

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 the process.

This document covers:

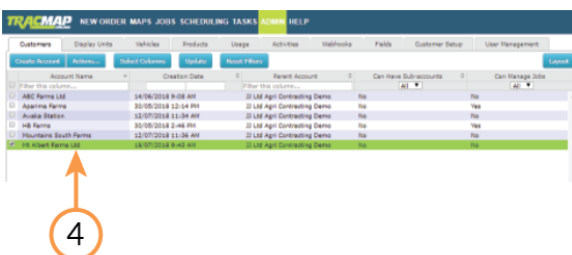
- How to add or change the reports the customer receives
- Adding the email address where the reports will be sent

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

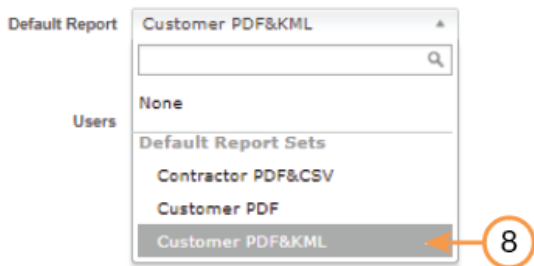


5. If there is no default report set assigned, or to change the default report set the customer receives, hover over the report set name.

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

Mt Albert Farms Ltd

Switch To Edit Notifications Give Access Actions...

Account ID 82399	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 19/07/2018 9:43 AM	Default Report Customer PDF&KML
Last Activity N/A	Users N/A

1. Click 'Edit Notifications'

Edit Account Notifications ✕

Email

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

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

Edit Account Notifications ✕

Email

Receive Reports

New / Accepted Orders

Arrival / Departure

Email

Receive Reports

New / Accepted Orders

Arrival / Departure

Add Email Add Number Cancel Save

5. Click 'Add Email'

6. Repeat steps 2 – 4

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

The customer is now set up to receive reports. 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](#).