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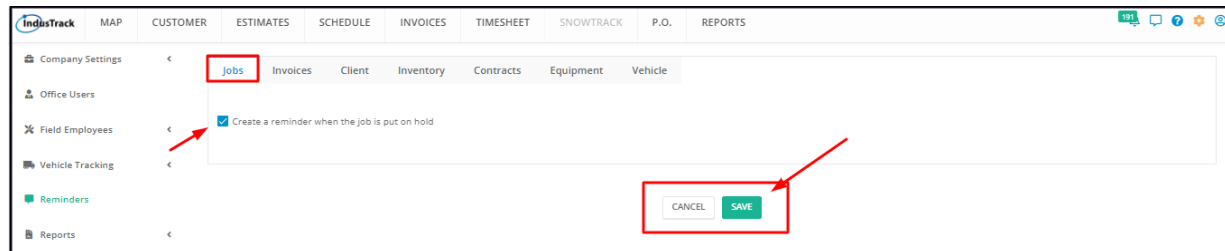
To set up your Reminders, go to **Settings > Reminders.**

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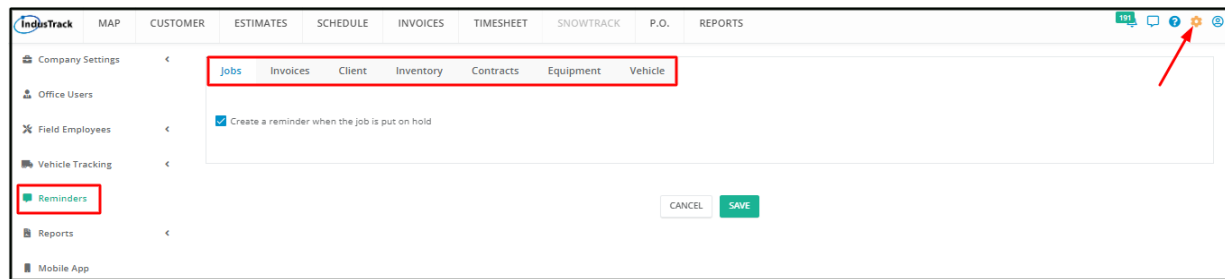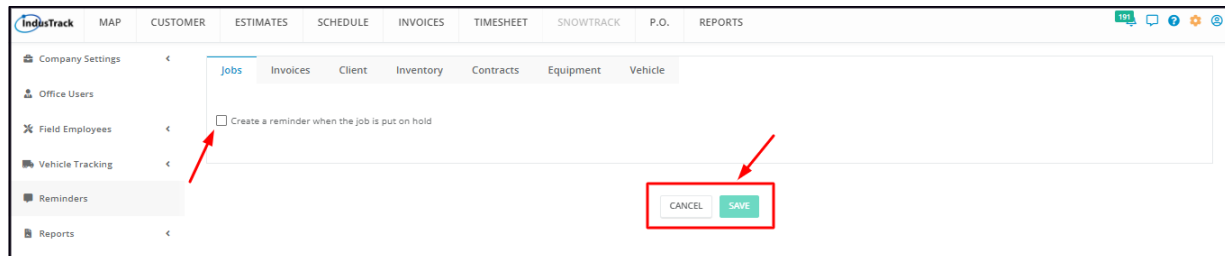

