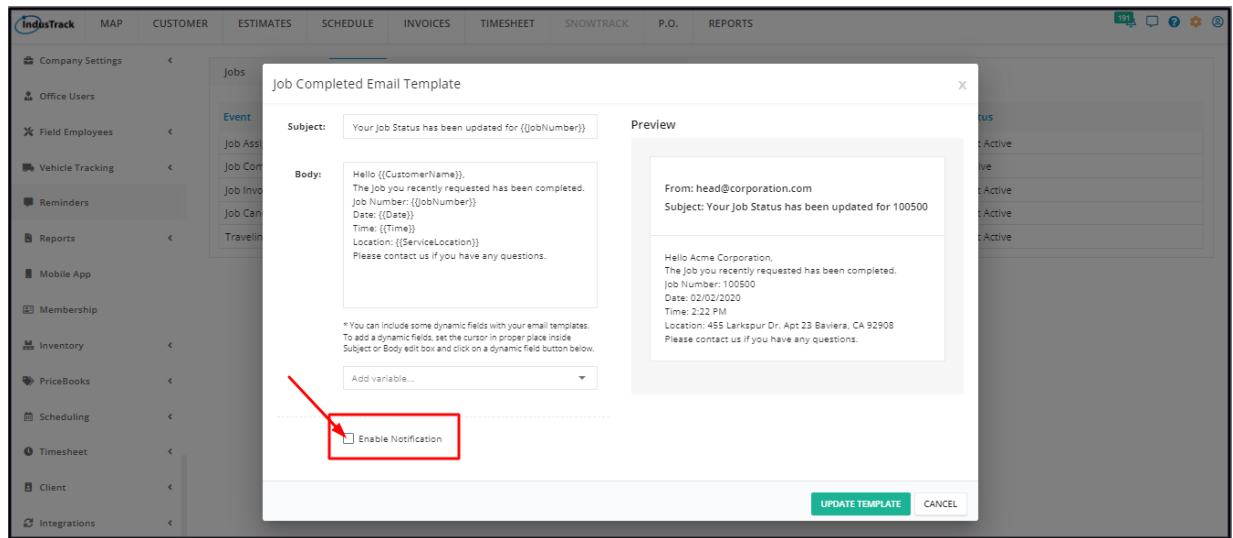
Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you requested h...	Hello {{CustomerName}}, The job you requested h...	Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you recently req...	Hello {{CustomerName}}, The job you recently req...	Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Invoice for job {{Job...	Hello {{CustomerName}}, The Invoice for job {{Job...	Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you recently req...	Hello {{CustomerName}}, The job you recently req...	Not Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To **enable the reminder**, open the Job Completed Email Template. Click on the checkbox of **Enable Notification** and **Update**. The Job Completed Reminder will be Activated.



Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The job you requested h...		Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Job you recently req...		Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Invoice for Job {{Job...		Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Job you recently req...		Not Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To disable the reminder, deselect Enable Notification and Update the template.



Job Invoiced

This email reminder/notification is sent when the Job Invoice is forwarded to the customer. The notification includes the customer's name, job number, date of completion, and location.

Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The job you requested h...		Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Job you recently req...		Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Invoice for job {{Job...		Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Job you recently req...		Not Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To view or update the template, click anywhere on the row. This will open the editable Job Invoiced Email template. To edit/update the template, see the section **How to Update a Template** below.

Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you requested h...		Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Invoice for Job {{Job...}}		Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Not Active
Traveling to Job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To **enable the reminder**, open the Job Invoiced Email Template. Click on the checkbox of **Enable Notification and Update**. The Job Invoiced Reminder will be Activated.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

Company Settings

Office Users

Field Employees

Vehicle Tracking

Reminders

Reports

Mobile App

Membership

Inventory

PriceBooks

Scheduling

Timesheet

Client

Integrations

Jobs

Invoices

Client

Inventory

Contracts

Equipment

Vehicle

Job Assigned

Job Completed

Job Invoiced

Job Canceled

Traveling to Job

Subject:

Your Job Status has been updated for {{JobNumber}}

Body:

Hello {{CustomerName}},
The Invoice for Job {{JobNumber}} has been sent to you. The job was completed on {{Date}} at {{ServiceLocation}}.
Please contact us if you have any questions.

Preview

From: head@corporation.com
Subject: Your Job Status has been updated for 100500

Hello Acme Corporation,
The Invoice for Job 100500 has been sent to you. The job was completed on 02/02/2020 at 455 Larkspur Dr. Apt 23 Baviera, CA 92908.
Please contact us if you have any questions.

☒ Enable Notification

UPDATE TEMPLATE

CANCEL

Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The job you requested h...		Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Invoice for Job {{Job...}}		Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Not Active
Traveling to Job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To **disable the reminder**, deselect Enable Notification and Update the template.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

Company Settings

Office Users

Field Employees

Vehicle Tracking

Reminders

Reports

Mobile App

Membership

Inventory

PriceBooks

Scheduling

Timesheet

Client

Integrations

Jobs

Invoices

Client

Inventory

Contracts

Equipment

Vehicle

Job Assigned

Job Completed

Job Invoiced

Job Canceled

Traveling to Job

Subject:

Your Job Status has been updated for {{JobNumber}}

Body:

Hello {{CustomerName}},
The Invoice for Job {{JobNumber}} has been sent to you. The job was completed on {{Date}} at {{ServiceLocation}}.
Please contact us if you have any questions.

