

Scheduling a Job

To add an unassigned job in the system, navigate to **Schedule** module and click **Actions** button, then select **Add Unassigned job**. If you don't yet know which field employee will perform the job, the best is to create an unassigned job. Once you have a clear direction on field employee assignment, you can go ahead and assign a crew member to that unassigned job.

The screenshot shows the IndusTrack SCHEDULE module interface. The 'SCHEDULE' tab is active. The 'Actions' dropdown menu is open, showing 'Add unassigned Job' as the first option, which is highlighted with a red box. An orange arrow points to the 'Actions' button, and another orange arrow points to the 'Add unassigned Job' option. The main grid shows a timeline for 28 Aug 2023 with columns for 8 am, 9 am, 10 am, 11 am, 12 pm, 01 pm, 02 pm, 03 pm, 04 pm, and 05 pm. The rows list employees: [1] Karl Hylle, [0001] Genius Giant, [2] Will a, [0002] Lauro Egula, [4] Raz B, [0005] Justimus Prime, [15] Ryan Mobile, and [23] Michael Scott.

If you already know the field employee who will perform the job, you can add an **assigned job** by double-clicking on the grid for any field employee and the Add New Job screen will pop-up.

The screenshot shows the IndusTrack SCHEDULE module interface. The 'SCHEDULE' tab is active. The main grid shows a timeline for 12 Sep 2023 with columns for 8 am, 9 am, 10 am, 11 am, 12 pm, 01 pm, 02 pm, 03 pm, 04 pm, 05 pm, and 06 pm. The rows list employees: [1] Karl Hylle, [0001] Genius Giant, [2] Will a, [0002] Lauro Egula, [4] Raz B, [0005] Justimus Prime, [15] Ryan Mobile, and [23] Michael Scott. An orange arrow points to the grid area.

Assuming you have already uploaded your customers, search for the **Customer** and if the customer has multiple locations, you can choose one from the **Service Location** drop-down.

Add New Job

The screenshot shows the 'Add New Job' form with several sections. On the left, there are two orange-bordered boxes: 'Select Customer *' and 'Select Service Location'. The 'Select Customer *' box contains a search field with 'R A Tent' entered. Below it, customer details are listed: Company (R A Tent (200)), Contact Name (Jacob Elorde), E-mail (jacob@gmail.com), and Address (1301 2nd St NW, Waseca, MN, 56093). The 'Select Service Location' box contains a search field with 'Main Location, 71 A Lopez St, Cebu, PH, 39746' entered. Below it, location options are listed: 'Main Location, 1301 2nd St NW, Waseca, MN, 56093' (highlighted) and 'Location#1, 19 Delisle Ave, Roosevelt, NY, 11575'. On the right side of the form, there is a 'Tags: Assign' section and a list of dropdown menus for 'Parts/Services/Equipment [0]', 'Pricebooks [0]', 'Existing Customer Equipment [0]', 'Attachments [0]', 'Forms [0]', 'Purchase Orders [0]', and 'Notes'. An orange arrow points from the 'Select Service Location' box to the location list.

Add **Job Description** and at the bottom you can change the **Start** and **End** date/time and set the **estimated duration** for the job. Please note this is just an estimated duration that you have entered. The reports will show the actual start and end time that your field employees will record on the job site.

The screenshot shows the job details form with several fields. The 'Job Description *' field is highlighted with an orange box and contains the text 'Job Description'. Other fields include 'Job Status' (Not Started), 'Job Number' (Auto increment), 'Job Priority' (None), 'Service Type' (dropdown), and 'Job Color' (dropdown).

Job Schedule

The screenshot shows the 'Job Schedule' section with several fields. The 'Start Date' field is 9/5/2023 and the 'End Date' field is 9/5/2023. The 'Time' field is 9:56 PM. The 'Duration' field is 1 h 0 m. There is a 'RECURRENCE' button with a circular arrow icon.

Assuming you already have items added in your inventory, you can now add the **parts/services/equipment** to this job. This is optional for dispatchers and techs in the field can add parts.

Actions ▾

Parts/Services/Equipment [0]	▾
Pricebooks [0]	▾
Existing Customer Equipment [0]	▾
Attachments [0]	▾
Forms [0]	▾
<div style="display: flex; align-items: center; gap: 10px;"> Form <div style="border: 1px solid #ccc; padding: 2px;">Post Job Checklist ▾</div> <div style="border: 1px solid #ccc; padding: 2px;">Select form trigger ▾</div> <div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">ADD</div> </div>	
Purchase Orders [0]	▾
Notes	▾

If the job requires part, you can create a **purchase order** and attach it to a job.

Actions ▾

Parts/Services/Equipment [0]	▾
Pricebooks [0]	▾
Existing Customer Equipment [0]	▾
Attachments [0]	▾
Forms [0]	▾
Purchase Orders [0]	▾
	<div style="display: flex; align-items: center; gap: 10px;"> ➔ <div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Create</div> </div>
Notes	▾

You can add **notes** for your field employees.

Please see below the details for each note:

Notes for field employee: These are the notes entered by the office user/dispatcher. These can be the instructions for the field employees to inform them what service they would have to perform on the job site.

Field 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.

Pinned/Site note: These are the notes entered for your field employees. These can be the gate codes for accessing property or notes about the parts of the property that are regularly serviced.

Notes

Notes for field employee
Office user
add notes for field employees

Field notes
Notes from Techs/mobile users/employees

Pinned/Site note
pinned notes are the notes associated with the selected customer

May 24 note

Navigate to **Employee(s)** tab and assign one or more crew members to the job.

Add New Job

Job Info Employee(s) (0) Tasks (0)

Add Crew
None

Filter

- [Group] - [1] Akiva Test 1
- [Group] - [1] }
- [Group] - [0] }
- [Group] - [3] Albert's group
- [Group] - [0] All
- [Group] - [0] Andreys Group
- [Group] - [0] Andreys second group

CANCEL SAVE JOB DISPATCH NOW

Once done, you can save the job and it won't be dispatched. If you choose to dispatch the job, your field employee(s) will be notified on their mobile app, and they can start the job.