

HOW TO SET UP A CUSTOMER TO RECEIVE REPORTS

Your customer may want to receive reports showing details of the work you have completed for them, without adding a user to the customer account.

Note: This document assumes a customer account has been created. Please refer to the document *How to Create a Customer Account* to guide you through process.

This document covers:

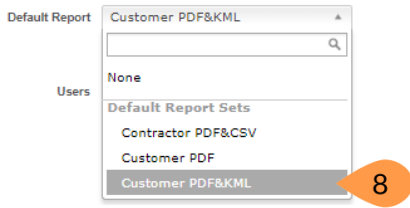
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Note: It is recommended that TracMap is accessed using the browser Google Chrome.

HOW TO ADD OR CHANGE THE REPORTS THE CUSTOMER RECEIVES

- 1 Click **Admin**
- 2 Click **Customers** tab if not already selected
- 3 All your customers will display
- 4 Click on the customer that will receive reports
- 5 If there is no default report set assigned, or to change the default report set the customer receives, hover over the report set name.
- 6 Click on the pencil icon
- 7 Click the dropdown arrow that appears

8 Select the report set for the customer



9 Click Save



ADDING THE EMAIL ADDRESS WHERE THE REPORTS WILL BE SENT

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Switch To	Edit Notifications	Give Access	Actions...
Account ID 82309	Can Have Sub-accounts No		
Account Name Mt Albert Farms Ltd	Can Manage Jobs No		
Emails N/A	Auto Complete Orders No		
Phone N/A	Parent Account JJ Ltd Agri Contracting D...		
Creation Date 19/07/2016 9:43 AM	Default Report Customer PDF&XML		
Last Activity N/A	Users N/A		

1 Click Edit Notifications

Edit Account Notifications

Email: mtalbertfarms@gmail.com

Receive Reports

New / Accepted Orders

Arrival / Departure

2 Enter the email address

3 Ensure **Receive Reports** is ticked

4 Click **Save**

Add Email Add Number Cancel Save

Edit Account Notifications

Email: mtalbertfarms@gmail.com

Receive Reports

New / Accepted Orders

Arrival / Departure

Email: mtalbertfarms@gmail.com

Receive Reports

New / Accepted Orders

Arrival / Departure

If you want to add more than one email address to receive reports:

5 Click Add Email

6 Repeat steps 2 - 4

7 Repeat steps 5 and 6 until all the email addresses have been entered

Add Email Add Number Cancel Save

The customer is now set up to receive reports.

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The reports will be sent by TracMap as soon as a contractor completes a returned job. Please see the document *How to Complete a Customer's Job*.