Preview

From: head@corporation.com
Subject: Your Job Status has been updated for 100500

Hello Acme Corporation,
The Invoice for Job 100500 has been sent to you. The job was completed on 02/02/2020 at 455 Larkspur Dr. Apt 23 Baviera, CA 92908.
Please contact us if you have any questions.

☐ Enable Notification

UPDATE TEMPLATE

CANCEL

Job Canceled

This email reminder/notification is sent when the Job requested/contracted has been canceled.

Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you requested h...		Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Invoice for job {{Job...		Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Not Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

The notification includes the customer's name, job number, date and time of cancellation, and location. The reason why the job was canceled is not included in the template. Edit/update the template to include this, if preferred.

To view or update the template, click anywhere on the row. This will open the editable Job Canceled Email template. To edit/update the template, see the section **How to Update a Template** below.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

Company Settings

Office Users

Field Employees

Vehicle Tracking

Reminders

Reports

Mobile App

Membership

Inventory

PriceBooks

Scheduling

Timesheet

Client

Integrations

Jobs

Event

Job Assigned

Job Completed

Job Invoiced

Job Canceled

Traveling to job

Job Canceled Email Template

Subject: Your Job Status has been updated for {{JobNumber}}

Body:

Hello {{CustomerName}},
The Job you recently requested has been cancelled.
Job Number: {{JobNumber}}
Date: {{Date}}
Time: {{Time}}
Location: {{ServiceLocation}}
Please contact us if you have any questions or would like to reschedule.

* You can include some dynamic fields with your email templates. To add a dynamic field, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below.

Add variable...

☐ Enable Notification

UPDATE TEMPLATE

CANCEL

Preview

From: head@corporation.com
Subject: Your Job Status has been updated for 100500

Hello Acme Corporation,
The job you recently requested has been cancelled.
Job Number: 100500
Date: 02/02/2020
Time: 2:22 PM
Location: 455 Larkspur Dr, Apt 23 Baviera, CA 92908
Please contact us if you have any questions or would like to reschedule.

To **enable the reminder**, open the Job Canceled Email Template. Click on the checkbox of **Enable Notification** and **Update**. The Job Canceled Reminder/Notification will be Activated.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

Company Settings

Office Users

Field Employees

Vehicle Tracking

Reminders

Reports

Mobile App

Membership

Inventory

PriceBooks

Scheduling

Timesheet

Client

Integrations

Jobs

Event

Job Assigned

Job Completed

Job Invoiced

Job Canceled

Traveling to job

Job Canceled Email Template

Subject: Your Job Status has been updated for {{JobNumber}}

Body:

Hello {{CustomerName}},
The Job you recently requested has been cancelled.
Job Number: {{JobNumber}}
Date: {{Date}}
Time: {{Time}}
Location: {{ServiceLocation}}
Please contact us if you have any questions or would like to reschedule.

* You can include some dynamic fields with your email templates. To add a dynamic field, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below.

Add variable...

☒ Enable Notification

UPDATE TEMPLATE

CANCEL

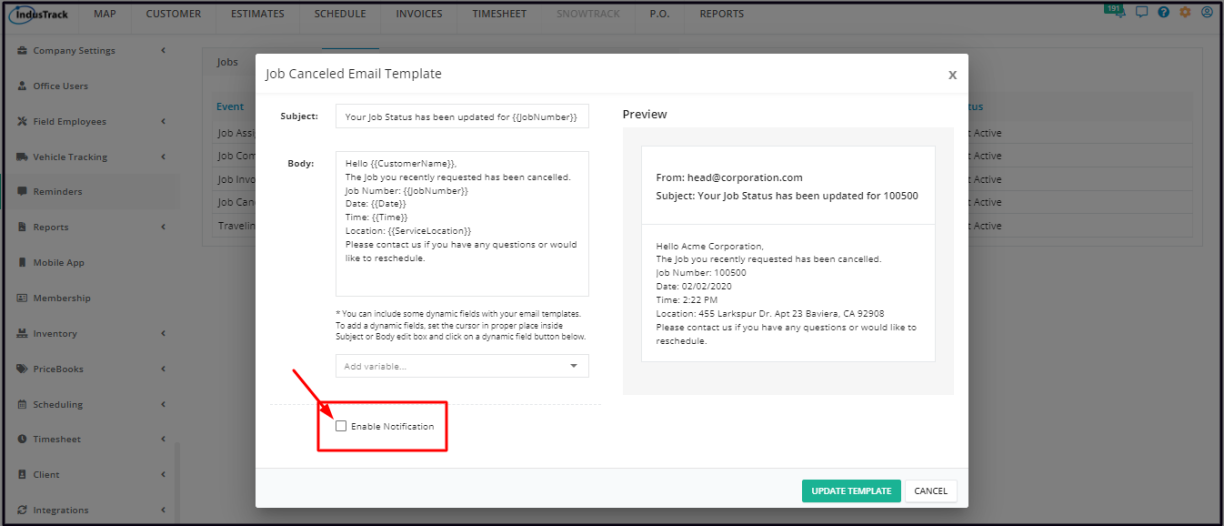
Preview

From: head@corporation.com
Subject: Your Job Status has been updated for 100500

Hello Acme Corporation,
The job you recently requested has been cancelled.
Job Number: 100500
Date: 02/02/2020
Time: 2:22 PM
Location: 455 Larkspur Dr, Apt 23 Baviera, CA 92908
Please contact us if you have any questions or would like to reschedule.

Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you requested h...		Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Invoice for job {{Job...		Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}. Hello {{CustomerName}}, The Job you recently req...		Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Not Active

To **disable the reminder**, deselect Enable Notification and Update the template.



Travelling to Job

This email reminder/notification is sent to let the customer know that the Field Employee is on his way to perform the job requested/contracted. The notification includes the customer's name, job number, location, and the estimated Time of Arrival.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

89%

Company Settings

Office Users

Field Employees

Vehicle Tracking

Reminders

Reports

Jobs

Invoices

Client

Inventory

Contracts

Equipment

Vehicle

Event

Email Subject

Email Body

Status

Job Assigned

Your Job Status has been updated for {{JobNumbe... Hello {{CustomerName}}}, The Job you requested h...

Not Active

Job Completed

Your Job Status has been updated for {{JobNumbe... Hello {{CustomerName}}}, The Job you recently req...

Not Active

Job Invoiced

Your Job Status has been updated for {{JobNumbe... Hello {{CustomerName}}}, The Invoice for Job {{Job...

Not Active

Job Canceled

Your Job Status has been updated for {{JobNumbe... Hello {{CustomerName}}}, The Job you recently req...

Not Active

Traveling to job

Traveling to job - {{JobNumber}}

Hello {{CustomerName}}, The technician is on his ...

Not Active

To view or update the template, click anywhere on the row. This will open the editable Travelling to Job Email template. To edit/update the template, see the section **How to Update a Template** below.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

Company Settings

Office Users

Field Employees

Vehicle Tracking

Reminders

Reports

Jobs

Invoices

Client

Inventory

Contracts

Equipment

Vehicle

Event

Email Subject

Email Body

Status

Job Assigned

Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Job you requested h...

Not Active

Job Completed

Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Job you recently req...

Not Active

Job Invoiced

Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Invoice for Job {{Job...

Not Active

Job Canceled

Your Job Status has been updated for {{JobNumber}}... Hello {{CustomerName}}, The Job you recently req...

Not Active

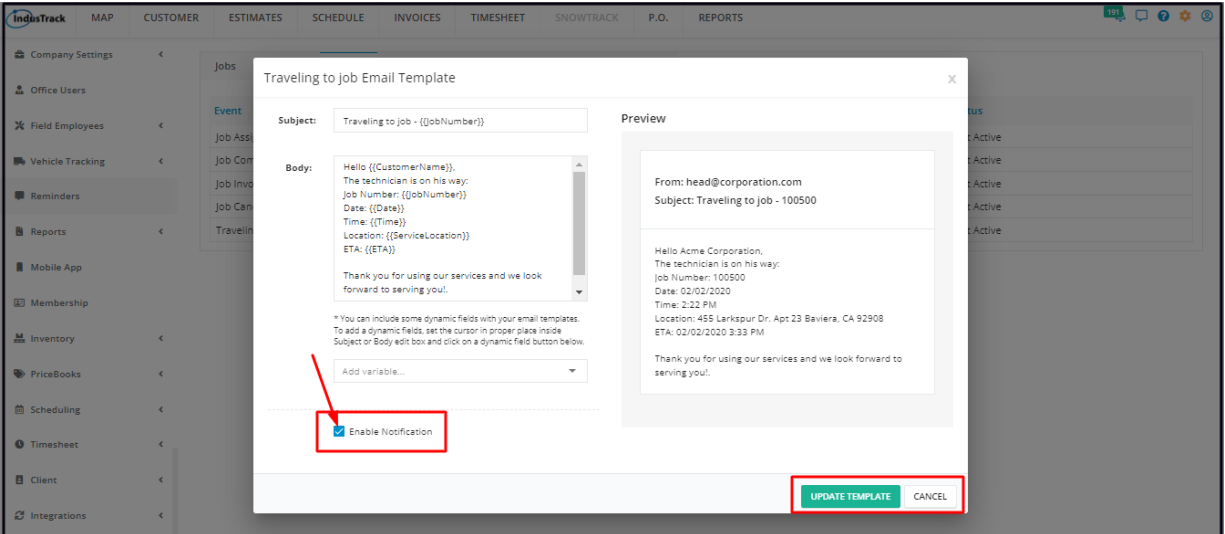
Traveling to job

Traveling to job - {{JobNumber}}

Hello {{CustomerName}}, The technician is on his ...

Not Active

To **enable the reminder**, open the Traveling to Job Email Template. Click on the checkbox of **Enable Notification** and **Update**. The Traveling to Job Reminder/Notification will be Activated.



IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS				
Company Settings	Jobs	Invoices	Client	Inventory
Office Users				
Field Employees				
Vehicle Tracking				
Reminders				
Reports				

Event	Email Subject	Email Body	Status
Job Assigned	Your Job Status has been updated for {{JobNumber}}...	Hello {{CustomerName}}, The job you requested h...	Not Active
Job Completed	Your Job Status has been updated for {{JobNumber}}...	Hello {{CustomerName}}, The job you recently req...	Not Active
Job Invoiced	Your Job Status has been updated for {{JobNumber}}...	The Invoice for job {{JobNumber}}...	Not Active
Job Canceled	Your Job Status has been updated for {{JobNumber}}...	Hello {{CustomerName}}, The job you recently req...	Not Active
Traveling to job	Traveling to job - {{JobNumber}}	Hello {{CustomerName}}, The technician is on his ...	Active

To disable the reminder, deselect Enable Notification and Update the template.

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

Company Settings
Office Users
Field Employees
Vehicle Tracking
Reminders
Reports
Mobile App
Membership
Inventory
PriceBooks
Scheduling
Timesheet
Client
Integrations

Traveling to job Email Template

Subject: Traveling to job - {{JobNumber}}

Body:
Hello {{CustomerName}},
The technician is on his way:
Job Number: {{JobNumber}}
Date: {{Date}}
Time: {{Time}}
Location: {{ServiceLocation}}
ETA: {{ETA}}

Thank you for using our services and we look forward to serving you!

* You can include some dynamic fields with your email templates. To add a dynamic field, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below.

Add variable...

☐ Enable Notification

UPDATE TEMPLATE CANCEL

Preview

From: head@corporation.com
Subject: Traveling to job - 100500

Hello Acme Corporation,
The technician is on his way:
Job Number: 100500
Date: 02/02/2020
Time: 2:22 PM
Location: 455 Larkspur Dr, Apt 23 Baviera, CA 92908
ETA: 02/02/2020 3:33 PM

Thank you for using our services and we look forward to serving you!

How to Update a Client Reminder Template

The 5 Client Reminder email templates have all been pre-formatted and are ready to be used when enabled. The templates can, however, be revised according to your preferences.

To edit the **Subject**, click on the field and update as needed.

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

Company Settings
Office Users
Field Employees
Vehicle Tracking
Reminders
Reports
Mobile App
Membership
Inventory
PriceBooks
Scheduling
Timesheet
Client
Integrations

Job Invoiced Email Template

Subject: Your Job Status has been updated for {{JobNumber}}

Body:
Hello {{CustomerName}},
The invoice for job {{JobNumber}} has been sent to you. The job was completed on {{Date}} at {{ServiceLocation}}.
Please contact us if you have any questions.

* You can include some dynamic fields with your email templates. To add a dynamic field, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below.

Add variable...

