



Release 27th June 2021

Recently Done

- 6 new miscellaneous fields for Assets
- Further Works and Duplicate buttons for Job details
- 15 PPM (Planned Schedule) Columns now in the Site Upload
- Contract Report in Reports Area
- PPM Schedule Upload in the Upload centre
- Choose and asset when Creating Job or Request
- Associate a Team to a Location or Sublocation
- Enhanced email notification for Job Requests
- Contractor sign in and out with QR Codes
- Site list filters in Resource App

Coming Soon

- Requestor App
- Can add multi-resources to a planned schedule
- Big improvements to assets, stock and purchase orders for more manufacturing-oriented clients
- Approve requests in the Manager App

Manager App on v10.2.0 (New Release)

Resource App on v10.3.0 (New Release)

Work done for June 27th 2021 Release

Recently Done - Main Changes

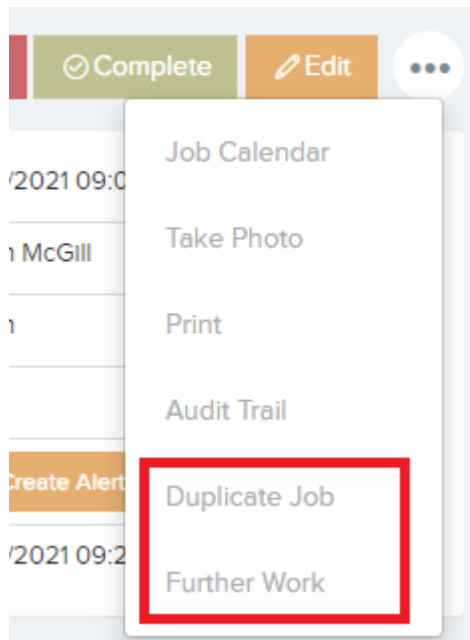
6 new miscellaneous fields for Assets – When creating or editing an asset there are now 6 new fields, 3 dropdowns and 3 free text areas. Great for capturing more information about that asset. The dropdowns can be populated in the settings area by clicking ‘Asset Dropdowns’ (Below screenshot).

Asset Dropdowns

Lets you create custom Dropdowns for Assets.

And don't forget, the label name can be changed by clicking ‘Custom Field Names/Labels in the settings area.

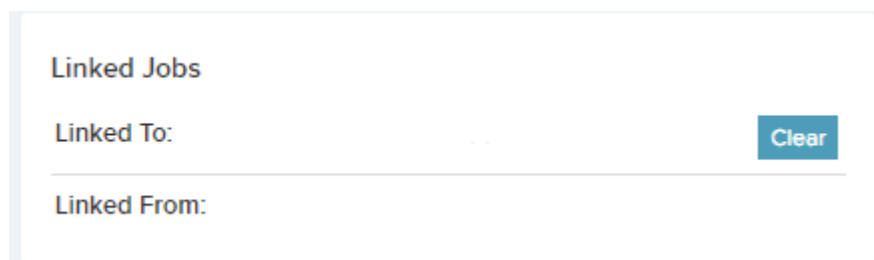
Further Works and Duplicate buttons for Job details – A great double feature here in the Job Details page. As per the below screenshot, click on the triple dot button to access the 2 new features.



Duplicate Job – By clicking this it will create a new identical job and populate all the major fields like, site, location, sub location, assigned user, team contract and asset. The new Job Status will be Pending.

Further Work – By clicking this it will bring you to the ‘Create a New Job’ page. All major fields like site, location, sub location, assigned user, team contract will be prepopulated. ‘Further Work Required’ will appear in the Job details also.

Click 'Save' and a new job is created. A note will be generated and appear in the Job Notes and most importantly the original Job number will be recorded in the Linked Jobs area as seen below.



Linked Jobs

Linked To:

Linked From:

15 PPM Columns now in the Site Upload – A nice upgrade to the Site Upload.

You now have the ability to attach 15 Planned Schedules to sites when using the Site Upload in the Upload Centre.