Jobs

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.
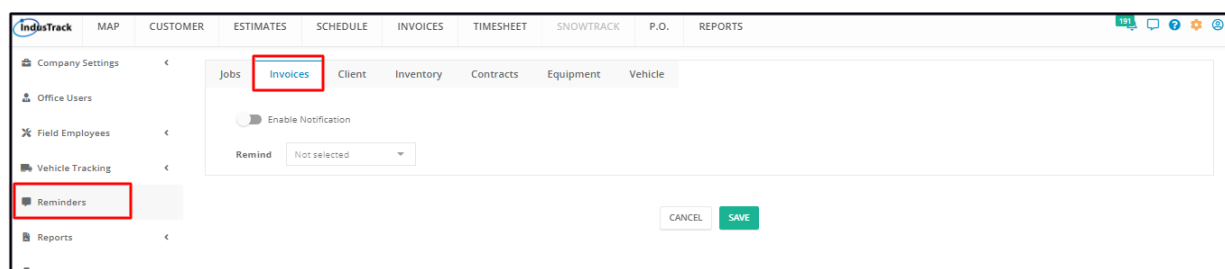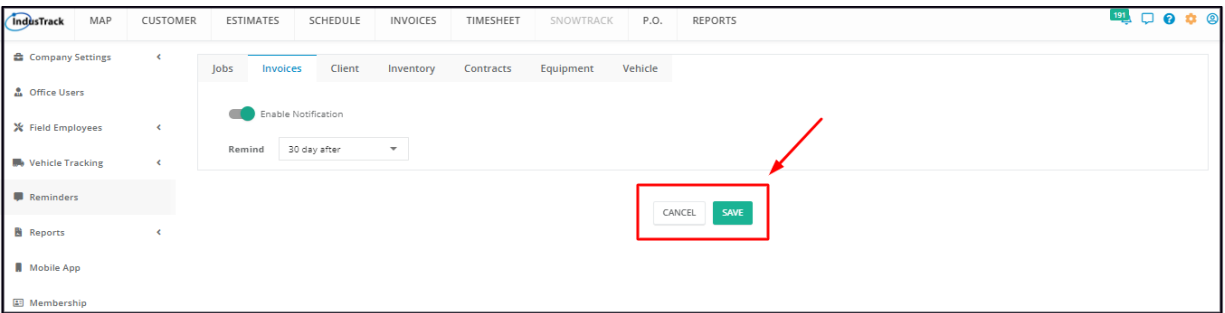

Enable the reminder by clicking the slider button to toggle the reminder to **ON** (green highlight).
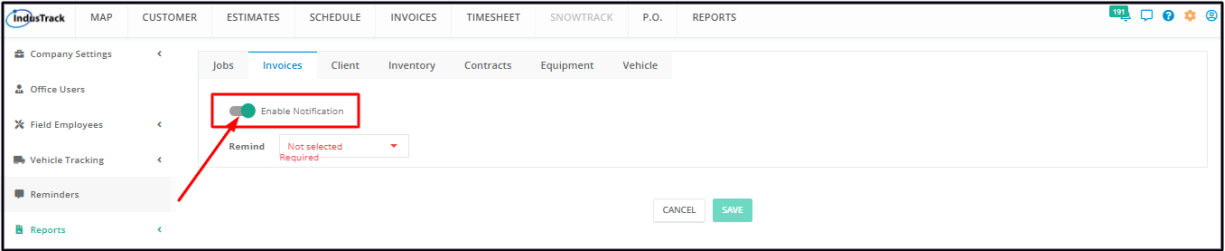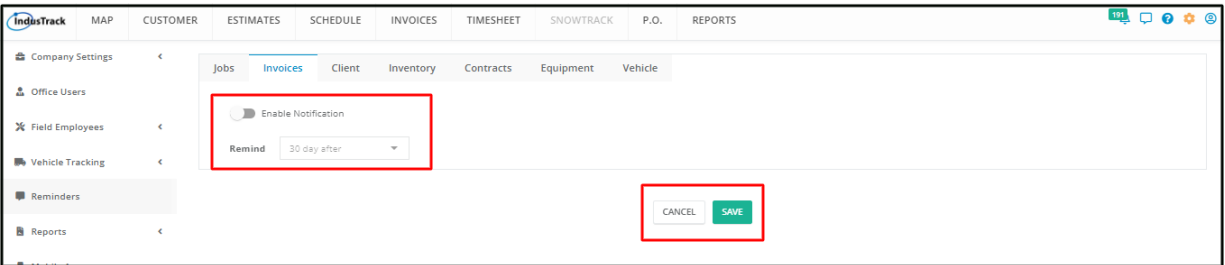
Set the 2nd condition for the reminder to send. This could either be by the due date or a specific number of days (30, 60 or 90 days) after this has passed.
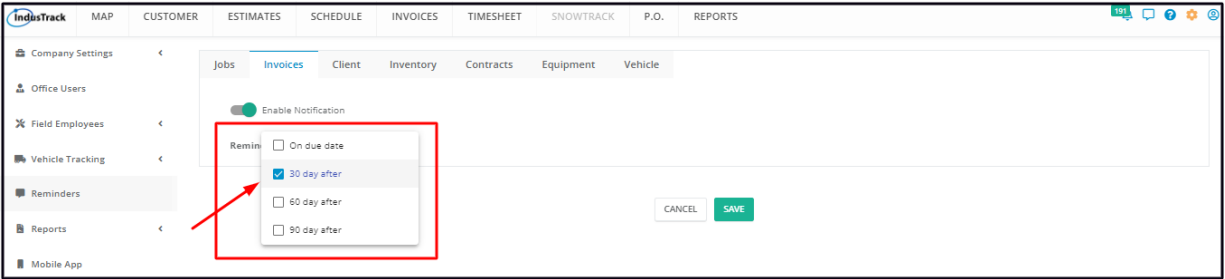
Save the reminder.