☐ Enable Notification

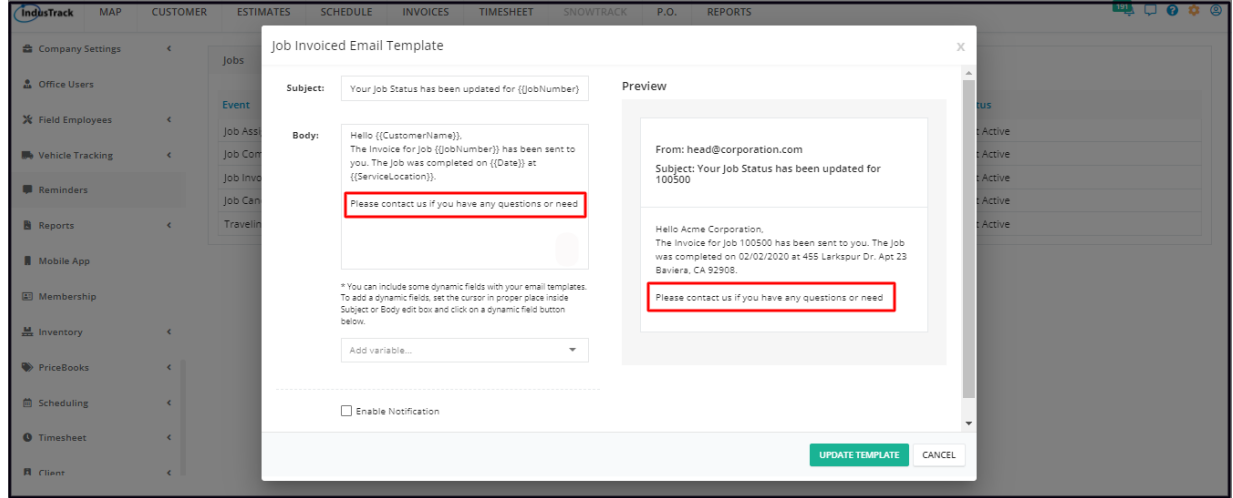
UPDATE TEMPLATE CANCEL

Preview

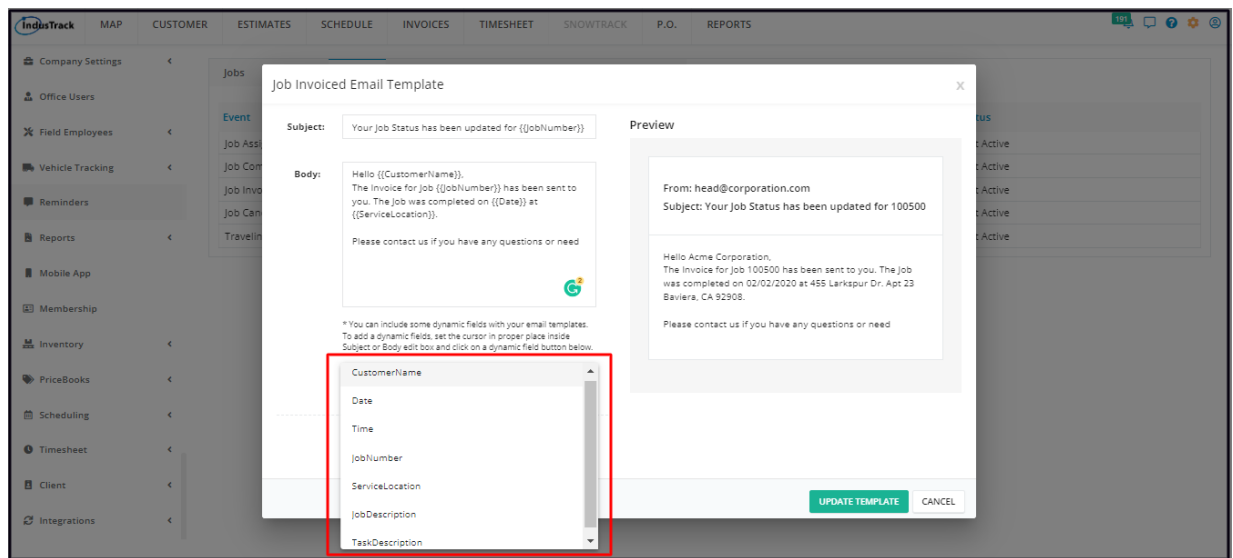
From: head@corporation.com
Subject: Your Job Status has been updated for 100500

Hello Acme Corporation,
The invoice for job 100500 has been sent to you. The job was completed on 02/02/2020 at 455 Larkspur Dr, Apt 23 Baviera, CA 92908.
Please contact us if you have any questions.

To edit or update the email **Body**, change the text or key in a new or revised message on the field. The **Preview** will auto-update as you go along.



To add **dynamic fields**, set the cursor in the proper place inside the Subject or Body edit box and select a dynamic field from the *Add Variable* drop-down list. Be careful not to edit/change any letter or character of the dynamic fields as these will not work.



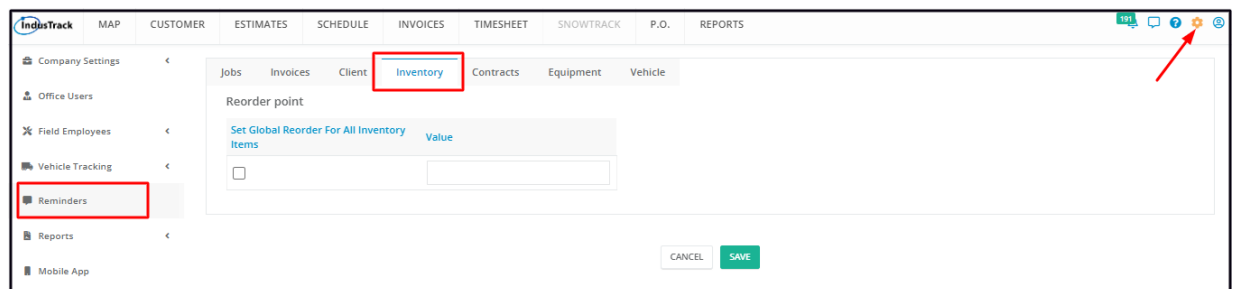
Once done, **Update the Template**.

Inventory

Keeping track of inventory is a key task for businesses that sell products and use a large number of supplies in the delivery of service. Set the ideal re-order levels you would like to maintain for each of your items.

Under the Reminders settings, IndusTrack gives you an option to set a Global Reorder level for all of the items on your Inventory List.

To set the Global Reorder Level, go to **Settings > Reminders > Inventory**.



Tick the checkbox of the settings field in order to enable Global Reorder.

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

Company Settings Office Users Field Employees Vehicle Tracking Reminders Reports Mobile App

Jobs Invoices Client **Inventory** Contracts Equipment Vehicle

Reorder point

Set Global Reorder For All Inventory Items Value

☒ 1

CANCEL SAVE

Key in the Reorder level on the Value field.

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

Company Settings Office Users Field Employees Vehicle Tracking Reminders Reports Mobile App

Jobs Invoices Client **Inventory** Contracts Equipment Vehicle

Reorder point

Set Global Reorder For All Inventory Items Value

☒ 25

CANCEL SAVE

Save the Global Reorder Point. This will now be the reorder point for all of the inventories on hand. Any reorder point that has been individually set will be overwritten.

A reminder/notification will be sent out once the inventory item reaches this reorder level.

