# **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.

IndusTrack MAP	CUSTOMER	ESTIMATES SCHEDU	LE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	191_ 🖵	8 <b>9</b> 8
🚔 Company Settings	۰	Jobs Invoices Clie	nt Inventory	Contracts	Equipment	Vehicle			/
Office Users								· · · ·	
💥 Field Employees	¢	Create a reminder when the	ob is put on hold						
Kehicle Tracking	<								
Reminders						CANCE	TEL SAVE		
Reports	<								
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#### 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.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	191	0 🗘	•	9
Company S	Settings	< T	Jobs Invoices	Client	Inventory	Contracts	Equipment	Vehicle					
🚨 Office Use	rs												
🗶 Field Empl	oyees	· -	✓ Create a reminder	when the job is	put on hold								
👼 Vehicle Tra	acking												
Reminders	5							CA	INCEL SAVE				
Reports		۲											

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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS 🖳 🖓 😧 🛊 🤅
🚔 Company Settings	٢	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle	
Office Users								
💥 Field Employees	¢	Create a reminde	r when the job is	put on hold				1
🋤 Vehicle Tracking	· · /	<u> </u>						
Reminders							CA	CANCEL SAVE
Reports	٢							

## 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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	191 <u>4</u> 🖵 😮 🌼 🙁
Company Settings	٢	Jobs Invoice	es Client	Inventory	Contracts	Equipment	Vehicle		
Office Users									
🗙 Field Employees	¢	Enable	Notification						
R Vehicle Tracking	¢	Remind N	lot selected	Ŧ					
Reminders								_	
Reports	۰.						CAN	ICEL SAVE	
Mobile App									

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

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS 🛄 🖵 🙆 🌞 🛞
Company	Settings	٢	Jobs Invoice	es Client	Inventory	Contracts	Equipment	Vehicle	
🚨 Office Use	rs			_					
🎇 Field Empl	oyees	٢	4	Notification					
🋤 Vehicle Tra	acking	¢	Remind N Req	ot selected juired	•				
Reminder	5	/						CAL	ANCEL SAVE
Reports		¢							

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.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	D (	0	<b>\$</b> (2)
🚔 Company Set	ttings	٠	Jobs Invoices	Client	Inventory	Contracts	Equipment	Vehicle				
Office Users												
🎇 Field Employe	/ees	¢	Enable N									
🛤 Vehicle Track	king	<	Remin 🗌 On									
Reminders			1	day after day after								
Reports				day after				CA	SAVE SAVE			
Mobile App			L									

#### Save the reminder.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	191 🗘 🗘 🔅 🔅
Company Settings	٠	Jobs Invoices	Client	Inventory	Contracts	Equipment	Vehicle		
🎄 Office Users									
💥 Field Employees	<	Enable N	otification					/	
R Vehicle Tracking	<	Remind 30	day after	*					
Reminders									
Reports	<						CA	NCEL SAVE	
Mobile App									
E Membership									

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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	O. REPORTS 🛄 🖵 🖸 🌣	9
🚔 Company Settings	¢	Jobs Invoices	s Client	Inventory	Contracts	Equipment	Vehicle	e	
Office Users			_						
🗶 Field Employees	•	Enable No	otification						
🛤 Vehicle Tracking	¢	Remind 30	) day after	*					
Reminders								CANCEL SAVE	
Reports	٢							CANCEL 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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		19 <mark>1</mark> 🗅 🕄	) <b>\$</b> (2
🚔 Company Settings	٢	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle				
🚨 Office Users											_
		Event			Email Subject			Email Body	Status		
X Field Employees	¢	Job Assigned			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The j	ob you requested h Not Active		
Rev Vehicle Tracking	<	Job Completed			Your Job Status	has been updated	for {(JobNur	nbe Hello {{CustomerName}}, The J	ob you recently req Not Active		
Reminders		Job Invoiced			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The I	nvoice for Job {{Job Not Active		
Reminders		Job Canceled			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The J	ob you recently req Not Active		
Reports	<	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The t	echnician is on his Active		
Mobile App											
Membership							CA	NCEL SAVE			

## **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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🎫 🗅 😧 🏟
Company Settings	٢	Jobs Invoices	s Client	Inventory	Contracts	Equipment	Vehicle			
Office Users										
M		Event			Email Subject			Email Body	Status	
✗ Field Employees	<	Job Assigned			Your Job Status	has been updated	for {{JobNumb	e Hello {{CustomerName}}, The job you reque	ested h Not Active	
Vehicle Tracking	<	Job Completed			Your Job Status	has been updated	for {{JobNumb	e Hello {{CustomerName}}, The Job you recer	ntly req Not Active	
Reminders		Job Invoiced			Your Job Status	has been updated	for {{JobNumb	e Hello {{CustomerName}}, The Invoice for Jo	b {{Job Not Active	
Keminders		Job Canceled			Your Job Status	has been updated	for {{JobNumb	e Hello {{CustomerName}}, The Job you recer	ntly req Not Active	
Reports	<	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The technician is	on his Active	

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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			191_ 💭	<b>0 🌼</b> (8
🖀 Company Settings	<	Jobs Invoices	s Client	Inventory	Contracts	Equipment	Vehicle			1		
🍰 Office Users												
		Event			Email Subject			Email Body	Status	×		
💥 Field Employees	<	Job Assigned			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The job you	requested h Not Active			
🛤 Vehicle Tracking	<	Job Completed			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The Job you	recently req Not Active			
Reminders		Job Invoiced			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The Invoice	for Job {{Job Not Active			
Reminders		Job Canceled			Your Job Status	has been updated	for {(JobNun	nbe Hello {{CustomerName}}, The Job you	recently req Not Active			
Reports	<	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The technici	ian is on his Not Active			