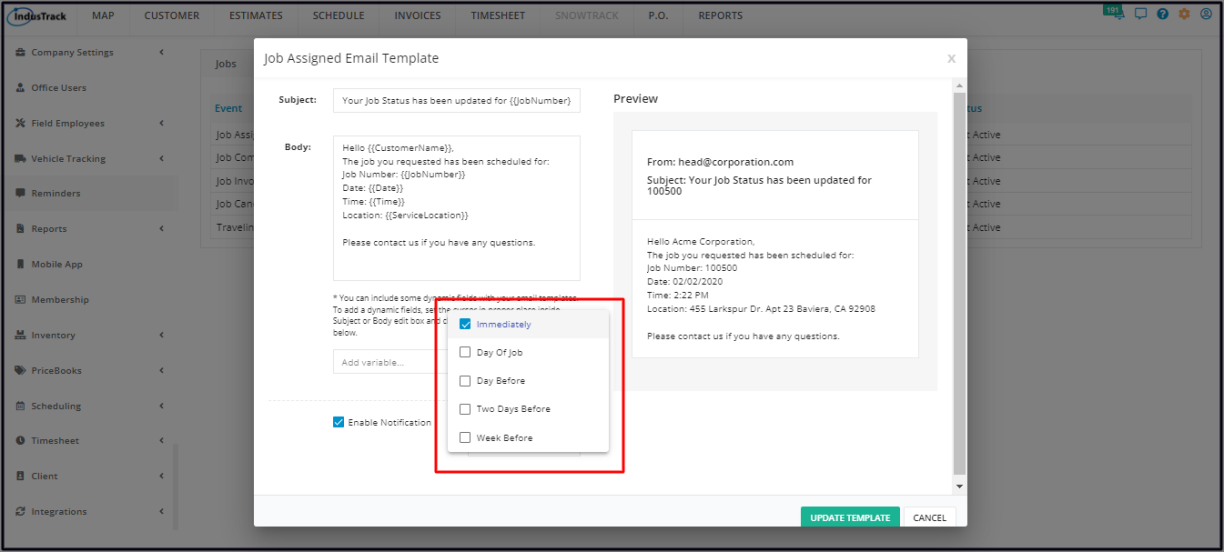To disable it, click the slider button to toggle the reminder to **OFF** (grey highlight) and Save.
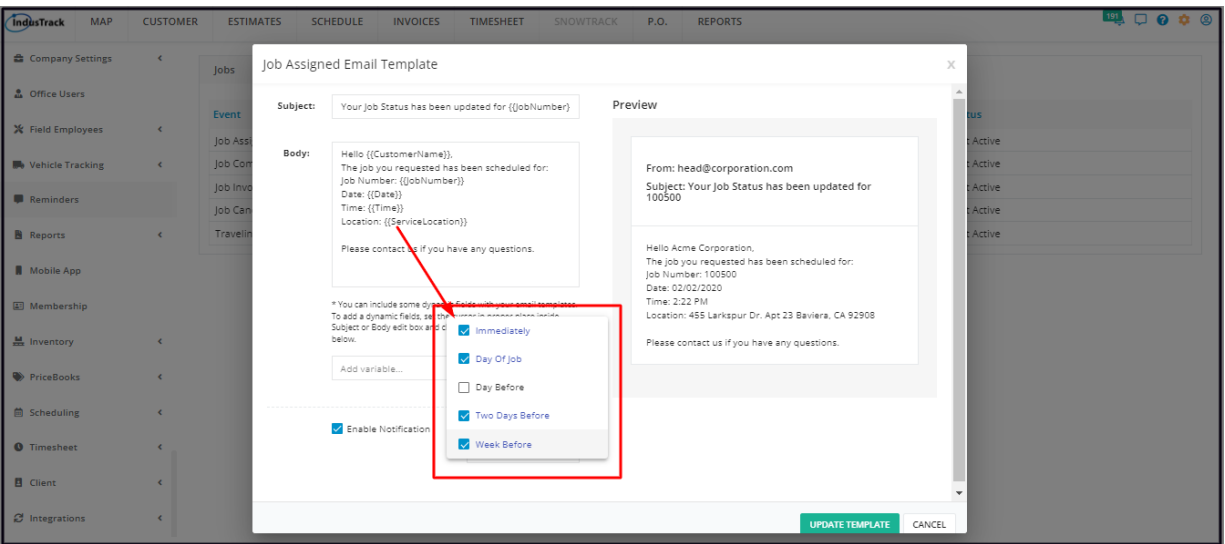

