



Work Recently Done and Roadmap April 2021

Thanks to all our clients and prospects who have supported us and helped shape Trackplan and drive it in a good direction.

Special thanks for recent support to:

- Royal College of Surgeons, Ireland
- Simply Solutions, UK
- Kildare County Council, Ireland
- MKF Property and Guinness Storehouse, Ireland
- Saudia Aerospace, Saudi Arabia
- Filtertek, Ireland
- Talleys Food Group, New Zealand
- Gyroscope, UK
- Cork and Kerry Voluntary Emergency Services
- Momentum Support and St James Hospital, Ireland

...and many others.

Work done from July 2020 to March 2021

Client contracts – allocate sites, SLAs, contractors, margins by contract
Job Costs, Sales, Contractor Quotes and Sales Quotes
Integration with Xero
Smart allocation of jobs to contractors by job type and region
Send Electronic forms by email to remote user. Great for Permits to Work. No login needed.
Quick links on job list and job calendar for ease of navigation. Jump to your favourite view of the job calendar to show jobs by your team.
Purchase Orders and Finance Codes
QR Codes by sites, locations and assets. Scan QR codes from apps to view site, location or asset.
Free text search for assets in Apps
Contractor Dashboard and Quote list in Contractor Portal
Email link for contractor to access contractor portal with no login needed
Dashboard designer – design dashboards from our library of charts and grids
Custom Labels for most fields on most screens. Great for foreign language or sector specific labels.
Apps – navigate through sites, locations and sublocations with ease
Manager App – Create and view your jobs only. Quick and Easy
Resource Availability – Available, Busy, Offline – Great for job scheduling
Transport Jobs for Emergency Services
Calendar Colours – Set the colours of the job bricks by status, priority, user, team, site. Great for easier scheduling.

Job List Colours – Set the colours for the team and priority and have these showing on the main job list.

Manager App – Can set landing page for user. Forgotten password and change password.

Contractor documents – Can view all documents uploaded by contractor in document manager.

Asset Tree – Can view assets in a filterable tree. Great visual aid and can move assets around quickly.

Multiple engineers can be allocated to one job task. Each engineer can see the same task on the Resource App and who else is on the task. (COMING VERY SOON)

Assets. Can assign a team to an asset. So jobs raised against that asset get allocated to that team. (COMING VERY SOON)

Asset subclasses – for organisations with a large and complex hierarchy of assets (COMING VERY SOON)

Planned maintenance – next job to be created driven by the number of operational hours. Currently driven by frequency only. (COMING VERY SOON)

Roadmap for April 2021 and beyond

Assets and required stock levels for consumable and critical stock
Allocate teams of users to stock levels. These users can manage their stock levels and reorder levels and receive relevant notifications
QR Codes on storage areas (holding stock). Using the apps, a user can scan the QR code and record the amount of stock they are removing
Purchase Order authorisation levels and workflow
On the apps user can upload photos and comments against an asset
Requestor App – a third app specifically designed for remote user such as office workers and tenants to create issues quickly and easily
Main contractors can manage their team of engineers through the contractor portal and issue work to them on the Resource App.
On the apps a user can change the asset status. Great for easily managing the condition of assets in real time.
Free text filter on apps when searching for sites and locations.
Foreign Language templates – we already have custom labels for the most important screens. Soon we can extend this to offer screens in different languages user by user.
Google translate API for user entered text like job details – so can be displayed in other languages.
CAD and PDF viewer. These documents can already upload these documents into Trackplan. This will allow these documents to viewed within the application. And to allow the user to draw / annotate over these.
API – so clients can pull data from Trackplan and write data into Trackplan from their own systems
Room and asset booking

Electronic forms – already a strong feature in Trackplan. You can build your own forms. We will extend this to offer:

- dynamic question workflow – questions will appear dependent on the answer to another question
- form completion workflow – one user completes one section of form, then second user completes next section. Great for permits to work

Health and Safety Module. We already have many features that provide health and safety aspects such as contractor compliance, design your own electronic forms, risk assessments, permits to work. This module would bring these together

Integration with other finance systems. Likely to include Sage, Quickbooks, Microsoft Dynamics, SAP

More dashboard components and reports. This will never end....

