

CRM

The **Customer** module holds the information for all your customers in one place. If you want to look up a customer account, use the search bar and you may search for a record by information displayed in the columns.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
201	2 wheels club	joshua	aligato	71 A Lopez St Cebu PH 39746	(662) 369-2796		josh@radtimes.com	Expiration Date: Aug 29, 2024	
2418	344 N CHARLES ST APARTMENTS LLC			6212 YORK RD BALTIMORE MD 21212	(410) 435-4600		bharrington@whcampbell.com	Net 60	
7195	344 N CHARLES ST APARTMENTS LLC			6212 YORK RD BALTIMORE MD 21212	(410) 435-4600		bharrington@whcampbell.com	Net 60	
266	395 Bangor Brewer, LLC	395 Bangor Brewer, LLC		P.O. Box 020783 Miami FL 33102-0783	306-6474			Net 60	
2415	3-D INTERNATIONAL							Net 60	
3172	3-D INTERNATIONAL							Net 60	
4880	401 N. CHARLES LLC			401 N. CHARLES STREET BALTIMORE MD 21201	(443) 865-2670		GENE@THEVICTORYREALTYGROUP.COM	Net 60	

From the **Customer homepage**, you can click on any customer record and their complete profile will be displayed. You can create or assign tag(s) from the top. And if you want to edit the customer profile, click **EDIT CONTACT** from the top-right corner.

2 wheels club Tags: Assign

EDIT CONTACT

Contact Info:
Customer Number: 201
Contact name: joshua aligato
Phone: (662) 369-2796
Email: josh@radtimes.com

Billing Address:
40915 45th Hwy S
Hamilton, MS 39746

Service Location:
71 A Lopez St
Cebu, PH 39746

Awaiting Payments: \$ 0.00
Invoice overdue: \$ 0.00
Pending Quotes: \$ 0.00

Location | Estimates | Jobs | Invoices | Equipment | Reminders | Notes | Attachments | Geofences | Messaging | Contracts

Filter: CLEAR FILTER Actions

Location name	Contact Name	Location	Phone Number	Email
arizona		248 N Leandro Cir Mesa AZ 5207		
	gorji v	40915 45th Hwy S Hamilton MS 39746	(662) 369-2796	gorjiw@gmail.com
		7169 SECURITY BLVD BALTIMORE MD 21244	(662) 369-2796	josh@radtimes.com
New York		5 Frost Pond Rd New Hyde Park NY 11040		

You can find service locations for this customer under **Location** tab. You can edit any location and even delete any service location if needed. You can also create a new contact from this section and choose to send estimates/invoices to those contacts.

The screenshot shows the 'Location' tab for customer '2 wheels club'. It displays a table of service locations with columns for Location name, Contact Name, Location, Phone Number, and Email. A dropdown menu is open, showing options to '+ Create Service Location' and '+ Create Contact'. The interface also includes contact information, billing address, and service location details.

Location name	Contact Name	Location	Phone Number	Email
arizona		248 N Leandro Cir Mesa AZ 5207		
	gorji v	40915 45th Hwy S Hamilton MS 39746	(662) 369-2796	gorjiw@gmail.com
		7169 SECURITY BLVD BALTIMORE MD 21244	(662) 369-2796	josh@radtimes.com
New York		5 Frost Pond Rd New Hyde Park NY 11040		

From the **Estimates** tab, you can view all estimates created for a customer. You can view the estimates for specific statuses and even for a specific date range. Click 3 dots to get options on Edit, Copy, Preview, Print, Send, Delete and others. You can mark an estimate as Won or Lost and even convert an estimate into a job or an invoice using the Actions button.