Client

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

Job Assigned
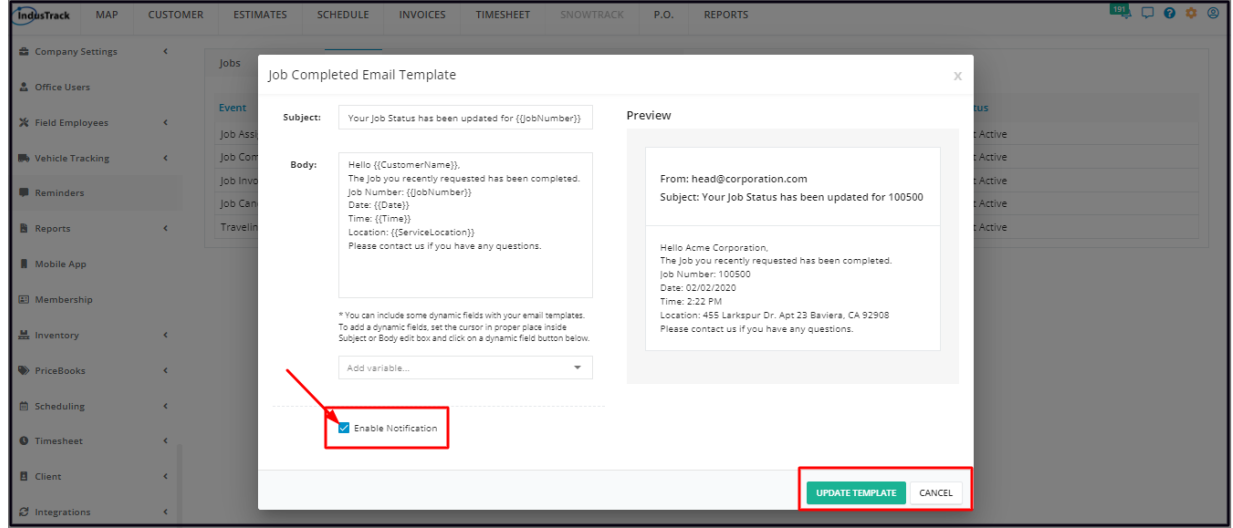
This email reminder/notification is sent to the customer when the job requested/contracted has been scheduled. The notification includes the customer name, job number, scheduled date and time, and location.

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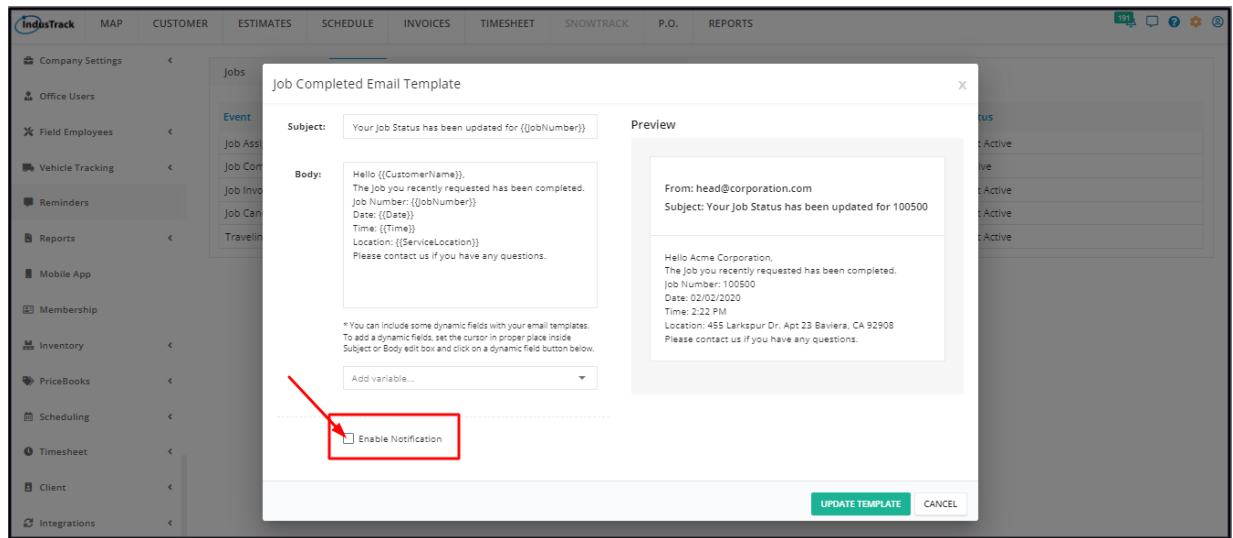