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

IndusTrack MAP	CUSTOMER	R ESTIMATES S	CHEDULE INVOICES TIMESHEET SNOW	TRACK P.O. REPORTS	1911 🗘 🗘 🏟 🕲
🖀 Company Settings	<	Jobs Job Assig	ned Email Template	x	
🚨 Office Users		Subject:	Your Job Status has been updated for {{JobNumber}	Preview	
🗙 Field Employees	¢	Job Assi		t Activ	ve
🛤 Vehicle Tracking	<	Job Corr	Hello {{CustomerName}}, The job you requested has been scheduled for: job Number: {{jobNumber}}	From: head@corporation.com t Acti	
Reminders		Job Invo	Job Number: {jobNumber}} Date: {{Date}} Time: {{Time}}	Subject: Your Job Status has been updated for t Acti 100500 t Acti	
Reports	<	Travelin	Location: {{ServiceLocation}}	t Activ	
Mobile App			Please contact us if you have any questions.	Hello Acme Corporation, The job you requested has been scheduled for: job Number: 100500 Dere: 02/02/2020	
Membership			You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button	Date: 12/12/2020 Time: 2:22 PM Location: 455 Larkspur Dr. Apt 23 Baviera, CA 92908	
inventory	<		below.	Please contact us if you have any questions.	
PriceBooks	¢		Add variable 💌		
🛱 Scheduling	¢		Enable Notification Remind		
O Timesheet	¢		Immediately 🔻		
Client	<			-	
$\mathcal Q$ Integrations	¢			UPDATE TEMPLATE CANCEL	

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.

	< Jobs					
		Job Assign	ed Email Template			x
A Office Users	Even	Subject:	Your Job Status has be	en updated for {(JobNumber)	Preview	tus
🗙 Field Employees	< Job A					: Active
Kehicle Tracking	< Job C	Body:	Hello {{CustomerName The job you requested Job Number: {{JobNum	has been scheduled for:	From: head@corporation.com	: Active
Reminders	Job I		Date: {{Date}} Time: {{Time}}	iowr yy	Subject: Your Job Status has been updated for 100500	t Active
Reports	< Trav		Location: {{ServiceLoca		Hello Acme Corporation.	: Active
📕 Mobile App			Please contact us if yo	u have any questions.	Hello Acme Corporation, The job you requested has been scheduled for: Job Number: 100500 Date: 02/02/2020	
Membership			Subject or Body edit box and	nis felds with your email completes the current in account along incide C Immediately	Time: 2:22 PM Location: 455 Larkspur Dr. Apt 23 Baviera, CA 92908	
🗮 Inventory	<		below.	Day Of Job	Please contact us if you have any questions.	
PriceBooks	<		Add variable	Day Before		
🛱 Scheduling	<		Enable Notification	Two Days Before		
C Timesheet	۲.			Week Before		
E Client	<		L			•
₿ Integrations	<				UPDATE TEMPLATE	CANCEL

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.

IndusTrack MAP	CUSTOMER	ESTIMATES S	CHEDULE INVOICES TIM	MESHEET SNOWT	TRACK P.O. REPORTS			111 🖓 💭 😯 🏟 🙁
Company Settings	۲.	Jobs Job Assig	ned Email Template				×	
Office Users		Subject:	Your Job Status has been updated	d for {{JobNumber}	Preview		tus	
💥 Field Employees	<	Job Assi Body:	Hello {{CustomerName}},				: Active	
R Vehicle Tracking	¢	Job Con	The job you requested has been : Job Number: {[JobNumber]}	scheduled for:	From: head@corporation.		t Active	
Reminders		Job Invo	Date: {{Date}} Time: {{Time}}		Subject: Your Job Status hi 100500	as been updated for	t Active t Active	
Reports	¢	Travelin	Location: {{ServiceLocation}} Please contact is if you have any		Hello Acme Corporation.		: Active	
📕 Mobile App			Please contact up if you have any	y questions.	The job you requested has be Job Number: 100500	een scheduled for:		
Membership			* You can include some dynamic Foldowi To add a dynamic fields, se the susception Subject or Body edit box and d	ith your email templates.	Date: 02/02/2020 Time: 2:22 PM Location: 455 Larkspur Dr. Ap	pt 23 Baviera, CA 92908		
H Inventory	<		below.	ay Of Job	Please contact us if you have	any questions.		
PriceBooks	<		Add variable	ay Before				
Scheduling	<		Enable Notification	vo Days Before				
Timesheet	۲.			leek Before				
Client	¢						•	
${\cal S}$ Integrations	¢					UPDATE TEMPLATE CANCEL		

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

IndusTrack MAP	CUSTOMER	ESTIM/	ATES SC	HEDULE INVOICES TIMESHEET SNOW	TRACK P.O. REPORTS	🏨 🖵 🛛 🌞 🕲
Company Settings	<	Jobs	Job Assign	ed Email Template		x
Office Users		Event	Subject:	Your Job Status has been updated for {{JobNumber}	Preview	
🗙 Field Employees	<	Job Assi,				t Active
K Vehicle Tracking	<	Job Com	Body:	Hello {{CustomerName}}, The job you requested has been scheduled for: Job Number: {{JobNumber}}	From: head@corporation.com	: Active
Reminders		Job Invo Job Can		Date: {{Date}} Time: {{Time}} Location: {{ServiceLocation}}	Subject: Your Job Status has been updated for 100500	: Active
Reports	<	Travelin		Please contact us if you have any questions.	Hello Acme Corporation,	: Active
Mobile App					The job you requested has been scheduled for: Job Number: 100500 Date: 02/02/2020	
Membership				* You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button	Time: 2:22 PM Location: 455 Larkspur Dr. Apt 23 Baviera, CA 92908	
M Inventory	<			below.	Please contact us if you have any questions.	
PriceBooks	<			Add variable 🔻		
🗎 Scheduling	٢			Enable Notification Remind		
0 Timesheet	<			Immediately, Da 🔻	X	
E Client	۲.					•
Ø Integrations	<		_		UPDATE TEMPLATE CA	ANCEL

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🎫 🗘 🗘 🏟
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🍰 Office Use	ers										
🂥 Field Emp	lavaas	,	Event			Email Subject			Email Body	Status	
A Field citip	loyees		Job Assigned			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The job y	ou requested h Active	
🫤 Vehicle Tr	acking	<	Job Completed			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The Job y	ou recently req Not Active	
Reminder	-		Job Invoiced			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The Invoi	ce for Job {{Job Not Active	
- Kenninger	2		Job Canceled			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The Job y	ou recently req Not Active	
Reports		•	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The techr	nician is on his Not Active	