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

Company Settings Office Users Field Employees Vehicle Tracking Reminders Reports Mobile App

Jobs Invoices Client **Inventory** Contracts Equipment Vehicle

Reorder point

Set Global Reorder For All Inventory Items Value

☒ 25

CANCEL SAVE

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

Vehicle Tracking Reminders Reports Mobile App Membership Inventory

General

Name * Forged Piston Lit

SKU fp3838

Vendor RS Spare Parts

Non taxable ☐

Stock

Asset Account Inventory Asset

Main warehouse quantity on hand * 1499

Reorder point 25

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

Warehouse Bin # Isle # QTY

ACTIONS On Hand

To **edit/change** the Global Reorder Point, go to the Inventory tab of Reminders and change the value. Once done, save.

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

Vehicle Tracking Reminders Reports Mobile App Membership Inventory PriceBooks

Jobs Invoices Client **Inventory** Contracts Equipment Vehicle

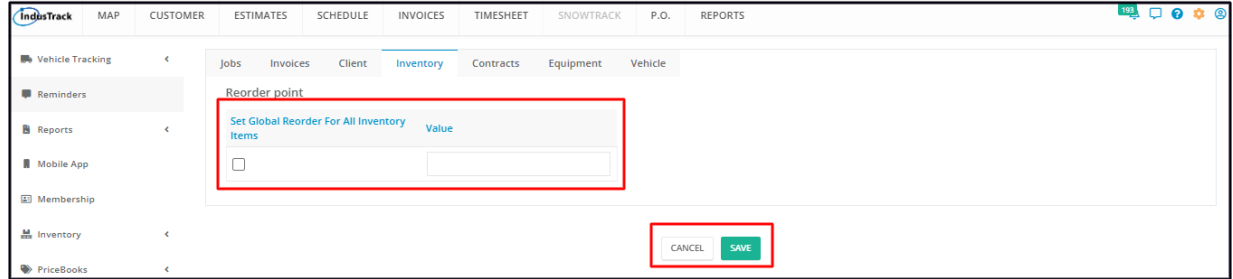
Reorder point

Set Global Reorder For All Inventory Items Value

☒ 33

CANCEL SAVE

To disable the Global Reorder Point, deselect the checkbox. Save the changes.



Contracts

Contract Expiration and Upcoming Services reminders are set at **Settings > Reminders > Contracts**.

Service Contract Expiration

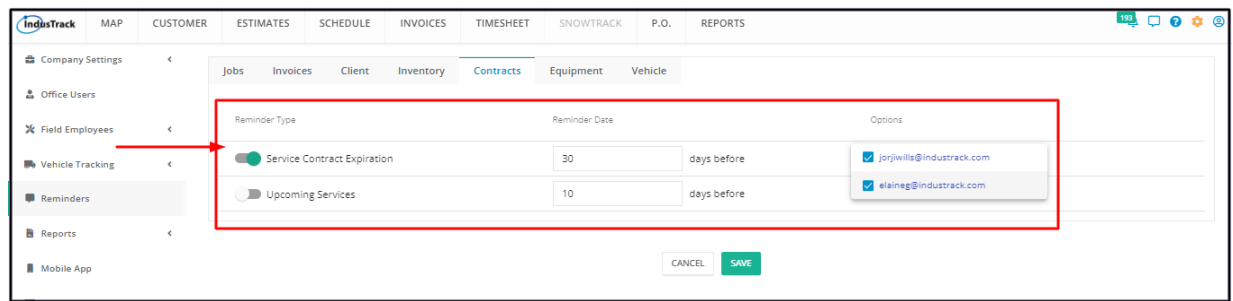
Create Service Agreements with expiration dates under the Customer’s Book. With IndusTrack’s Contract Reminder Settings, set up reminder emails to be sent to specific staff in order to offer renewal and continue the business with the client.

To enable the reminder, click the slider button to toggle it to **ON** (green highlight).

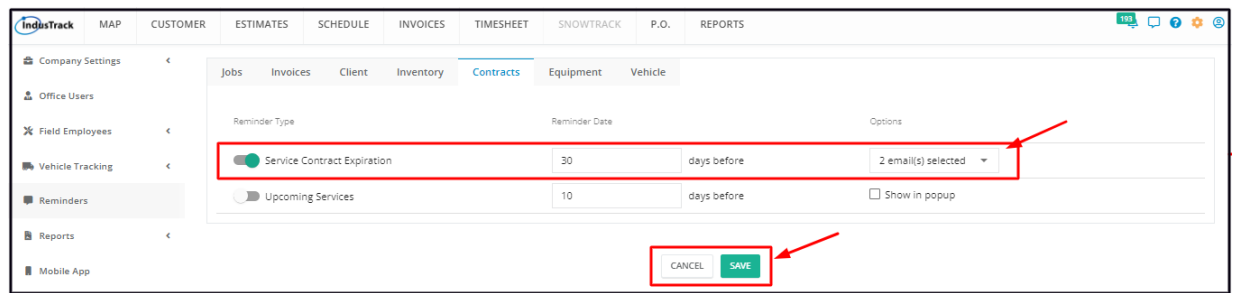
Key in the number of days before the contract expiration the reminder will auto-send.

Select the Office Users who will receive the reminder. You can choose more than one.