What is Trackplan?

Trackplan is a flexible facilities management solution with dedicated mobile apps for engineers, managers and requestors. It has strong scheduling capabilities and excels at multi-site, multi-team operations.

Who Should Use Trackplan?

Organisations with:

- 10+ users
- 150+ jobs per month
- A budget of at least £2,500 per annum
- Large sites or multiple sites

Organisations looking for:

- A web-based, app-driven facilities management solution
- A solution capable of managing a high volume of external contractors

ORGANISATIONS FROM

Retail

Facilities/Property Management

Universities and Colleges

Food Manufacturing

Hospitality

 Compare

 Shortlist

 Make Note

Key USPs of Trackplan

1 Core FM Functionality for an Attractive Price

Manage assets, job requests, inspections, reactive maintenance and planned maintenance site compliance status and engineer performance in real-time. Coordinate inter-contractor activity across numerous sites and multiple regions.

2 Dedicated Apps for Job Requestors, Engineers and Managers

Utilise progressive web apps tailored to requestors, contractors and engineers, and facilities managers. Live-track engineer and contractor locations and access assets via QR codes.

3 Connect Sites, Assets, Forms and Maintenance Activities

Build links between comprehensive site records, asset records, a form library and maintenance programmes. Allocate assets to sites. Connect sites with maintenance programmes. Build maintenance programmes for specific assets. Allocate maintenance tasks to a distributed workforce.

4 Powerful Job Management and Scheduling Views

See scheduled work on a drag-and-drop calendar, as a Gantt chart, or as maintenance program-focused and task-focused lists. Apply multiple filters to views and lists—including site, type, status, assignee and priority—and export filtered work lists for printing and sharing.

5 Quickly Create, Share and Report on Custom Electronic Forms

Build bespoke, logic-driven forms for inspections, assessments, readings and checklists. Associate forms with sites, assets, locations and jobs, share them with in-field teams, external contractors and customers, and easily analyse results.



⦿ Compare

☰ Shortlist

✎ Make Notes about T

Client contracts – allocate sites, SLAs, contractors, margins by contract

Contracts Details

Default Team Not Selected

Currency

Xero Organisation Name

Number of Sites 1

Contracts Logo

Resources All Resources Selected Resources Only

Excluded Resources

Resource Name

Full Contact

No Resources Selected

[? Help](#)

Priorities All Priorities Selected Priorities Only

Selected Priorities Grid

Priority Name

Response Time (Hours)

Nearly Due (Hours from Due Date)

No Priorities Selected

[? Help](#)

Sales Margins %

Sales Labour Margin 0.00

Sales Materials Margin 0.00

Smart allocation of jobs to contractors by job type and region

New Job - Required Job Information: Save

Job Details

Test job

Site Name: 13:46 test

Reported By: mark

Priority: Emergency

Job Type: Coffee Machines

Sub Type: (please select)

Resource: No resource auto-selected. Choose one on the job details page once the new job is created.

Assign to User: Facilities Manager

app3res Resource Name | Resource Address | Available Availability Status | Pending Compliance Status

Details | **Regions & Trades** | Portal & App | Documents | Qualifications (4) | Availability | Contacts | Forms | Billing | Stock | Custom Fields

Back

Trades

Trade Name

No Trades

0 | 10 Items per page | No Items to display

Regions

All Regions Selected Regions Only

Selected Regions

Region ▼ Parent Region ▼ Country

Select Regions from Edit page

0 | 10 Items per page | No Items to display

Rankings and Job Allocation Rules

Default Ranking

Job Costs, Sales, Contractor Quotes and Sales Quotes

Edit Cost

[Delete](#)
[Put Under Query](#)
[Save as Invoiced](#)
[Save](#)
[Close](#)

Invoice #

Invoice Date 

Cost Breakdown

Materials 0.00

Labour 0.00

Call-Out 0.00

Net Total 0.00

Job Budget 0.00

Created 15/03/2021 14:28

Created By

Cost Status Pending

Budget Value 0.00

Remaining 0.00

Finance Code 1

Finance Code 2

Finance Code 3

Sales Invoice No.