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

IndusTrack MAP	CUSTOMER	ESTIMATES SC	THEDULE INVOICES TIMESHEET SNOWTH	RACK P.O. REPORTS	🏨 🗘 🔕 🎄
🖀 Company Settings	<	Jobs Job Assign	ned Email Template		x
â Office Users		Subject:	Your Job Status has been updated for {{JobNumber}	Preview	A US
X Field Employees	*	Job Assi Body:	Hello ((CustomerName)),		ive
R Vehicle Tracking	<	Job Com	The job you requested has been scheduled for: Job Number: {{JobNumber}}	From: head@corporation.com Subject: Your Job Status has been updated for	: Active
Reminders		Job Can	Date: {{Date}} Time: {{Time}}	100500	t Active
Reports	<	Travelin	Location: {{ServiceLocation}} Please contact us if you have any questions.	Hello Acme Corporation,	t Active
Mobile App				The job you requested has been scheduled for: Job Number: 100500 Date: 02/02/2020	
🔠 Membership			* You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside	Time: 2:22 PM Location: 455 Larkspur Dr. Apt 23 Baviera, CA 92908	
🗮 Inventory	<		Subject or Body edit box and click on a dynamic field button below.	Please contact us if you have any questions.	
PriceBooks	<		Add variable 👻		
Scheduling	<				
O Timesheet	<	Ļ	Enable Notification Remind Immediately, Da		
E Client	¢	· ·			
2 Integrations	<			UPDATE TEMPLATE	CANCEL

## **Job Completed**

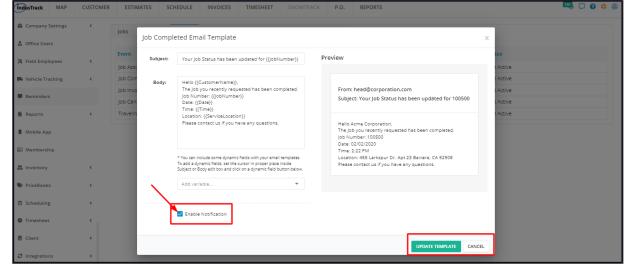
This email reminder/notification is sent to the customer when the job requested/contracted status has been updated to Completed. The notification includes the customer name, job number, date and time of completion, and location.

IndusTrack	MAP C	USTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🕮 🗘 🕄	• • •
🖀 Company Sett	tings	۲.	Jobs Invoice	es Client	Inventory	Contracts	Equipment	Vehicle				
Office Users												
			Event			Email Subject			Email Body	Status		
💥 Field Employe	es	<	Job Assigned			Your Job Status	has been updated f	or {{JobNum	nbe Hello {{CustomerName}}, The job you request	ed h Not Active		
🛤 Vehicle Tracki	ing	<	Job Completed			Your Job Status	has been updated f	or {{JobNum	be Hello {{CustomerName}}, The Job you recently	req Not Active		
-			Job Invoiced			Your Job Status	has been updated f	or {{JobNum	be Hello {{CustomerName}}, The Invoice for Job {	Job Not Active		
Reminders			Job Canceled			Your Job Status	has been updated f	or {{JobNum	be Hello {{CustomerName}}, The Job you recently	req Not Active		
Reports		<	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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		백 🖓 🗘 🤹
🖀 Company Settings	¢	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle			
Office Users										
💥 Field Employees	¢	Event			Email Subject			Email Body	Status	
	4	Job Assigned Job Completed						be Hello {{CustomerName}}, The job you requested be Hello {{CustomerName}}, The Job you recently		
Kehicle Tracking	¢	Job Completed						pe Hello {{CustomerName}}, The Job you recently		
Reminders		Job Canceled						e Hello {{CustomerName}}, The Job you recently		
Reports	<	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The technician is on I	nis 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.



IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		191_ 🖓 🖓	•
Company Settings	۲.	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle				
Office Users											
		Event			Email Subject			Email Body	Status	/	
✗ Field Employees	<	Job Assigned			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The job you re	quested h Not Active		
🛤 Vehicle Tracking	<	Job Completed			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The Job you re	cently req Active		
_		Job Invoiced			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The Invoice for	Job {{Job Not Active		
Reminders		Job Canceled			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The Job you re	cently req Not Active		
Reports	<	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 SC	HEDULE INVOICES TIMESHEET SNOWT	RACK P.O. REPORTS	🖳 🖵 🛛 🍁 🕲
Company Settings	¢	Jobs Job Comp	leted Email Template		X
🗙 Field Employees	¢	Job Assi	Your Job Status has been updated for {{JobNumber}}	Preview	t Active
Vehicle Tracking	¢	Job Com Job Invo	Helio {{CustomerName}}, The Job you recently requested has been completed.	From: head@corporation.com	ve : Active
Reminders		Job Can	Job Number: {{JobNumber}} Date: {{Date}} Time: {{Time}}	Subject: Your Job Status has been updated for 100500	: Active
Reports	۲.	Travelin	Location: {{ServiceLocation}} Please contact us if you have any questions.	Hello Acme Corporation,	: Active
Mobile App				The Job you recently requested has been completed. Job Number: 100500 Date: 02/02/2020	
Membership			* You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside	Time: 2:22 PM Location: 455 Larkspur Dr. Apt 23 Baviera, CA 92908 Please contact us if you have any questions.	
<ul> <li>Inventory</li> <li>PriceBooks</li> </ul>	¢		Subject or Body edit box and click on a dynamic field button below.		
Scheduling	,				
G Timesheet	č		Enable Notification		
Client					
C Integrations	4			UPDATE TEMPLATE CANC	EL

#### 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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		º1 🖓 🗘 🖓
🔹 Company Settings	٢	Jobs Invoices	s Client	Inventory	Contracts	Equipment	Vehicle			
🚨 Office Users										
M		Event			Email Subject			Email Body	Status	
🎉 Field Employees	<	Job Assigned			Your Job Status	has been updated	for {{JobNun	be Hello {{CustomerName}}, The job you reque	sted h Not Active	
🛤 Vehicle Tracking	<	Job Completed			Your Job Status	has been updated	for {{JobNun	be Hello {{CustomerName}}, The Job you recent	ly req Not Active	
Reminders		Job Invoiced			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The Invoice for Job	{Job Not Active	
Reminders		Job Canceled			Your Job Status	has been updated	for {{JobNun	nbe Hello {{CustomerName}}, The Job you recent	ly req Not Active	
Reports	<	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The technician is o	n his Not Active	
Mobile App										