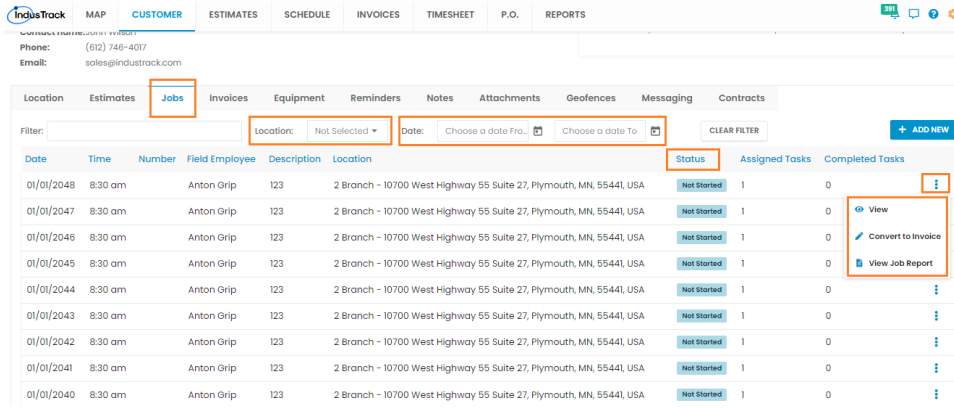
The screenshot shows the 'Estimates' tab for customer '2 wheels club'. It displays a table of estimates with columns for Number, Company, Location, Description, Date, Created by, Value, and Status. A dropdown menu is open, showing options like Draft, Sent, Won, Scheduled/Assigned, Lost, Invoiced, and Change Requested. The interface also includes search filters and an 'ADD NEW' button.

Number	Company	Location	Description	Date	Created by	Value	Status
366	2 wheels club	71 A Lopez St, Cebu, PH, 39746				\$500.00	Assigned
290	2 wheels club	71 A Lopez St, Cebu, PH, 39746			Williams	\$180.00	Scheduled
289	2 wheels club	71 A Lopez St, Cebu, PH, 39746			Williams	\$360.00	Won
288	2 wheels club	71 A Lopez St, Cebu, PH, 39746			ills	\$180.00	Draft
285	2 wheels club	arizona, 248 N Leandro Cir, Mesa, AZ, 5207	Various Remediations	07/28/2023	Jorji Williams	\$180.00	Scheduled

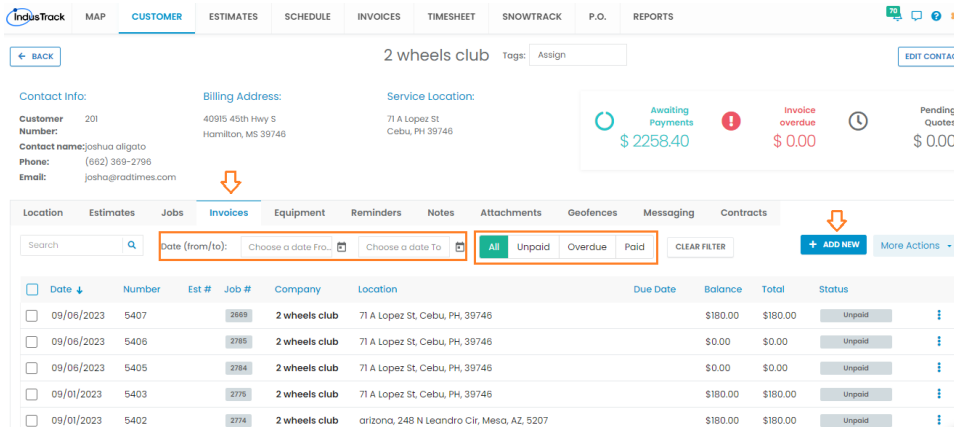
The screenshot shows the 'Estimates' tab for customer '2 wheels club'. It displays a table of estimates with columns for Number, Company, Location, Description, Date, Created by, Value, and Status. A dropdown menu is open, showing options like Edit, Copy/Clone, Preview, Print, Send, Convert to Job, Convert to Invoice, Mark As Won, Mark As Lost, Mark As Draft, and Delete. The interface also includes search filters and an 'ADD NEW' button.

Number	Company	Location	Description	Date	Created by	Value	Status
1256	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	AC Repair	09/15/2023	Raz Bajwa	\$50.00	Draft
1255	ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	HVAC service	09/05/2023	Sharon F	\$124.00	Draft

From the **Jobs** tab, you can view all jobs created for a customer and their statuses. You can view jobs for a particular location and during a specific time frame. Click on 3 dots to view the job itself and make any changes if required, convert the job into an invoice or you can also view a detailed job report.



