



Release 23rd August 2021

Done in this release

- Ability to design your own E-Form PDF report/Certificate.
- Approving requests on Manager App.
- Custom date filters for reports.
- Planned Maintenance Timeline Report. Speed and interaction.
- Stock reorder level notifications. Can now use Team.
- Contractor can flag job costs as “Costs Finalised” on contractor portal
- Expected Complete Date added to Job Requests and Job Tasks
- New Priority Job Summary & Jobs Created Summary by Status.

Coming Soon

- Multi language versions of Trackplan.
- An API for Trackplan.
- Requestor App. Work has started. Looking good.
- Sales quotes and contractor quotes. You will be able to create quotes without being connected to a job. Currently, you have to create a quote on a job.

*Manager App on v10.5.0 (New Release)*

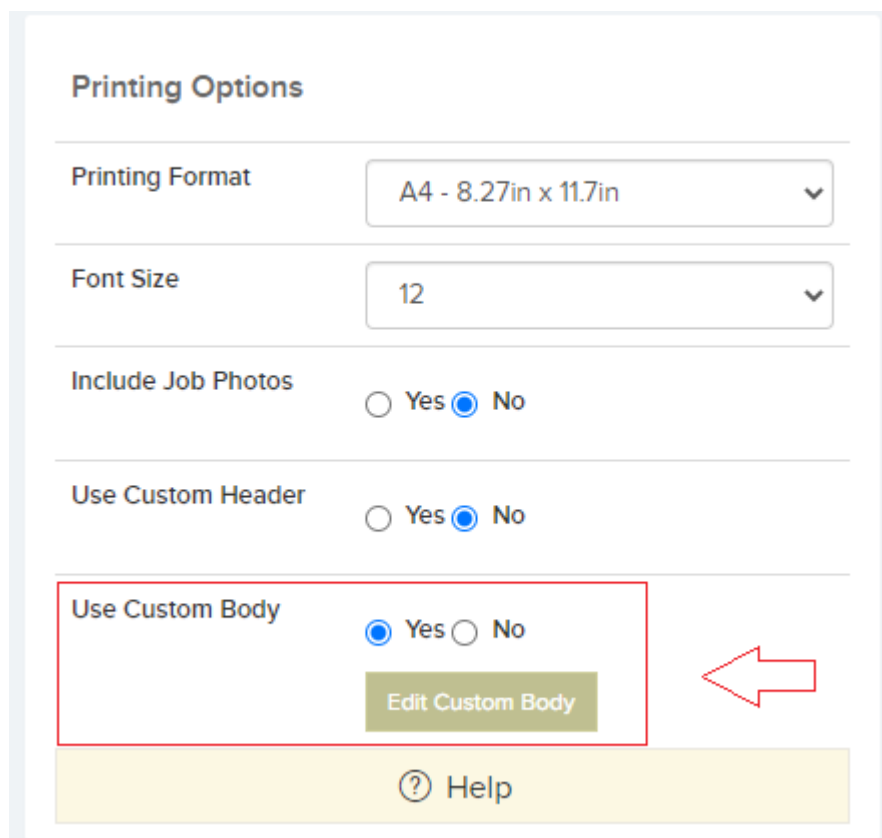
*Resource App on v10.5.0 (New Release)*

## Work done for this Release

**Ability to design your own E-Form PDF report/Certificate** – The first major feature in this release is a great tool and will be used by many. You now have the ability to design how the form answers will be displayed and printed in PDF. The Form Questions grid now has a new column – ‘Tag’. Create a unique tag for each question.

When editing a form set the ‘Use Custom Body’ setting to Yes. A new button will appear. Clicking this button will reveal a pop-up where you can then design your own PDF report/certificate.

The question tags you created earlier in the Form questions grid will appear in the Help section. You can insert the tags which will be replaced at run time with the actual answers.