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.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			🎫 🗘 🗘 🌼 🕲
🖀 Company	Settings	¢	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle				
🚨 Office Use	rs										/	
			Event			Email Subject			Email Body	Status		
🄀 Field Empl	loyees	<	Job Assigned			Your Job Status	has been updated fo	or {{JobNun	nbe Hello {{CustomerName}}, The job you reque	sted h Not Active		
🛤 Vehicle Tr	acking	<	Job Completed			Your Job Status	has been updated fo	or {{JobNun	nbe Hello {{CustomerName}}, The Job you recen	ly req Not Active	¥	
Reminder			Job Invoiced			Your Job Status	has been updated fo	or {{JobNun	nbe Hello {{CustomerName}}, The Invoice for Job	{[]ob Not Active		
Keminder.	2		Job Canceled			Your Job Status	has been updated fo	or {{JobNun	nbe Hello {{CustomerName}}, The Job you recen	tly req Not Active		
Reports		٠.	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The technician is o	n 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 SCI	HEDULE INVOICES	TIMESHEET	SNOWTRACI	< P.O.	REPORTS	<sup>191</sup> , 🗘	0 🌣 🗵
🖀 Company Settings	; <	lobs						_	
Office Users		Job Invoice	ed Email Template					х	
💥 Field Employees	۲	Event Subject:	Your Job Status has bee	n updated for {{jo	bNumber}}	Preview		tus t Active	
📕 Vehicle Tracking	<	Job Com Body:	Hello {{CustomerName}	}.				: Active	
Reminders		Job Invo	The Invoice for Job ((Job you. The Job was comple {{ServiceLocation}}.	Number}} has be			n: head@corporation.com ect: Your Job Status has been updated for 10	t Active	
Reports	<	Travelin	Please contact us if you	have any questio	ns.			t Active	
Mobile App						The	) Acme Corporation, invoice for Job 100500 has been sent to you. The Ji completed on 02/02/2020 at 455 Larkspur Dr. Apt		
Membership			* You can include some dynam				era, CA 92908. se contact us if you have any questions.		
🚆 Inventory	٢		To add a dynamic fields, set th Subject or Body edit box and c	e cursor in proper pl	ace inside				
PriceBooks	<		Add variable		*				
Scheduling	٢			1					
O Timesheet	۲.	L	Enable Notification	J					
Client	¢						UPDATE TEMPLATE	CANCEL	
∂ Integrations	<					-			
IndusTrack MAP	CUSTOMER	ESTIMATES SCH	EDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	<sup>19</sup> 1, 🗅	<b>0 🌼</b> 🔇
Company Settings	٢	Jobs Invoices	Client Inventory	Contracts	Equipment	Vehicle			
Office Users									
💥 Field Employees	٢	Event Job Assigned		Email Subject Your Job Status	has been updated	for {{JobNum	Email Body be Hello {{CustomerName}}, The job you req	Status uested h Not Active	
R Vehicle Tracking	<	Job Completed		Your Job Status	has been updated	for {{JobNum	be Hello {{CustomerName}}, The Job you rec	ently req Not Active	
Reminders		Job Invoiced		Your Job Status	has been updated	for {{JobNum	be Hello {{CustomerName}}, The Invoice for	ob {{Job Active	
- Kenniders		Job Canceled		Your Job Status	has been updated	for {{JobNum	be Hello {{CustomerName}}, The Job you rec	ently req Not Active	
Reports	٢	Traveling to job		Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The technician i	s on his Not Active	

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

IndusTrack MAP	CUSTOMER	ESTIMATES S	CHEDULE INVOICES	TIMESHEET SNOW	RACK P.O. REPORTS	<sup>131</sup> , 🖓 🗘 🔅 🕲
Company Settings Company Settings Confice Users Field Employees	¢	Jobs Job Invoid Event Job Assi	ed Email Template	pdated for {[]obNumber}}	X Preview	s
Vehicle Tracking Reminders Reports Mobile App	¢	Job Con Job Invo Job Can Travelin	Helio ((CustomerName)). The Invoice for Job ((JobNur you. The Job was completed ((ServiceLocation)). Please contact us if you hav	d on {{Date}} at	From: head@corporation.com Subject: Your Job Status has been updated for 100500 7 A Helio Acme Corporation. The Imvisite for Job 100500 has been sent to you. The Job was completed on 0202/2020 at 455 Larkspur Dr. Apt 23	ctive
<ul> <li>Membership</li> <li>Inventory</li> <li>PriceBooks</li> </ul>	¢		* You can include some dynamic fi To add a dynamic fields, set the cur Subject or Body edit box and click o Add variable	rsor in proper place inside	Baviera, CA 92908. Please contact us if you have any questions.	
Scheduling	¢	[	Enable Notification			
Client	c c				UPDATE TEMPLATE CANCEL	

#### Job Canceled

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

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🏨 🖓 🗘 🔅
🖀 Company Se	ettings	٢	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle			
🚨 Office Users	5										
🂥 Field Emplo			Event			Email Subject			Email Body	Status	
A Field Employ	yees		Job Assigned			Your Job Status I	has been updated f	or {{JobNur	nbe Hello {{CustomerName}}, The job yo	ou requested h Not Active	
🛤 Vehicle Trac	cking	<	Job Completed			Your Job Status	has been updated f	or {{JobNun	nbe Hello {{CustomerName}}, The Job yo	ou recently req Not Active	
Reminders			Job Invoiced			Your Job Status I	has been updated f	or {{JobNur	nbe Hello {{CustomerName}}, The Invoic	e for Job {{Job Not Active	
Reminders			Job Canceled			Your Job Status	has been updated f	or {{JobNun	nbe Hello {{CustomerName}}, The Job yo	ou recently req Not Active	
Reports		۰.	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The techn	ician 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.