From the **Invoices** tab, you can view all invoices created for a customer and their statuses. You can view the invoices for different statuses like Unpaid, Overdue or Paid and even view them for a specific date range. Click 3 dots to get options on Edit, Copy, Preview, Print, Send, Delete. You can view an estimate associated with the invoice and even detailed job report can be accessible. If you would like to receive payment on any invoice, click Receive Payment and complete the necessary steps involved.



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

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Search [] Date (from/to): Choose a date From [] Choose a date To [] All Unpaid Overdue Paid CLEAR FILTER + ADD NEW More Actions

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
09/06/2023	3507			ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911		\$0.00	\$0.00	Unpaid
09/05/2023	3506			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	
08/07/2023	3504	1252	2873	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$362.28	\$362.28	
07/24/2023	3501			ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	08/08/2023	\$175.80	\$175.80	
06/26/2023	3498		2884	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	07/11/2023	\$2,824.50	\$2,824.50	
06/20/2023	3495	1234	2858	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$1,095.78	\$1,095.78	
06/19/2023	3494		2857	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$1,605.45	\$1,605.45	
06/15/2023	3493	1233	2856	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$885.70	\$885.70	

From the **Equipment** tab, you can view all equipment installed on the customer's site. You can even view equipment for a particular location. Click 3 dots to edit an equipment, add Service Notes to keep track of service done on the equipment, delete the equipment and you can even view the Equipment Detailed Report to track the job history and notes associated with it.

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

ABC Company Tags: Assign Collection Geofence Maintenance customer EDIT CONTACT

Contact Info: Customer Number: 12345 Contact name: John Wilson Phone: (612) 746-4017 Email: sales@industrack.com

Billing Address: 8330 Lovers Ln Phillips, WI 54555

Service Location: 400 S 4th St., Suite 1000M Minneapolis, MN 55415

Awaiting Payments \$0.00 Invoice overdue \$0.00 Pending Quotes \$174.00

Location Estimates Jobs Invoices **Equipment** Reminders Notes Attachments Geofences Messaging Contracts

Filter: Location: Not Selected Parts Equipment CLEAR FILTER + ADD NEW EQUIPMENT

Name	Manufacturer	Model	Serial Number	Install Warranty	Location	Notes
Rtu	Carrier	ABC			ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Test equipment note
Compound Pressure Gauge	Wika	9831538			3rd location - 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911, United States	
Test	Roz	1234	1234		ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Noted for equ change filter. Equipment m
AC condenser	AC condenser	AC condenser	04	04/01/2025	ABC Company - 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	This is test no

Equipment Detailed Report

General Manufacturer: Carrier Model: ABC Vendor: Serial: Description: Notes: Note for today

Service Location 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA Location

Warranty Manufacturer Warranty: Installation Date: Install Warranty Expiration:

Job History

Job Number	Record Date	Employee	Service Type	Field Notes	Office Notes
+2084	01/24/2023 07:49 AM	Roz B			
+2086	02/02/2023 10:30 AM	Roz B		Test my notes	This is LI filter for panera bread
+2100	03/02/2023 11:00 AM	Roz B		Notes	This is LI filter for panera bread, add parts

Set the **Reminders** for the office users. You can assign a reminder to one or more office users and even notify customers through it.

2 wheels club

Contact info: Customer Number: 201
Billing Address: 40915 45th Hwy S, Hamilton, MS 39746
Service Location: 71 A Lopez St, Cebu, PH 39746

Awaiting Payments: \$2258.40
Invoice overdue: \$0.00
Pending Quotes: \$0.00

Reminders

Created Date	Due Date	Subject	Description	Location	Status
No data available in table					

Add New Reminder

Subject *

Due Date 9/12/2023 5:42 PM Show in pop-up

Details

Assigned to location Not Selected

Assign to office user 3 user(s) selected

Notify customer Customer emails Emails

Office, job and site notes are under the **Notes** section.

Office notes: These are the notes entered by the office user/dispatcher. These are internal notes only for office users.

Job notes: These are the notes entered by the field employees using their mobile app. These can be the notes to inform the office users about what was done on the job site.

Site/Pinned notes: These are the notes permanently attached to the customer. These notes are automatically attached when the job is dispatched.