To **enable the reminder**, open the Job Assigned Email Template. Click on the checkbox of **Enable Notification**.

Select when the Reminder will be sent from the drop-down menu of "**Remind**". Choices are Immediately, Day of Job, Day Before, Two Days Before, and Week Before. The point of reference for Immediately is when the job status is updated to "Scheduled". For the rest of the choices, the point of reference is the actual scheduled date.

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.

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

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.

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.

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.

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.

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.

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.

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

Job Canceled

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

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.

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.

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.

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.

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.

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

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.

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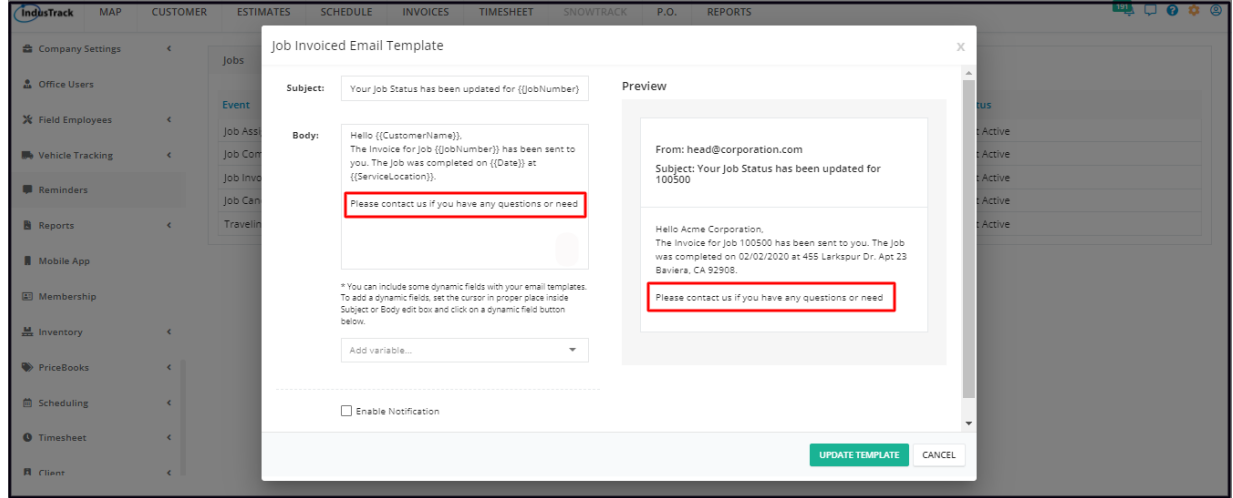
To add **dynamic fields**, set the cursor in the proper place inside the Subject or Body edit box and select a dynamic field from the *Add Variable* drop-down list. Be careful not to edit/change any letter or character of the dynamic fields as these will not work.
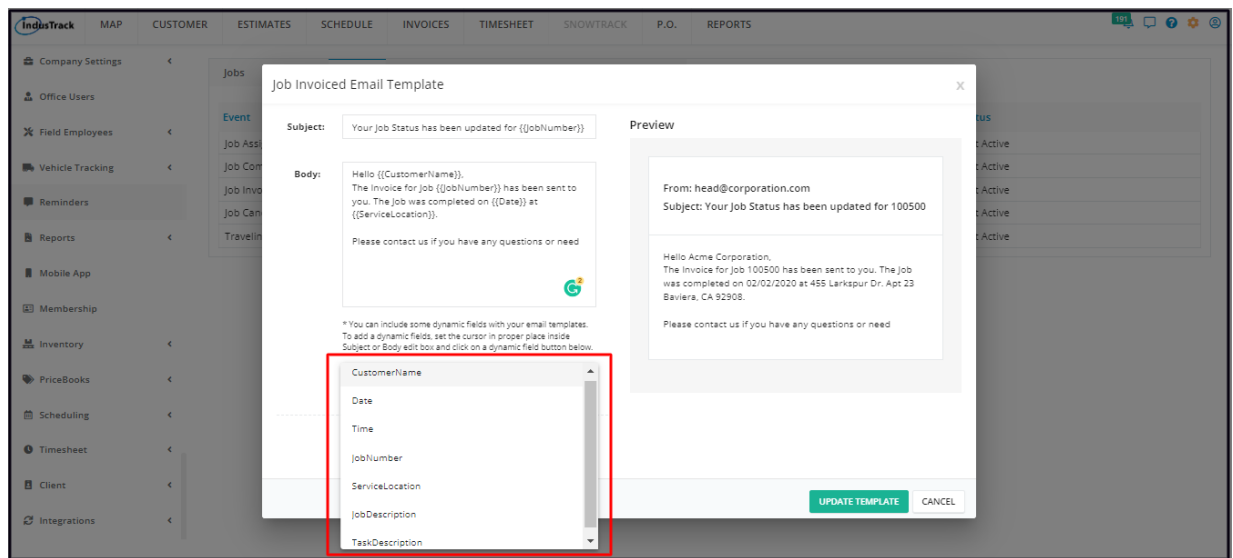
Once done, **Update the Template**.