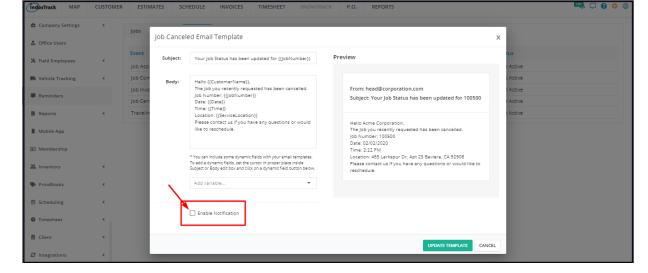
To view or update the template, click anywhere on the row. This will open the editable Job Canceled Email template. To edit/update the template, see the section **How to Update a Template** below.

IndusTrack MAP	CUSTOMER	R ESTIM.	ATES SC	HEDULE INVOICES TIMESHEET SNOWTR	ACK P.O. REPORTS	11 🖓 🖓 🕸 🕸
🖀 Company Settings	<	Jobs	lah Gan	lad Carallata		
Confice Users			Job Cance	led Email Template		x
🗙 Field Employees	<	Event Job Assi	Subject:	Your Job Status has been updated for {{JobNumber}}	Preview	tus L'Active
R Vehicle Tracking	<	Job Com	Body:	Hello {{CustomerName}},		t Active
Reminders		Job Invo Job Can		The Job you recently requested has been cancelled. Job Number: {{JobNumber}} Date: {{Date}}	From: head@corporation.com Subject: Your Job Status has been updated for 100500	t Active
Reports	¢	Travelin		Time: {{Time}} Location: {{ServiceLocation}}		t Active
📕 Mobile App				Please contact us if you have any questions or would like to reschedule.	Hello Acme Corporation, The Job you recently requested has been cancelled. Job Number: 100500	
Membership					Date: 02/02/2020 Time: 2:22 PM	
H Inventory	۲			* You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below.	Location: 455 Larkspur Dr. Apt 23 Baviera, CA 92908 Please contact us if you have any questions or would like to reschedule.	
PriceBooks	¢			Add variable 👻	· · · · · · · · · · · · · · · · · · ·	
🛱 Scheduling	<					
0 Timesheet	¢			Enable Notification		
Client	¢					
€ Integrations	<		-		UPDATE TEMPLATE CANCE	

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 SCH	IEDULE INVOICES	TIMESHEET		P.O.	REPORTS			🏨 📮 🛛 🌣 🙁
🖀 Company Settings	<	lobs							_	
â Office Users		Job Cancel	ed Email Template						x	
🗶 Field Employees	¢	Event Subject: Job Assi	Your Job Status has bee	n updated for {{]o	bNumber}}	Preview			tus t Active	
🛤 Vehicle Tracking	¢	Job Com Body:	Hello {{CustomerName	1					t Active	
Reminders		Job Invo Job Can	The Job you recently rec Job Number: {{JobNumb Date: {{Date}}	quested has been	cancelled.		m: head@corporation.co ject: Your Job Status ha	om s been updated for 100500	t Active t Active	
Reports	¢	Travelin	Time: {{Time}} Location: {{ServiceLocat						t Active	
Mobile App			Please contact us if you like to reschedule.	have any questio	ns or would	The Job 1	o Acme Corporation, Job you recently requested Number: 100500 x: 02/02/2020	I has been cancelled.		
Membership			* You can include some dynan	aic fields with your e	nail templates	Time	e: 02/02/2020 e: 2:22 PM ation: 455 Larkspur Dr. Apt	23 Baviera CA 92908		
🗮 Inventory	¢		To add a dynamic fields, set th Subject or Body edit box and c	e cursor in proper pl	ace inside	Plea		ny questions or would like to		
PriceBooks	<		Add variable		•					
🗎 Scheduling	¢									
O Timesheet	¢		Enable Notification							
Client	¢								_	
Integrations	¢		_		_		_	UPDATE TEMPLATE CAN	NCEL	
IndusTrack MAP	CUSTOMER	ESTIMATES SCH	EDULE INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			mî 🗅 \delta 💠 🕲
🚔 Company Settings	٢	Jobs Invoices	Client Inventory	Contracts	Equipment	Vehicle				
🍰 Office Users										
🔀 Field Employees	<	Event		Email Subject			Email Body		Status	
R Vehicle Tracking	<	Job Assigned Job Completed						ame}}, The job you requested ame}}, The Job you recently re		,
-		Job Invoiced						ame}}, The Invoice for Job {{Jol		
Reminders		Job Canceled						ame}}, The Job you recently re		
Reports	۰.	Traveling to job		Traveling to job	) - {{JobNumber}}		Hello {{CustomerN	ame}}, The technician is on his	s 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		🎫 🗘 🗘 🤹
Company Settings	٢	Jobs Invoices	; Client	Inventory	Contracts	Equipment	Vehicle			
🏦 Office Users										
		Event			Email Subject			Email Body	Status	
✗ Field Employees	٠	Job Assigned			Your Job Status	has been updated	for {{JobNun	ibe Hello {{CustomerName}}, The job you requeste	d h Not Active	
🛤 Vehicle Tracking	<	Job Completed			Your Job Status	has been updated	for {{JobNun	ibe Hello {{CustomerName}}, The Job you recently	req Not Active	
		Job Invoiced			Your Job Status	has been updated	for {{JobNun	ibe Hello {{CustomerName}}, The Invoice for Job {{	ob Not Active	
Reminders		Job Canceled			Your Job Status	has been updated	for {{JobNun	ibe Hello {{CustomerName}}, The Job you recently	req Not Active	
Reports	<	Traveling to job			Traveling to job	- {{JobNumber}}		Hello {{CustomerName}}, The technician is on l	nis 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			191_ 🖵 🖓	) 🔅 🤅
Company Settings	٢	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle					
Office Users												
		Event			Email Subject			Email Body	Status			
🎇 Field Employees	¢	Job Assigned			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The job you requ	ested h Not Active	1		
🛤 Vehicle Tracking	¢	Job Completed			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The Job you rece	ntly req Not Active			
-		Job Invoiced			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The Invoice for Jo	b {{Job Not Active	/		
Reminders		Job Canceled			Your Job Status	has been updated	for {{JobNur	nbe Hello {{CustomerName}}, The Job you rece	ntly req Not Active			
Reports	<	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 S	CHEDULE INVOICES TIMESHEET	SNOWTRACK P.O. REPORTS	<sup>191</sup> , 🖵 😯 🌣 🕲
Company Settings Office Users	¢	Jobs Traveling	; to job Email Template		×
X Field Employees	¢	Event Subject:	Traveling to job - {(jobNumber)}	Preview	tus : Active
Reminders	¢	Job Com Job Invo Job Can	Hello {{CustomerName}}, The technician is on his way: Job Number: {{JobNumber}} Date: {{Date}}	▲ From: head@corporation.com Subject: Traveling to job - 100500	: Active : Active : Active
<ul> <li>Reports</li> <li>Mobile App</li> </ul>	¢	Travelin	Time: {{Time}} Location: {{ServiceLocation}} ETA: {{ETA} Thank you for using our services and we look	Hello Acme Carporation, The technician is on his way: Job Number 105500	: Active
Membership     Mentory	٢		forward to serving you!. * You can include some dynamic fields with your email tem To add a dynamic fields, set the cursor in proper place insi Subject or Body edit box and click on a dynamic field butto	de ETA: 02/02/2020 3:33 PM	
PriceBooks	¢	<b>`</b>	Add variable	Thank you for using our services and we look forward to serving you!.	
<ul> <li>Scheduling</li> <li>Timesheet</li> </ul>	¢		Z Enable Notification		
Client	¢			UPDATE TEMPLATE CAN	CEL
₿ Integrations	¢				