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

2 wheels club Tags: Assign EDIT CONTACT

Contact Info: Customer Number: 201
Billing Address: 40915 45th Hwy S, Hamilton, MS 39746
Service Location: 71 A Lopez St, Cebu, PH 39746

Awaiting Payments: \$ 2258.40
 Invoice overdue: \$ 0.00
 Pending Quotes: \$ 0.00

Location: Not Selected
 Office only | Job notes | Site notes | CLEAR FILTER | + ADD OFFICE NOTES

Date	Location	Notes	User	Job #	Task Name
06/22/2023	2 wheels club - 71 A Lopez St, Cebu, PH, 39746	note		2425	Jorji
06/22/2023	2 wheels club - 71 A Lopez St, Cebu, PH, 39746	note from Iphone		2425	iphone test
07/21/2023	2 wheels club - 71 A Lopez St, Cebu, PH, 39746	Test note	Chrism@industrack.com		
07/24/2023	arizona - 248 N Leandro Cir, Mesa, AZ, 5207	Site Notes JORJI SITE NOTE JULY 24	Jorjiw@industrack.com		

Add New Note

Note text *

Site Note

Assign note to a service location: Not selected

CLOSE SAVE

You can upload files such as site maps, contracts, pictures, and everything can be accessed under the **Attachments** section. These attachments will also be available to select when you are creating a job for this customer. The pictures uploaded by your field employees while they were on the job site will also be accessible under **Attachments** section.

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

2 wheels club Tags: Assign EDIT CONTACT

Contact Info: Customer Number: 201
Billing Address: 40915 45th Hwy S, Hamilton, MS 39746
Service Location: 71 A Lopez St, Cebu, PH 39746

Awaiting Payments: \$ 2258.40
 Invoice overdue: \$ 0.00
 Pending Quotes: \$ 0.00

Attachments

Filter: CLEAR FILTER + ADD NEW

Date	Location	Job #	Task Name	Employee Name	File Name	Notes
06/22/2023		2425	Default	Jorji Wills	IMG_1687445038301.jpg	
06/22/2023		2425	Default	Jorji Wills	IMG_1687445048944.jpg	
06/22/2023		2425	Default	Jorji Wills	IMG_1687445059741.png	
06/22/2023		2425	Default	Jorji Wills	IMG_1687445079624.png	
06/22/2023		2425	Default	Jorji Wills	IMG_1687445090009.png	
06/22/2023		2425	Default	Jorji Wills	IMG_1687445101699.jpg	

From the **Messaging** tab, you can send unlimited email messages to your customer and every message

will be logged under the **Messaging** section. The email messages work one-way, and we cannot receive messages back into our system.

The screenshot shows the 'Messaging' tab selected in the 'Contracts' section. The top navigation bar includes 'IndusTrack', 'MAP', 'CUSTOMER', 'ESTIMATES', 'SCHEDULE', 'INVOICES', 'TIMESHEET', 'SNOWTRACK', 'P.O.', and 'REPORTS'. The customer name '2 wheels club' is displayed. A summary box shows financial status: 'Awaiting Payments \$2258.40', 'Invoice overdue \$0.00', and 'Pending Quotes \$0.00'. Below this, a table lists messaging items with columns for 'Email Addresses', 'Created At', 'Subject', and 'Status'. An 'ADD NEW' button is visible in the top right of the table area.

You can view the list of all **Upcoming services** under **Service Contracts** tab. Switch to **Contract list** sub-tab to view all service contracts associated with the customer. Click **Add New** button to start creating a new Service Agreement.

This screenshot shows the 'Upcoming services' sub-tab selected. The navigation bar is the same as the previous screenshot. The summary box is identical. The table below has columns for 'Service Location', 'Service Type', 'Due Date', and 'Create Schedule'. It lists five upcoming services with due dates ranging from 09/15/2023 to 11/10/2023. A 'CLEAR FILTER' button is present in the top right of the table area.

This screenshot shows the 'Contract list' sub-tab selected. The navigation bar remains the same. The summary box is identical. The table below has columns for 'Description', 'Job Template/Service Types', 'Start Date', 'End D', and 'Membership'. It shows one contract starting on 08/29/2023 and ending on 08/29/2024. An 'Add New' button is visible in the top right of the table area.