Trackplan FM

Release 31st May 2021

Recently Done

- Code & Name formats in some detail views
- Cosmetic improvements on Asset Tree View
- Required setting in Job Note Types
- Restricted sites for Users (Manager App)
- Job Notes improvements (Manager App)
- Edit assets and site list filters (Resource App)
- Person who raised request on remote web page (No Login) will receive email when Job is complete.
- Bug fixes

Coming Soon

- Requestor App
- Contractor sign in and out with QR Codes
- Can add multi-resources to a planned schedule
- Improvements to Expiry reminders for custom date fields
- Big improvements to assets, stock and purchase orders for more manufacturing-oriented clients
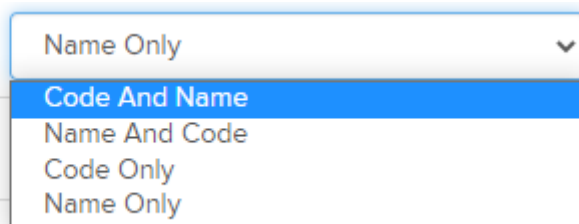
Manager App on v10.2.0 (New Release)
Resource App on v10.2.0 (New Release)
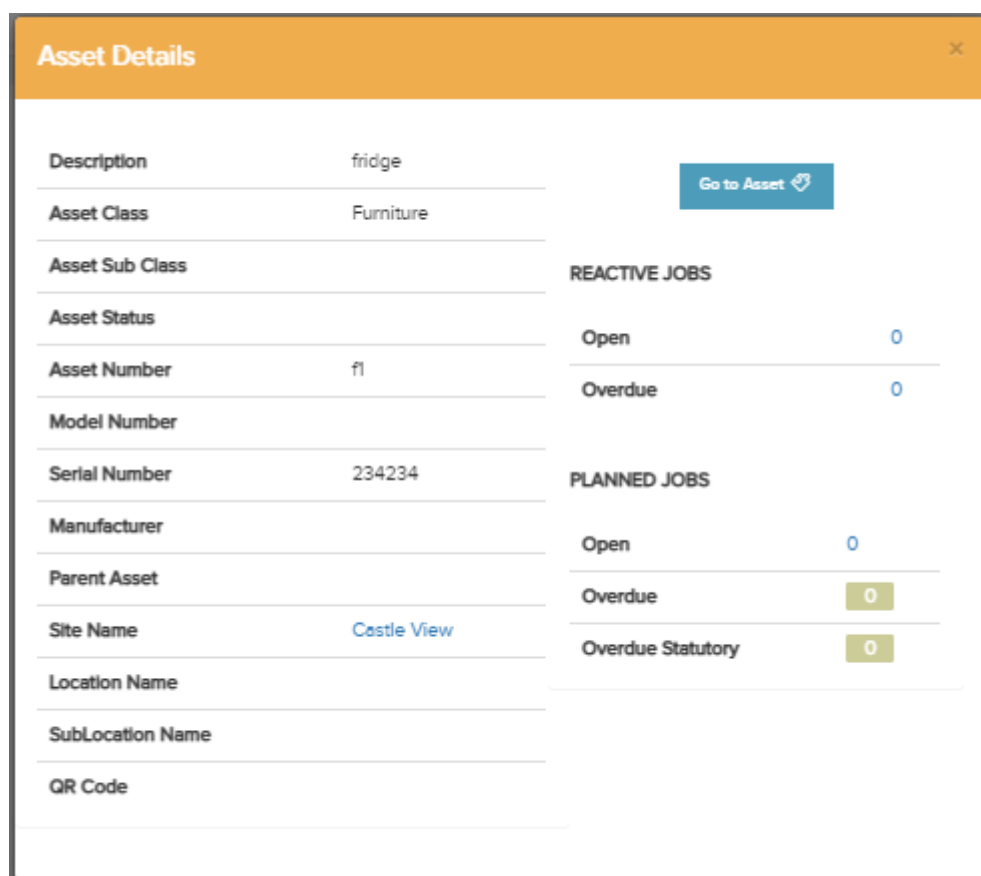
Work done for May 31ˢᵗ 2021 Release

Recently Done - Main Changes

Code & Name formats in some detail views – A quick overview on this one. In User – General Settings – Display Settings, you have 4 options for how you want the information to be displayed in the filter dropdowns. In this release the option setting value has been brought into some Details Views such as the Asset Details view. Also, all grids now include the Code as a separate column.
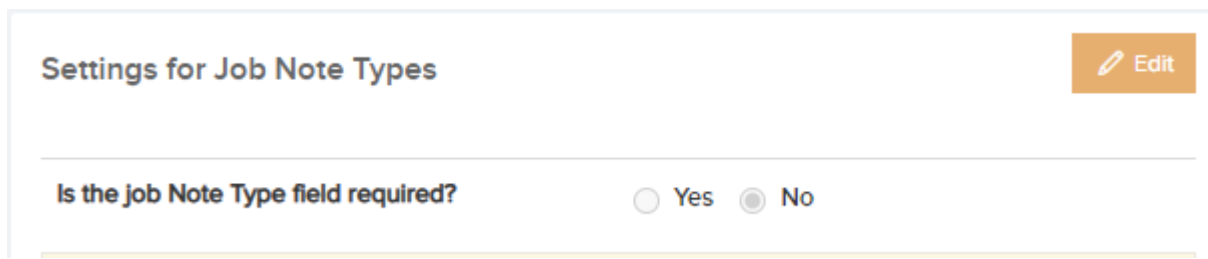

Cosmetic improvements on Asset Tree View – Some nice improvements here. Clicking on any Site, Location, Sublocation or Asset will now bring up a pop-up modal to make all details more visually accessible.

Required setting in Job Note Types – A new setting here in the 'Job Note Types and Note Groups' area. This is just a simple required setting. Change to Yes to make the Note Type field required when creating new job notes or job task notes.

Settings for Job Note Types   [Edit]

Is the job Note Type field required?   ○ Yes   ● No

Restricted sites for Users (Manager App) – A very important improvement here. Now in the Manager App, the User will only see the sites they are authorised to see.

Job Notes improvements (Manager App) – Another important Improvement in the Manager App. If the User only has access to Public Notes, then that user will only see public notes that are sent down from main application to manager app.

Edit assets (Resource App) – Like in the Manager App, you now have the ability to edit assets from the resource app. Very handy feature for internal or external contractors on site to update assets on the go.

Person who raised request on remote web page (No Login) will receive email when Job is complete – A nice new addition to the product to insure everyone is kept up to date with requests/issues raised.

Bug Fixes

PPM reminders are not working for Planned Schedules. NOW FIXED

Coming Soon

Requestor App – With 2 new developers starting very soon this major feature to our product will be getting the green light and will be a great help to a lot of our clients.

Contractor sign in and out with QR Codes – Each Job or Job task will soon have its own QR code and will be available on all Apps and emails sent out. Very

handy for contractors showing up on site. Just show the QR code to the person at the front desk, he or she will scan the code and that will sign the contractor in and out. It will also keep records of times spend on site.

Can add multi-resources to a planned schedule – Like in each reactive job now, you will soon have the ability to add multiple resources to Planned Schedules.

Improvements to Expiry reminders for custom date fields - Notifications are always important so we plan on improving this very soon.

Big improvements to assets, stock and purchase orders for more manufacturing-oriented clients – Driven by existing clients. We have got great feedback and ideas to improve these areas.