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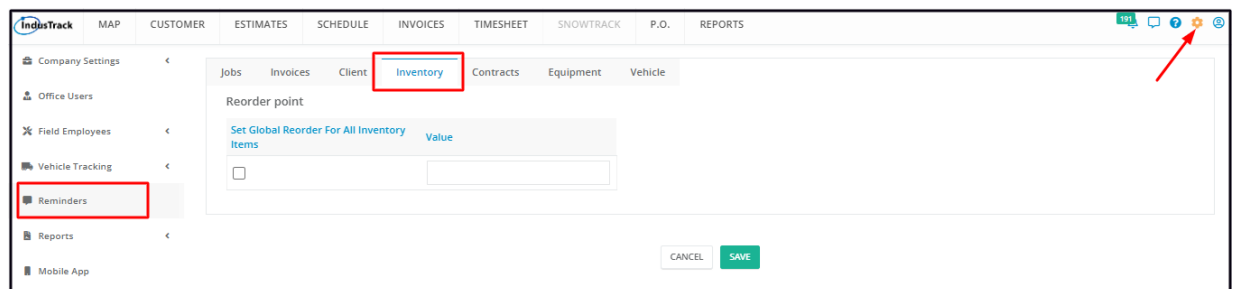
Tick the checkbox of the settings field in order to enable Global Reorder.

Key in the Reorder level on the Value field.

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.

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

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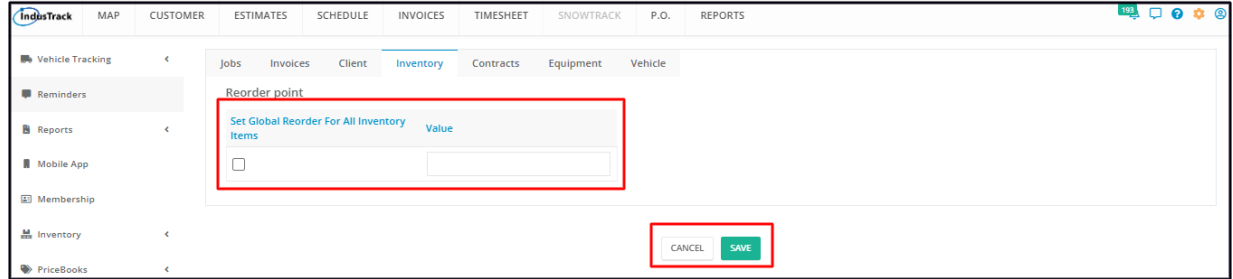
Contracts