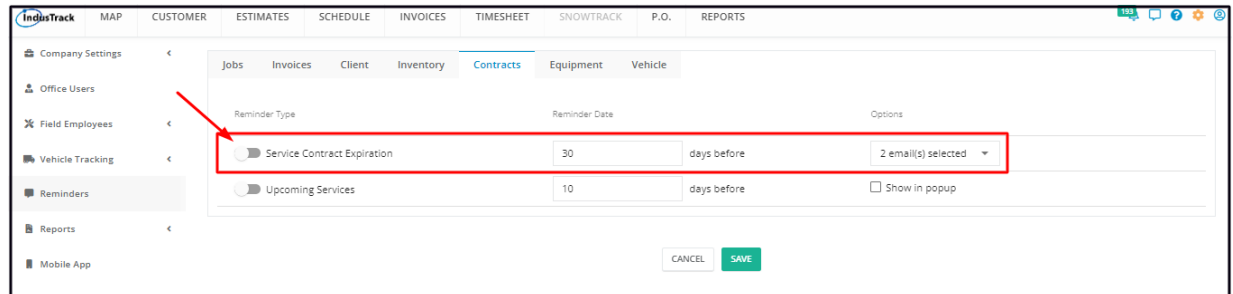
Save the reminder.



To **edit** the reminder – change the frequency or add/remove notification recipients – go to the setting, do the changes and Save.



To disable the reminder, click the slider button to toggle it to **OFF** (grey highlight) and Save.



Upcoming Services

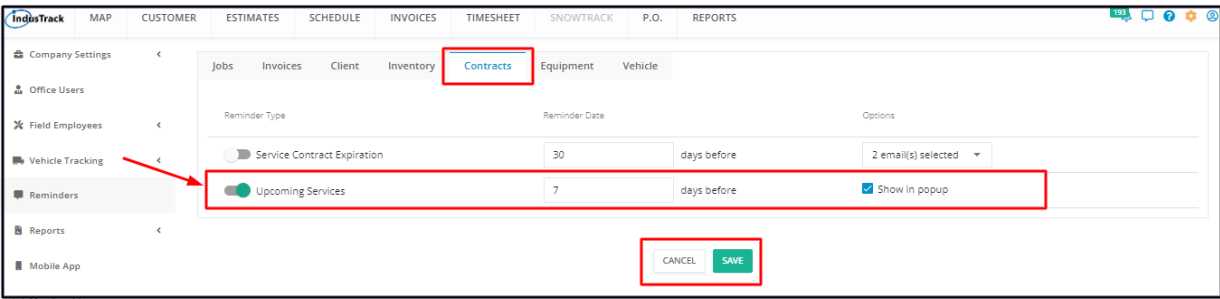
Set up upcoming service schedule reminders so that you or your staff are well prepared for the activity or do not miss an appointment or be late for one.

To **enable** the reminder, click the slider button to toggle it to **ON** (green highlight).

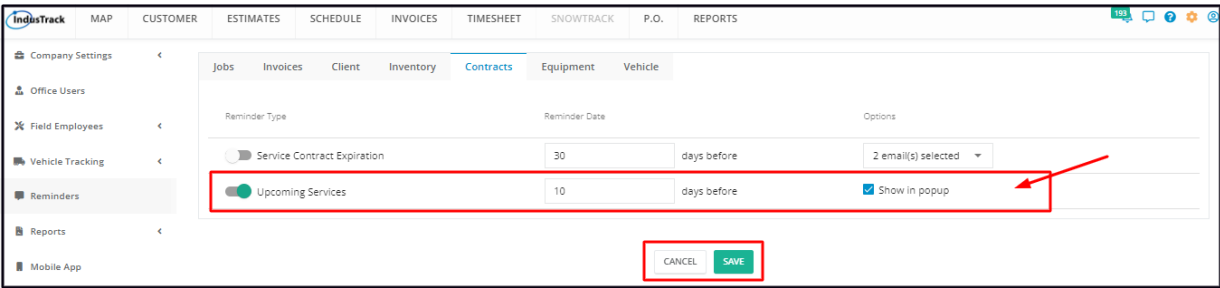
Key in the number of days before the schedule the reminder will auto-send.

Select to show the reminder in a popup by ticking the checkbox. Untick the checkbox if this is not preferred.

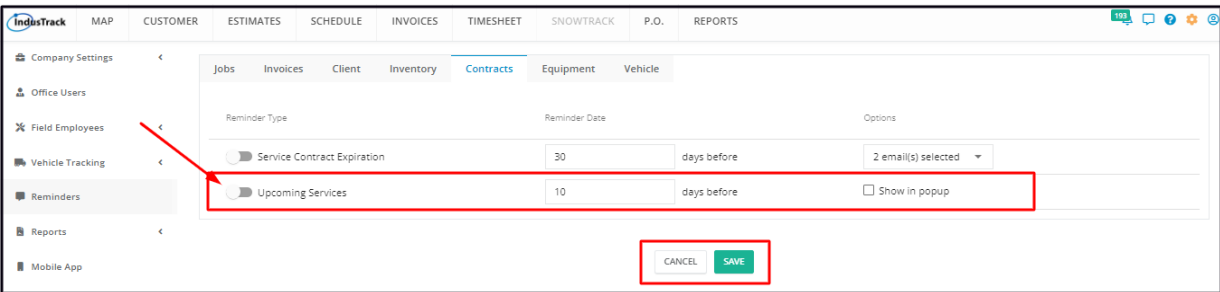
Save the reminder.