Contract Report in Reports Area – Another nice upgrade to the Reports area. 2 new Reports added to view contract jobs either weekly or monthly.

Reports List

Report Name

Jobs by Contract - Monthly

Jobs by Contract - Weekly

PPM Schedule Upload in the Upload centre – An exciting new addition to the list of templates in our Upload centre. The 'Planned Schedule Template' gives the user the ability to upload numerous Planned Schedules to the system in one go. You can then link assets or sites to the planned schedules using the asset or site upload.

Create Job or Request against an Asset – Another nice new setting here. The User will be able to turn on the ability to select an asset on both the new job and new request page. This new setting can be found in Settings -> Job Settings & Settings -> Job Requests titled 'Ask for Single Asset'. Great for asset focused organisations

Associate a Team to a Location or Sublocation – Like in the Site Details you can choose a Default Team, for that site, you now have the ability to choose a Default Team to a Location and Sublocation.

When a job or request is created against that location or sublocation the job or request will then be allocated to that team.

Enhanced email notification for Job Requests – A nice upgrade to the User Email & Notification Settings here. You now have 3 options relating to receiving an email when a request is created.

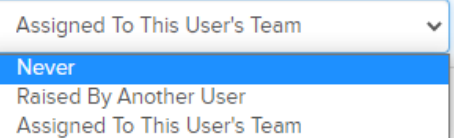
Never receive an email,

Receive an email when the request is created by another user,

Receive an email when the request created is assigned to that users team.

Request Email Settings

Receive Email When Job Request Created By Another User



Contractor sign in and sign out with QR Codes – A big features here driven by current clients.

1. A unique QR Code can be generated for an instructed job to a resource.
2. This unique task QR code can then be sent to the engineer or contractor via email and will appear on the task page for the Resource app or Contractor Portal.
3. When the Resource arrives on site the Security officer/Receptionist/Site Forman can scan the QR Code by clicking on 'Scan QR Code' in the dropdown in the top right corner of the main application.
4. This will bring them straight to the Task details page and update the 'Start Task' date.
5. If the QR Code is scanned a second time it will update the 'Left Task' date.

Instruct Resource - Step 2

Send Email Send SMS Enable QR Code

To: sales@trackplanfm.com

CC:

Subject: New Job Task [Task number] from Staging at site: Castle View.

Body:

B *I* U ↻ ↺ A ▼ 🔍 ▼

Order Number [Task number]
From: **Staging**

Enable QR code for this task on instruction

Task Details

Assigned	- Darren McGill
Created	25/06/2021 12:03
Created By	Facilities Manager
Exp. Date	25/06/2021 12:01
Exp. Duration	2.00
Email To	sales@trackplanfm.com
Email Subject	New Job Task 3682-001 from Staging at site: Castle View.
Date Email	25/06/2021 12:03

[Resend](#)