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.
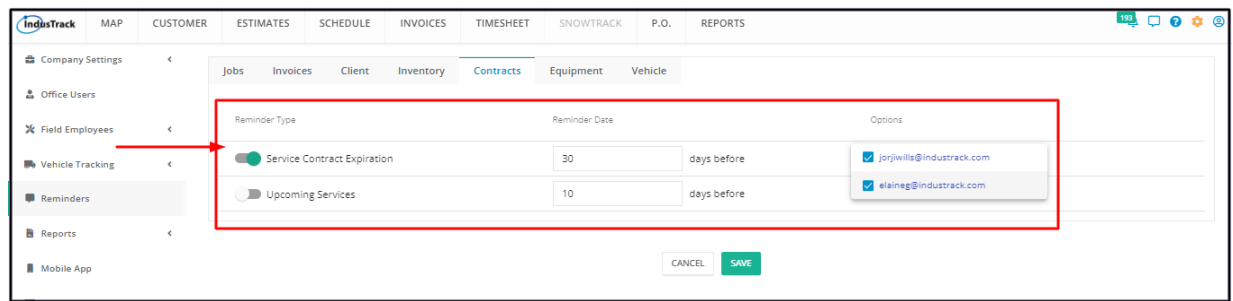
Save the reminder.

To **edit** the reminder – change the frequency or add/remove notification recipients – go to the setting, do the changes and Save.
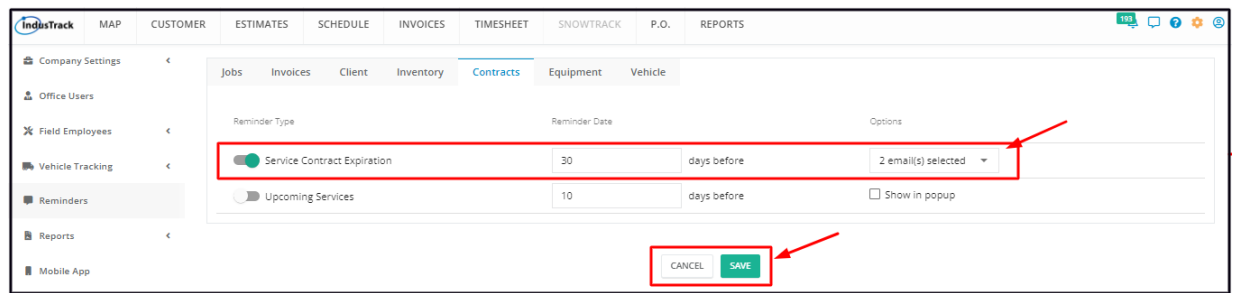
To disable the reminder, click the slider button to toggle it to **OFF** (grey highlight) and Save.
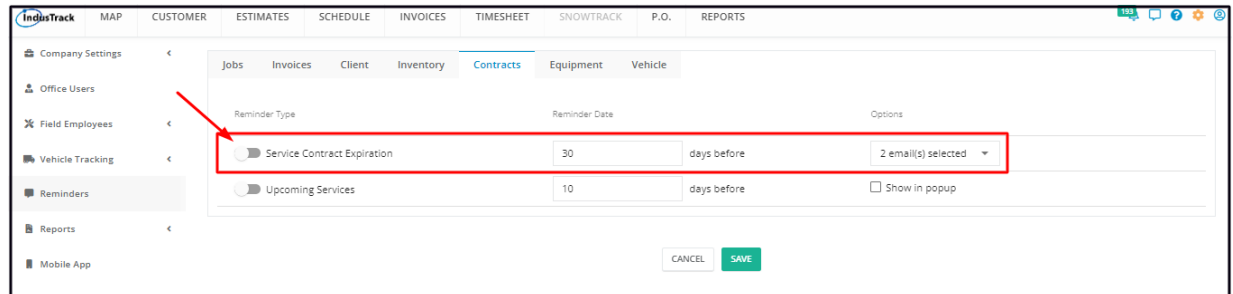
Upcoming Services