Sales Invoice Date 

Sales Materials 0.00

Sales Labour 0.00

Sales Other 0.00

Sales Value 0.00

Ready to Send

Sales Invoice Sent

Sales Quote Details



[+ New](#)
[Facilities1](#)


Sales Quote Details

[Back](#)
[Decline](#)
[Approve](#)
[ReOpen](#)

Sales Quote Reference	ABC
Sales Quote Status	Sent
Currency	EUR
Quote Number	2509-001

Description Refurb	
Date Created	26/03/2021 13:13
Date Sent	26/03/2021 13:14
Sales Quote Document	sales quote - 2509-001.pdf
Date Approved	
Date Rejected	

Contractor Quote	
Contractor Labour Cost	
Contractor Materials Cost	
Contractor Other Cost	

Sales Quote Mark-Up %	
Sales Labour Mark-Up	
Sales Materials Mark-Up	
Sales Other Mark-Up	

Sales Quote Value	
Sales Labour Value	1,000.00
Sales Materials Value	700.00
Sales Other Value	0.00

Quick links on job list and job calendar for ease of navigation. Jump to your favourite view of the job calendar to show jobs by your team.

The screenshot shows the top navigation bar of the FILTERTEK system. On the left is the FILTERTEK logo. In the center, there is a notification bell icon with the number '8' and a '+ New' button. To the right, it says 'Facilities1' and a user profile icon. Below this, a dropdown menu is open, listing several options: 'Change Password', 'Scan QR Code', 'App Manager', 'Diary Entries / Notes', and 'Log Out'. At the bottom of this menu, there are two sections of quick links: 'CALENDAR QUICK LINKS' (highlighted in blue) containing 'Dimo Jobs by Week', and 'JOBLIST QUICK LINKS' (highlighted in green) containing 'Castle View Overdue'. A '281.50' value is visible in the top left of the menu area, and '49,358.50' is visible in the top right. A 'to departments' link is also visible on the left side of the menu.

The screenshot shows the job calendar interface. At the top, there are several filter sections: 'Reactive / Planned' with a dropdown set to '<All>', 'Open / Closed' with a dropdown set to '<Open / Closed>', 'Status' with an empty input field, 'Priority' with an empty input field, and 'Contract' with a dropdown set to '<Contract>'. Below these are 'Clear' and 'Q More' buttons, and a 'Selected' dropdown set to 'Dimo Jobs by Week'. A toolbar below the filters includes a 'Drag Jobs Onto Calendar From Job List' button, and three view options: 'Show By Date', 'Group By Assigned User', and 'Group By Resource' (which is selected). The calendar header shows 'TODAY' with navigation arrows, a date range '21/03/2021 - 27/03/2021', a search bar, and view mode options: 'DAY', 'WEEK' (selected), 'WORK WEEK', and 'MONTH'. The calendar grid has columns for days of the week (S... 2... to T... 2...) and rows for time slots ('all day', '08:00', '09:00'). The grid is color-coded by resource: Francols (yellow), Francols (purple), Fred Smith (green), and Plumbing Works (blue).

Send Electronic forms by email to remote user. No login needed.

Form Details



+ New

Facilities1



A v1.6
Form

2581
Job No.

Cefni Hospital let
Site

first floor
Location

Submitted 22/03/2021 09:22

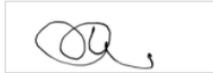
← Back

✉ Send Another

Last Sent To: mark@trackplanfm.com
Sent date:22/03/2021 09:20
Last Accessed:22/03/2021 09:22

Main

Signature



TEXT BOX

aaaa

A?