**Printing Options**

Printing Format: A4 - 8.27in x 11.7in

Font Size: 12

Include Job Photos:  Yes  No

Use Custom Header:  Yes  No

Use Custom Body:  Yes  No

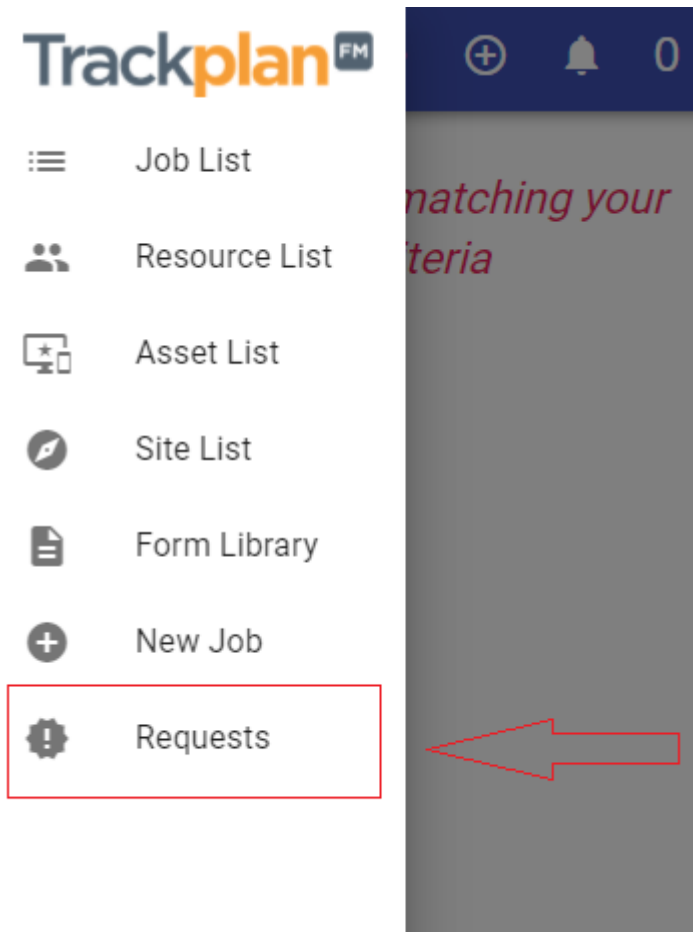
Edit Custom Body

Help

**Approving requests on Manager App** – Next feature will be very useful for users of the Manager App.

Job Requests created by user are now available for approval on the Manager App.

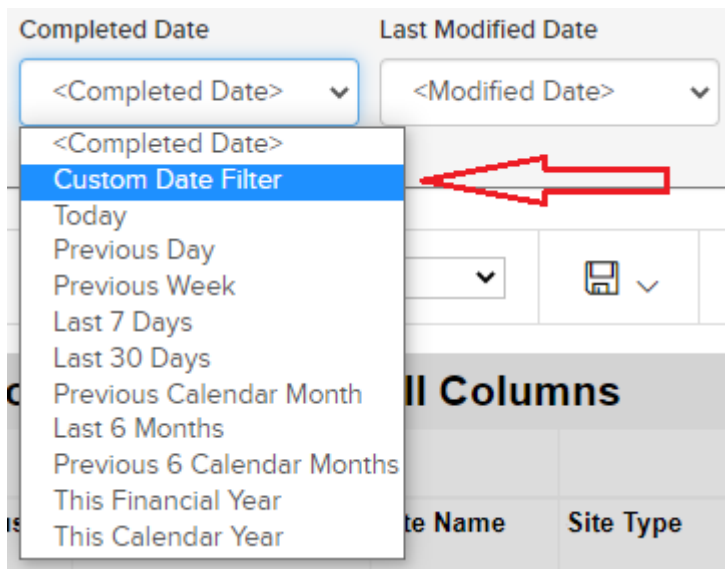
1. In the side bar menu click on Requests to see the list of pending Job Requests.
2. Click on the job request that needs approval
3. Click Approve Request – (This will bring you to the 'Create New Job' screen where information from the request will be prepopulated.
4. Click 'Create'



Also, two additional settings for the User in relation to requests. The 1<sup>st</sup> one can be found in 'User General Settings' and the 2<sup>nd</sup> one in 'User – Manager App Settings'

1. Can Approve and Decline Requests - If set to no, this user will not have the ability to approve or decline requests, but they can still see them.
2. Can See Job Requests - User of the Manager App can view and approve requests. Requests shown on the manager application will only be from those raised in the last thirty days.

**Custom date filters for reports** – In the reports, all date filters now include an extra option – ‘Custom Date Filters’. This has been much requested.



Clicking on this will produce a pop-up where you can choose your ‘From’ and ‘To’ dates. Click ‘Confirm’ and run the report again.