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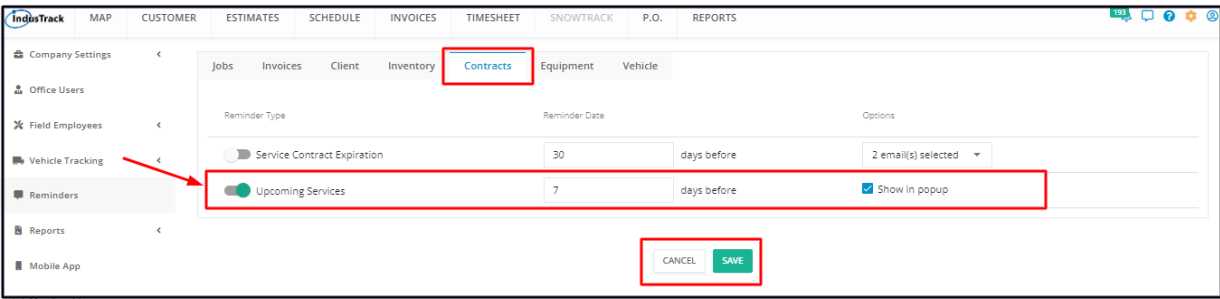
To **edit** the reminder go to the setting, do the changes and Save.
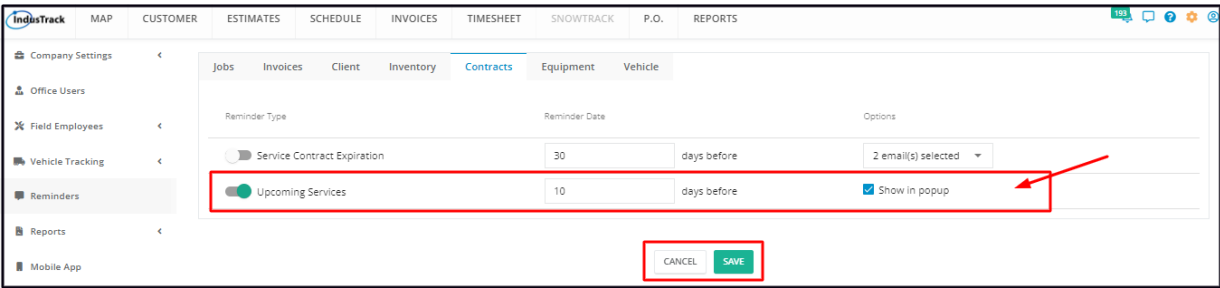
To disable the reminder, click the slider button to toggle it to **OFF** (grey highlight) and Save.

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.

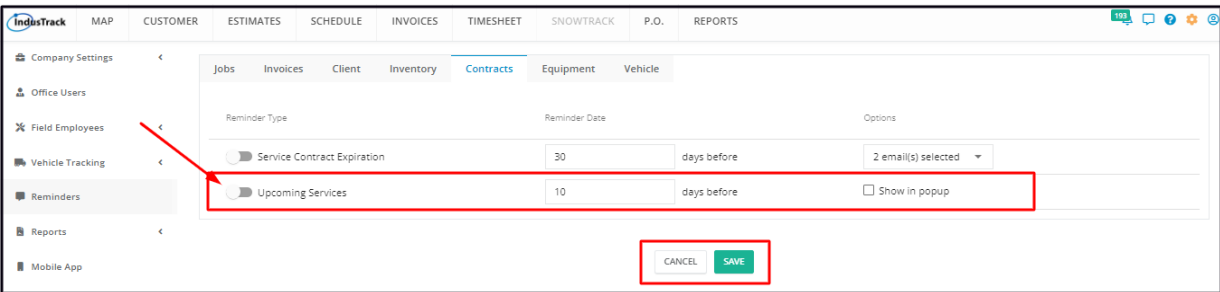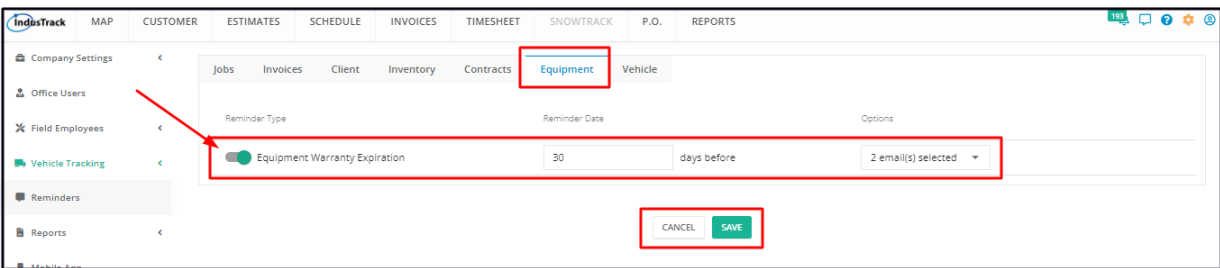Save the reminder. If the customer has multiple equipments, the reminders will be sent based on the individual warranty expiration.

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

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

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

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

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.

Disable the Reminder

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