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		191	0	\$ @
🖀 Company S	settings	۲	Jobs Invoice	Client	Inventory	Contracts	Equipment	Vehicle					
🚨 Office User	s												
X Field Emplo			Event			Email Subject			Email Body	Status			
A Field Emplo	oyees		Job Assigned			Your Job Status	has been updated i	for {{JobNun	nbe Hello {{CustomerName}}, The job you requested h	Not Active			
🛤 Vehicle Tra	cking	٠.	Job Completed			Your Job Status	has been updated i	for {{JobNun	nbe Hello {{CustomerName}}, The Job you recently req.	Not Active			
Reminders			Job Invoiced			Your Job Status	has been updated i	for {{JobNun	be Hello {{CustomerName}}, The Invoice for Job {{Job.	Not Active			
Keminders			Job Canceled			Your Job Status	has been updated i	for {{JobNun	be Hello {{CustomerName}}, The Job you recently req.	Not Active			
Reports		٠.	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 S	CHEDULE INVOICES TIMESHEET SNOV	VTRACK P.O. REPORTS	<sup>111</sup> , 🖵 😗 🌻 🕲
🚔 Company Settings	¢	Jobs Traveling	to job Email Template		x
♣ Office Users ★ Field Employees	K	Event Subject:	Traveling to job - {[]obNumber]}	Preview	tus t Active
Vehicle Tracking     Reminders	¢	Job Com Job Invo	Hello {{CustomerName}}, The technician is on his way; Job Number; {{JobNumber}}	From: head@corporation.com	: Active
Reports	ĸ	Job Can Travelin	Date: {{Date}} Time: {{Time}} Location: {{ServiceLocation}}	Subject: Traveling to job - 100500	: Active
Mobile App			ETA: {{ETA}} Thank you for using our services and we look forward to serving you!.	Hello Acme Corporation, The technician is on his way: Job Number: 100500 Date: 02/02/020	
Membership Inventory	<		* You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below	ETA: 02/02/2020 3:33 PM	
PriceBooks	¢		Add variable 👻	Thank you for using our services and we look forward to serving you!.	
🗑 Scheduling	<		Enable Notification		
Client	,	l			
☑ Client	¢.			UPDATE TEMPLATE CAN	CEL

## 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	R ESTIMA	TES SCH	IEDULE INVOICES TIMESHEET SNOWTH	ACK P.O. REPORTS	191 <b>)</b> 🗘 🗘 🔅 🕲
<ul> <li>Company Settings</li> <li>Office Users</li> </ul>	۲.	Jobs	Job Invoice	d Email Template		×
💥 Field Employees	¢	Job Assi	Subject:	Your Job Status has been updated for {{JobNumber}}	Preview	t Active
Vehicle Tracking     Reminders	<	Job Com Job Invo Job Can	Body:	Hello {{CustomerName}}, The Invoice for Job {{JobNumber}} has been sent to you. The job was completed on {{Date}} at {{CerriceLocation}}. Please contact us if you have any questions.	From: head@corporation.com Subject: Your Job Status has been updated for 100500	: Active : Active : Active
<ul> <li>Reports</li> <li>Mobile App</li> </ul>	K	Travelin		Prese contact ds in you have any questions.	Hello Acthe Corporation, The Invoice for job 100800 has been sent to you. The job was completed on 02/02/020 at 455 Larkspur Dr. Apt 23 Baviera, CA 92908.	: Active
Membership Inventory	¢			You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below. Add variable.	Please contact us if you have any questions.	
PriceBooks Scheduling	¢			Aod variable     Enable Notification		
Timesheet     Client     Integrations	с с				UPDATE TEMPLATE CANCER	

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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE INVOICES TIMESHEET SNOW	VTRACK P.O. REPORTS	📫 🗅 <b>6</b> 🎄 🤅
Company Settings	٢	Job Invoi	iced Email Template	х ———	
â Office Users		Subject	Your Job Status has been updated for {{JobNumber}	Preview	
🗶 Field Employees	٢	Job Assi, Body:	Hello {{CustomerName}},	t Active	
R Vehicle Tracking	<	Job Com	The Invoice for Job {(JobNumber)} has been sent to you. The Job was completed on {{Date}} at {{ServiceLocation}}.	From: head@corporation.com t Active Subject: Your Job Status has been updated for 100500 t Active	
Reminders		Job Can	Please contact us if you have any questions or need	t Active	
Reports	K	Travelin		Hello Acme Corporation, The invoice for job 105500 has been sent to you. The job was completed on 02/02/2020 at 455 Larkspur Dr. Apt 23	
Membership			* You can include some dynamic fields with your email templates. To add a dynamic fields, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button	Baviera, CA 92908. Please contact us if you have any questions or need	
🚆 Inventory	<		below.		
PriceBooks	<				
🛗 Scheduling	<		Enable Notification		
C Timesheet	<			UPDATE TEMPLATE CANCEL	
Client Client	<				

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.