Fri 26/03/2021 11:03

s.dissanayake@gyroscopetx.com

COVID-19 Disclaimer sent to you from Gyroscope

To s.dissanayake@gyroscopetx.com; trackplan@trackplanfm.com

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

COVID-19 Disclaimer sent from Sandamali Dissanayake, Gyroscope.

Please click this link or copy into your browser <https://app3.trackplanfm.com/headoffice/RR3695x7r/RR159032gY5h?ggy28=025cc4d2-7827-469d-94c0-3fc36f561f27>

Form Name: A

Main

Signature



TEXT BOX

aaaa

A?

Pass

Fail

Contractor Dashboard, contractor quote list in the contractor portal. And can now send email link to contractor with no login required.



Quote Status: Reactive / Planned:

No.	Description	Ref.	Site	Status	Requested For
2545-001	Request for quote / estimate fr		Building No 15:36 r4	Submitted	15/01/2021 12:46
2450-002	Request for quote / estimate fr		Castle View cc8	Pending	18/06/2020 10:59
2441-001	Request for quote / estimate fr		Cefni Hospital let	Approved	09/06/2020 15:54
2315-001	Quote for cleaning/disinfection	Quote reference	Building No 15:36 r4	Pending	09/12/2019 16:31
1942-001	Request for quote / estimate fr		Building No 15:36 r4	Approved	25/01/2019 15:14
1134-001	Request for quote / estimate fr		Kydd Building k1	Submitted	26/07/2018 10:01

**Apps – navigate through sites, locations and sublocations with ease.
Resource Availability**

Trackplan^{FM} Manager App

Email
danielstorey533@gmail.com

Password
.....

LOGIN

OR

LOGIN WITH MICROSOFT

[FORGOTTEN PASSWORD](#)

Settings

felix2@felix2.com	8.0.0
Resource Email	App Version
Resource Availability	
Available ▾	
	

CHANGE PASSWORD 

RELOAD APPLICATION 

LOGOUT 

Apartment 21

Apartment 21

Site Name

ap21	Normal site
Site Code	Site Type
Main Contact	Telephone Number

Address

Generic Region	Town
Region	

ap21	
QRCode	

VIEW LOCATIONS 

VIEW JOBS 

RAISE JOB 

VIEW ASSETS 

CREATE ASSET 

Custom Labels and foreign language capability

Details melding



1316

Job Request No.

AALTER
STATIONSSTRAAT
20

Gebouw

Approved

Status

Verlichting werkt
kantoor in Aalter.
de lamp het dichte

Details

Details

Documents

Assets

Omschrijving

Verlichting werkt niet goed in de wachtzaal/loket en keuken van het kantoor in Aalter. In de wachtzaal is het grote vierkant en in de ke de lamp het dichtsbij de wasbak

Gebouwcode

AALT

Gebouw

[AALTER STATIONSSTRAAT 20](#)

Gebouwdeel/verdieping

Lokaal

Job type

Administratie

Job subtype

Melder

lieven.dewilde@bondmoyson.be
Dries Schouppe

Melder e-mail

dries.schouppe@bondmoyson.be

Transport Jobs for Emergency Services

Create a New Transport Request



+ New

desk1



New Transport Request:

Job Type

Reported By Name

Reported By Email

Main

Is an Ambulance Required

Yes No

Is Patient fully mobile?

Yes No

Is assistance required to mount/dismount vehicle?

Yes No

Journey 1 - Task Number 28-001

Back

Save

Pick Up

Address 1

Address 2

Town

Postcode

Pickup Time

Pickup Window (hours)

Destination

Address 1

Address 2

Town

Postcode

Arrive Time

Vehicle Type Other Information