To **edit** the reminder go to the setting, do the changes and Save.



To disable the reminder, click the slider button to toggle it to **OFF** (grey highlight) and Save.



Equipment

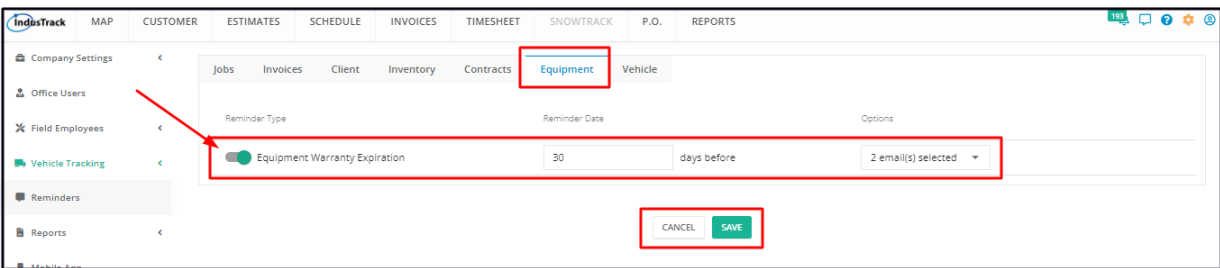
The Customer's Book, Equipment tab contains a listing of all the equipment/hardware that the customer has purchased from you or any equipment from third-party vendors that you track. For ease of monitoring the warranty expirations of the pieces of equipment, set up reminders to be sent according to your needs.

To enable the reminder, click the slider button to toggle it to **ON** (green highlight).

Key in the number of days before the equipment warranty expiration the reminder will auto-send.

Select the Office Users who will receive the reminder. You can choose more than one.

Save the reminder. If the customer has multiple equipments, the reminders will be sent based on the individual warranty expiration.



To **edit** the reminder – change the frequency or add/remove notification recipients – go to the setting, do the changes and Save.

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

Company Settings < Office Users < Field Employees < Vehicle Tracking < Reminders < Reports <

Jobs Invoices Client Inventory Contracts **Equipment** Vehicle

Reminder Type Reminder Date Options

☒ Equipment Warranty Expiration 15 days before 2 email(s) selected

CANCEL SAVE

To disable the reminder, click the slider button to toggle it to **OFF** (grey highlight) and Save.

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

Company Settings < Office Users < Field Employees < Vehicle Tracking < Reminders < Reports <

Jobs Invoices Client Inventory Contracts **Equipment** Vehicle

Reminder Type Reminder Date Options

☐ Equipment Warranty Expiration 15 days before 2 email(s) selected

CANCEL SAVE

Vehicle

The Vehicle Reminder Settings is the tab where notifications for both the Vehicles and the Field Employees, especially those assigned as Drivers, are set.

Reminders are set for renewals of Vehicle Registrations and the Field Employees' Licenses and Medical Card. Enabling, disabling and updating the reminders are the same for each reminder type.

Enable the Reminder

Click the slider button to toggle the reminder to ON (green highlight).

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

Company Settings < Office Users < Field Employees < Vehicle Tracking < Reminders < Reports < Mobile App < Membership <

Jobs Invoices Client Inventory Contracts **Equipment** **Vehicle**

Reminder Type Reminder Date Options

☒ Vehicle Registration 30 days before Email(s)

☒ License Renewal 30 days before Email(s)

☒ Medical Card Renewal 30 days before Email(s)

CANCEL SAVE

On the **Reminder Date** column set how many days before the renewal/expiration of the registration or license the reminder should be sent.

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

Company Settings < Office Users < Field Employees < Vehicle Tracking < Reminders < Reports < Mobile App < Membership < Inventory <

Jobs Invoices Client Inventory Contracts **Equipment** **Vehicle**

Reminder Type Reminder Date Options

☒ Vehicle Registration 30 days before Email(s)

☒ License Renewal 30 days before Email(s)

☒ Medical Card Renewal 30 days before Email(s)

CANCEL SAVE

On the **Options** column, select which of the Office Staff/Users should receive the reminder. You can choose more than one.

Reminder Type	Reminder Date	Options
Vehicle Registration	30 days before	2 email(s) selected
License Renewal	30 days before	2 email(s) selected
Medical Card Renewal	30 days before	2 email(s) selected

CANCEL SAVE

Once all the preferred reminders are set, **Save** the reminder.

Update the Reminder

To **edit** the reminder – change the frequency or add/remove notification recipients – go to the setting, do the changes and Save.

Reminder Type	Reminder Date	Options
Vehicle Registration	25 days before	2 email(s) selected
License Renewal	30 days before	1 email(s) selected
Medical Card Renewal	30 days before	2 email(s) selected

CANCEL SAVE

Disable the Reminder

Click the slider button to toggle the reminder to OFF (grey highlight) and Save.

Reminder Type	Reminder Date	Options
Vehicle Registration	25 days before	2 email(s) selected
License Renewal	30 days before	1 email(s) selected
Medical Card Renewal	30 days before	2 email(s) selected

CANCEL SAVE