IndusTrack MAP	CUSTOMER	ESTIM	IATES SCI	HEDULE INVOICES TIMESHEET SNOWTR	CK P.O. REPORTS	aij 🗅 🚯 🏟 🕲
🖀 Company Settings	<	Jobs	lob Invoice	ed Email Template	x	
🍰 Office Users			,			
🗙 Field Employees	<	Event Job Assi	Subject:	Your Job Status has been updated for {{JobNumber}}	Preview	us : Active
R Vehicle Tracking	¢	Job Com	Body:	Hello {(CustomerName)},		Active
Reminders		Job Invo Job Can		The Invoice for Job {(JobNumber}) has been sent to you. The Job was completed on {(Date)} at {(ServiceLocation)}.	From: head@corporation.com Subject: Your Job Status has been updated for 100500	: Active : Active
Reports	¢	Travelin		Please contact us if you have any questions or need	Hello Acme Corporation,	Active
Mobile App				ഭ്	The Invoice 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.	
Membership				* You can include some dynamic fields with your email templates.	Baviera, CA 92908. Please contact us if you have any questions or need	
🔜 Inventory	¢			To add a dynamic fields, set the cursor in proper place inside Subject or Body edit box and click on a dynamic field button below.	Prease contact us in you have any questions or need	
PriceBooks	<			CustomerName		
Scheduling	<			Date Time		
0 Timesheet	٢.			JobNumber		
E Client	<			ServiceLocation		
2 Integrations	<		_	JobDescription	UPDATE TEMPLATE CANCEL	
				TaskDescription 🔻		

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**.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE I	NVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS 🖳 🖓 🔅 🤅
🖀 Company Settings	¢	Jobs Invoice	es Client II	ventory	Contracts	Equipment	Vehicle	
🚨 Office Users		Reorder point						
🔀 Field Employees	٠	Set Global Reor Items	rder For All Inventor	Value				
R Vehicle Tracking	<							
Reminders								
Reports	٠							
Mobile App							CA	ANCEL SAVE

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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS 🤐 🖵 🕜 🔅 🕲
🚔 Company Settings	•	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle	
🍰 Office Users		Reorder point						
🗙 Field Employees	۲.	Set Global Reor Items	der For All Inve	ntory Value				
R Vehicle Tracking	٢			1				
Reminders								
Reports	<							
Mobile App			$\mathbf{N}$				CA	SAVE SAVE

Key in the Reorder level on the Value field.

IndusTrack	MAP	CUSTOMER	ESTI	MATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	
🖨 Company	Settings	¢	Jobs	Invoices	Client	Inventory	Contracts	Equipment	Vehicle		
💄 Office Use	ers		Reord	ler point					1		
🄀 Field Empl	loyees	<	Set G Items		er For All Inve	ntory Value					
R Vehicle Tr	racking	<				25					
Reminder	's										
Reports		<					$\sim$			_	
📕 Mobile Ap	op								CA	NCEL 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	TIMESHEET	SNOWTRACK	P.O.	REPORTS	1911, 🗅 🕓 🔅
🖀 Company Settings	¢	Jobs Invoice	es Client	inventory	Contracts	Equipment	Vehicle		
Office Users		Reorder point	t						
🎽 Field Employees	¢	Set Global Reo Items	rder For All Inve	ntory Value					
🛤 Vehicle Tracking	٢			25					
Reminders									
Reports	٢								
Mobile App							CA	NCEL SAVE	
IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRAC	К Р.О.	REPORTS	🕰 📮 🛛 🏟 (
Industrack MAP			SCHEDULE	INVOICES	TIMESPIELI	SNOWTRAC	× P.U.	REPORTS	
R Vehicle Tracking	Edit Inventor	/							X ACTIONS +
Reminders	General						Stock		On Hand
Reports		Name *	Forged Pisto	n Lit		-	Asset Accour	Inventory Asset	
Mobile App		sкu	fp3838				Main wareho Reorder poir	use quantity on hand * 1499 It 25	
Membership		Vendor	RS Spare Part	5			🗌 Use seri	al #s (Quantity calculates automatically depending serial numbers	, ,
		Non taxable							

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 I	NVOICES TIMESHEET S	SNOWTRACK P.O.	REPORTS 🔨 🖓 🗘
R Vehicle Tracking	¢	Jobs Invoices Client Ir	ventory Contracts Equ	uipment Vehicle	
Reminders		Reorder point			
Reports	٢	Set Global Reorder For All Inventory Items	/ Value		
Mobile App			33		
Membership					
H Inventory	٢			CAN	CEL SAVE
PriceBooks	<				

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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS 🖳 🖓 🚱 🔅 🕲
Nehicle Tracking	٠	Jobs Invoices	Client	Inventory	Contracts	Equipment	Vehicle	
Reminders		Reorder point						
Reports	¢	Set Global Reord Items	ler For All Inve	ntory Value				
Mobile App								
📰 Membership								
Max Inventory	<						CA	CANCEL SAVE
PriceBooks	<							

## Contracts

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

#### Service Contract Expiration

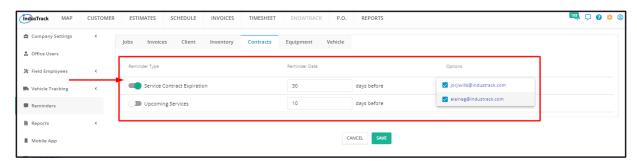
Create Service Agreements with expiration dates under the Customer's Book. With IndusTrack's Contract Reminder Settings, set up reminder emails to be sent to specific staff in order to offer renewal and continue the business with the client.