A screenshot of a 'Custom Date Filter' dialog box. The dialog has an orange header with the title 'Custom Date Filter' and a close button (X). Below the header, there are two input fields: 'Custom From Date' and 'Custom To Date'. Each field has a calendar icon on the right side. At the bottom of the dialog, there are two buttons: 'Cancel' (with a close icon) and 'Confirm' (with a play icon).

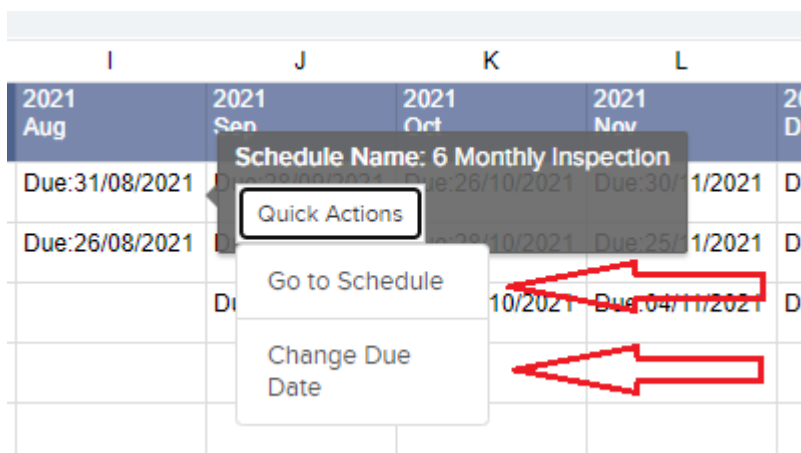
**Planned Maintenance Timeline Report** – This nice Gantt style reporting area for PPMs has always been in the system but now the speed at which the reports can be generated has been greatly improved (100 times faster!)... ..and also you are not limited to how many planned maintenance rows you want to see.

Filters along the top help you narrow down your search before running the report. I.e. – by Start date or Site.

A nice new feature now is the ability to either go directly to that Schedule or Change the Due date. These 2 new options under the 'Quick Actions' button will hopefully help the user in their day-to-day management of PPMs.

Just hover over any Date field and the 'Quick Actions' button will appear.

Don't forget that this report can then be exported to excel via the triple dot button in the top right of your screen.



### **Stock reorder level notifications. Can now use Team.**

In the previous release we let you add multiple emails to stock lines and storage areas, to receive email notifications when stock levels fall below reorder levels. Some clients were quick to tell us that it would be useful to allow a team to be assigned to a stock or a stock level. So any user in this team can receive a reorder level notification. This has now been done.

### **Contractor can flag job costs as “Costs Finalised” on contractor portal**

In the contractor portal, contractors can view and manage their instructed / allocated job tasks. And they can also add costs to the jobs.

We have now added a “Costs Finalised” button on the Task Details page which appears after the contractor completes the task.

3726-001 11111111

Job Task No. Site

Task Detail Documents

Costs Finalised

No.	3726-001
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When the contractor clicks this, the task status is changed to “Completed – Costs Finalised” and the main job status will have its sub status changed to “Costs Finalised”. You can then report on these jobs in the main application where the costs are complete from the contractor’s perspective.

### **Expected Complete Date added to Job Requests and Job Tasks**

For many months we have had an Expected Start Date and an Expected Complete Date on the job details page. This is a big help for managing job performance.

In this release we have made the Expected Complete date also available to job requests and also to the job tasks.

### **New Priority Job Summary & Monthly Volume Check Reports – Two important new reports here in this release.**

1. Priority Job Summary - This will show Completed and created jobs by priority. Don’t forget once you run the report you can filter the response and run again. You can also save the filters or save as a new report.
2. Jobs Created Summary by Status– This will show in a list and also on a pie chart all jobs created for a given time period broken out into:

WIP - jobs created but not completed,

Accrual - jobs completed but not yet invoiced (i.e., a sales invoice has not been raised)

Invoiced - Jobs completed and a sales invoice has been raised.

Within The Last Month	
<b>Monthly Jobs</b>	<b>15</b>
WIP	12
Accrual	2
Invoiced	1



Number of Jobs



■ Accrual  
■ Invoiced  
■ WIP



Don't forget, like all reports these can be scheduled to be sent via email in either excel, PDF or word format.