Accepted

Travel Start

Start Task

Left Task

Arrive Home

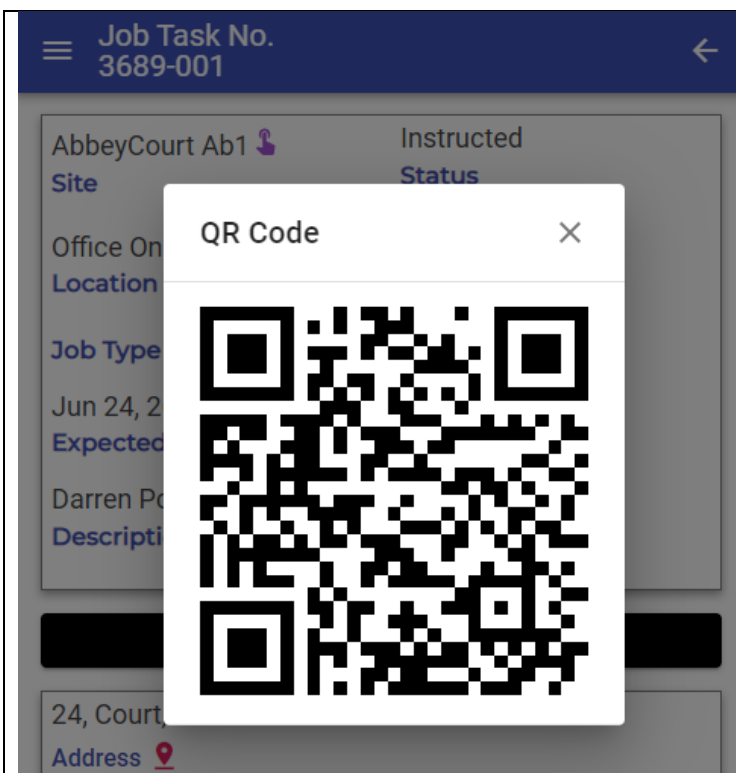
Requires Permit No 

QR Code No Enable QR Code

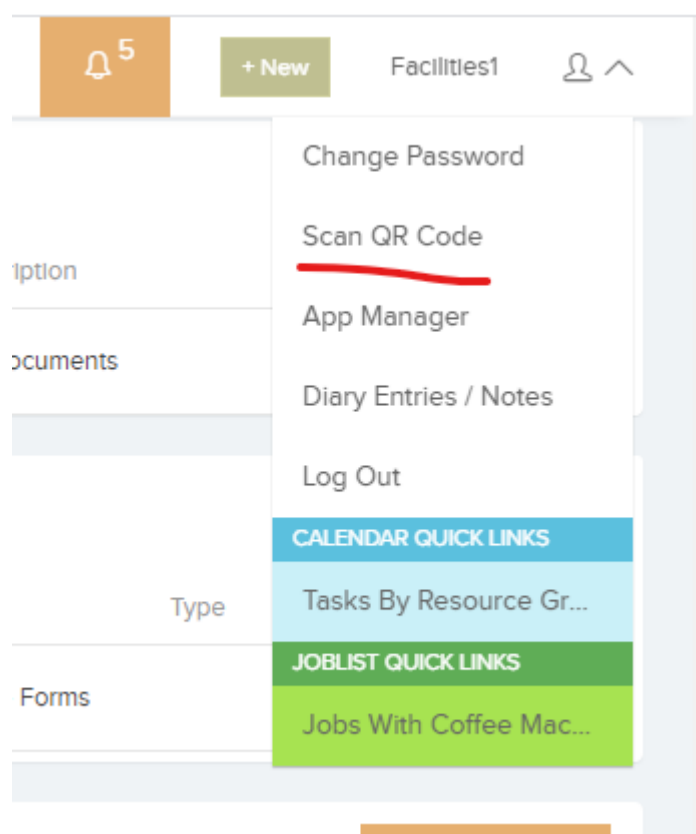
Task Notes

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Enable or disable QR code for this task from task details



View QR code in Resource App (or contractor portal) ready for scan



In main application scan the contractor's QR Code from the email, resource app or contractor portal. This records the scan and takes the user (for example security, reception) to the task detail page.

Site list filters in Resource App – Like in the Manager App, the resource/contractor using the Resource App now has the ability to filter the Site List.

Coming Soon

Requestor App –The 3rd app to complement the Resource App for engineers and Manager App for supervisors and managers. This 3rd app will let users quickly and easily create a job request when they spot an issue in the building. And they will be able to take photos of the issues.

Manager App – approving requests. You will be able to approve requests into reactive jobs in the manager app. And with existing functionality you can then choose the resource and allocate the job. A great tool for managers who are out and about in their buildings and not near their desktop. It will also complement the new Requestor App.

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. So planned jobs created can be instructed to multiple engineers or contractors.

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

- be able to manage stock levels from the apps. And you will be able to associate QR codes to storage areas such as bins or buckets to bring up the stock location straight away.
- asset stock. You will be able to set required stock levels and stock in use for each asset.
- purchase order authorisation levels – you will be able to have multiple levels of authorisation for your purchase orders
- purchase orders. Greater control over when purchase order numbers appear. You will also be able to set your own purchase order numbers (eg prefix)