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.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🏨 🖵 😮 🌣 🙁
🖀 Company S	Settings	¢	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle			
🚨 Office User	rs										
💥 Field Emplo	oyees	¢	Reminder Type				Reminder Date			Options	
🋤 Vehicle Tra	acking	¢	Service C	iontract Expirati	on		30		days before	2 email(s) selected 🔻	
Reminders	i		Upcomin	ig Services			10		days before	Show in popup	
Reports		¢								/	
📕 Mobile App	p							C	ANCEL 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		19 <u>3</u> 🖵 😗
Company Settings	٢	Jobs Invoices	Client	Inventory	Contracts	Equipment	Vehicle			
Office Users	\[         \]     \[         \[         \]     \[         \]     \[         \]     \[         \[         \]     \[         \[         \]     \[         \[         \[         \[									
🎗 Field Employees	c l	Reminder Type				Reminder Date			Options	
🛤 Vehicle Tracking	¢	Service Co	ontract Expiratio	n		30		days before	2 email(s) selected 🛛 👻	
Reminders		Upcoming	Services			10		days before	Show in popup	
Reports	٢									
Mobile App							C	NCEL 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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		📑 🗘 🚯
Company Settings	۲.	Jobs Invoices	s Client	Inventory	Contracts	Equipment	Vehicle			
Office Users										
Field Employees	•	Reminder Type				Reminder Date			Options	
🖡 Vehicle Tracking	<	Service C	ontract Expiratio	on		30		days before	2 email(s) selected 🛛 🔻	_
Reminders			g Services			7		days before	Show in popup	

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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🖳 🗅 🗘 🌼 🤇
Company Settings	٠	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle			
🍰 Office Users										
💥 Field Employees	<	Reminder Type				Reminder Date			Options	
🛤 Vehicle Tracking	٠	Service C	Contract Expirati	on		30		days before	2 email(s) selected 🛛 👻	-
Reminders		Upcomin	ng Services			10		days before	Show in popup	
Reports	<									
Mobile App							6	ANCEL 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	<	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle			
🍰 Office Users										
🎗 Field Employees	~	Reminder Type				Reminder Date			Options	
🛤 Vehicle Tracking	- C	Service C	ontract Expirati	on		30		days before	2 email(s) selected 📼	_
Reminders		Dpcomin	g Services			10		days before	Show in popup	
Reports	<									
Mobile App							C	INCEL 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.

ndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRAC	P.O.	REPORTS		👼 🗅 🐧 🕻
Company Settings	¢	Jobs Invoice	es Client	Inventory	Contracts	Equipment	Vehicle			
Soffice Users										
🛠 Field Employees	· ·	Reminder Type				Reminder Date			Options	
Vehicle Tracking	¢	Equipme	ent Warranty Exp	iration		30		days before	2 email(s) selected 🛛 👻	
Reminders							_			
Reports	¢						C	INCEL SAVE		

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	٢	Jobs Invoices Client	Inventory Contracts	Equipment Vehicle			
S Office Users							
🔀 Field Employees	¢	Reminder Type		Reminder Date	Optio	ns	
Vehicle Tracking	¢	Equipment Warranty Exp	piration	15	days before 2 e	mail(s) selected 🔻	◄
Reminders							
Reports	٢			CAN	ICEL 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		193, 🖵 🕜
Company Settings	۲	Jobs Invoid	es Client	Inventory	Contracts	Equipment	Vehicle			
Office Users										
🎗 Field Employees	$\sim$	Reminder Type				Reminder Date			Options	
R Vehicle Tracking	٢	🗩 Equipm	nent Warranty Exp	piration		15		days before	2 email(s) selected 📼	
Reminders										
Reports							c	ANCEL 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			193 🖵 🖓	) 🌼 🙁
🖀 Company Settings 🔪	ć	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle	1				
🍰 Office Users	<b>1</b>	Reminder Type				Reminder Date		-	Options			
💥 Field Employees		•										
Kehicle Tracking	¢	Vehicle F	legistration			30		days before	Email(s)	•		
Reminders		License I	Renewal			30		days before	Email(s)	*		
Reports	¢	Medical	Card Renewal			30		days before	Email(s)	•		
Mobile App	l											
E Membership							C	NCEL 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		ni 👌 👌 🤹 🕲
Company Settings	۲.	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle			
Office Users									_	
🗶 Field Employees	•	Reminder Type				Reminder Date			Options	
Kehicle Tracking	<	Vehicle F	Registration			30		days before	Email(s) 👻	
Reminders		License I	Renewal			30		days before	Email(s) 🔻	
Reports	<	Medical	Card Renewal			30		days before	Email(s) 👻	
Mobile App									J	
Membership							C	INCEL SAVE		
🗮 Inventory	<									

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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🏨 🖵 🝞 🌼 🙁
Company Settings	۲.	Jobs Invoice	s Client	Inventory	Contracts	Equipment	Vehicle			
Office Users										
🎗 Field Employees	¢	Reminder Type				Reminder Date			Options	
🛤 Vehicle Tracking	¢	Vehicle F	legistration			30		days before	2 email(s) selected 🔹	
Reminders		License F	Renewal			30		days before	2 email(s) selected 📼	
Reports	٢	Medical	Card Renewal			30		days before	Jorjiwills@industrack.com	
Mobile App									elaineg@industrack.com	
Membership							C	ANCEL SAVE		
Handress Inventory	<									

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.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		133 🖓 🗘 😯 🔅
🚔 Company Settings	۲.	Jobs Invoice	es Client	Inventory	Contracts	Equipment	Vehicle			/
🍰 Office Users										
🄀 Field Employees	<	Reminder Type				Reminder Date			Options	
R Vehicle Tracking	¢	Vehicle P	Registration			25		days before	2 email(s) selected 📼	
Reminders		License 💭	Renewal			30		days before	1 email(s) selected 📼	
Reports	<	Medical	Card Renewal			30		days before	2 email(s) selected 🛛 👻	
Mobile App										
Membership							G	INCEL SAVE		

#### **Disable the Reminder**

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

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🏨 🖓 🔅 🌼
🖀 Company Settings	¢	Jobs Invoice	es Client	Inventory	Contracts	Equipment	Vehicle			
Office Users										
🄀 Field Employees	<	Reminder Type				Reminder Date			Options	
Phicle Tracking	<	Vehicle P	Registration			25		days before	2 email(s) selected 🔹	
Reminders		License I	Renewal			30		days before	1 email(s) selected 🛛 👻	
Reports		Medical	Card Renewal			30		days before	2 email(s) selected 🛛 🔻	
Mobile App	/									
Membership							C	ANCEL SAVE		