



Release 14th September 2021

Key Features & Improvements:

- Item 1. Smart routing of Jobs to Teams based on job type and site.
- Item 2. Sales quotes. You will be able to create sales quotes without being connected to a job.
- Item 3. Purchase Order – Can easily add costs from completed job tasks for that contractor to their Purchase Order.
- Item 4. Auto-Archiving of Jobs using rules you set up.
- Item 5. Resource Report Document Tag – force contractors to upload a job report to a task before they can complete it.
- Item 6. Emails to contractors: New Public Notes tag for Instruction to contractor Email.
- Item 7. For Transport Jobs- Pickup and Destination address in resource app, email and SMS template

Coming Soon:

- Item 1. Requestor App. Job Requests can be created easily from the app from users and guests (e.g., tenants and residents).
- Item 2. Job booking – job contacts (such as residents) can choose when they want the engineer or contractor to visit.
- Item 3. Dashboard – big improvements to the filters and more....
- Item 4. Multi language versions of Trackplan.
- Item 5. An API for Trackplan.

Manager App on v10.5.0

Resource App on v10.6.0

Work done for this Release

Item 1: Smart routing of Jobs to Teams based on job type and site

Why is it useful? This new improved smart routing feature allows newly created jobs to be assigned to a Team or Assigned User based on the Job Type / Sub Type and where the job is located (site / location / sublocation)

This new feature can be set up in *Settings – Advanced Job to User and Team Routings*.

Advanced Job to User and Team Routings

0

+ New

Facilities1

Planned/Reactive

<Planned/Reactive>

Job Type

<Job Types>

Job Sub Type

<Job Sub Types>

Site

<Sites>

Location

<Locations>

Sub Location

<Sub Locations>

+ ADD ROUTING

Planned/Reactive	Job Type	Job Sub Type	Site	Location	SubLocation	Assigned User	Team	
			Haddenham & Thame Parkway			Facilities Manager		<div></div> <div></div>
			Sparkie Towers			Facilities Manager		<div></div> <div></div>
			sajjth test 8				Dimo	<div></div> <div></div>
			PROC Site	A Test Floor 1			Nykobing	<div></div> <div></div>
Reactive	Electrical	Wiring					Plumbing	<div></div> <div></div>

Click on ‘Add Routing’ to reveal a pop up where you can configure all the information in each row. As per screen shot below:

New Job to User Team Routing

Planned/Reactive

<Planned/Reactive>

Job Type

<Job Types>

Job Sub Type

<Job Sub Types>

Site

<Sites>

Location

<Locations>

Sub Location

Cancel

Confirm

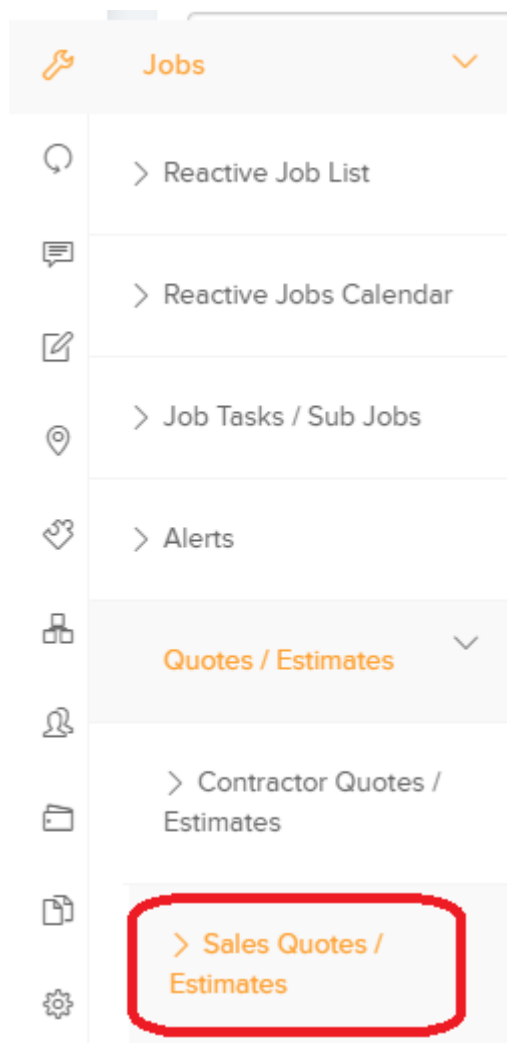
This new advanced feature can be set up for Planned or Reactive Jobs for a certain Job Type, Job Sub Type, Site, Location, Sublocation, Assigned User or Team.

Item 2: Sales quotes. You will be able to create sales quotes without being connected to a job

Why is it useful? Before, all Sales Quotes were generated within a Job. Now this new feature allows you to have a stand-alone Sales Quote with an option to create a new Job one the sales quote is approved.

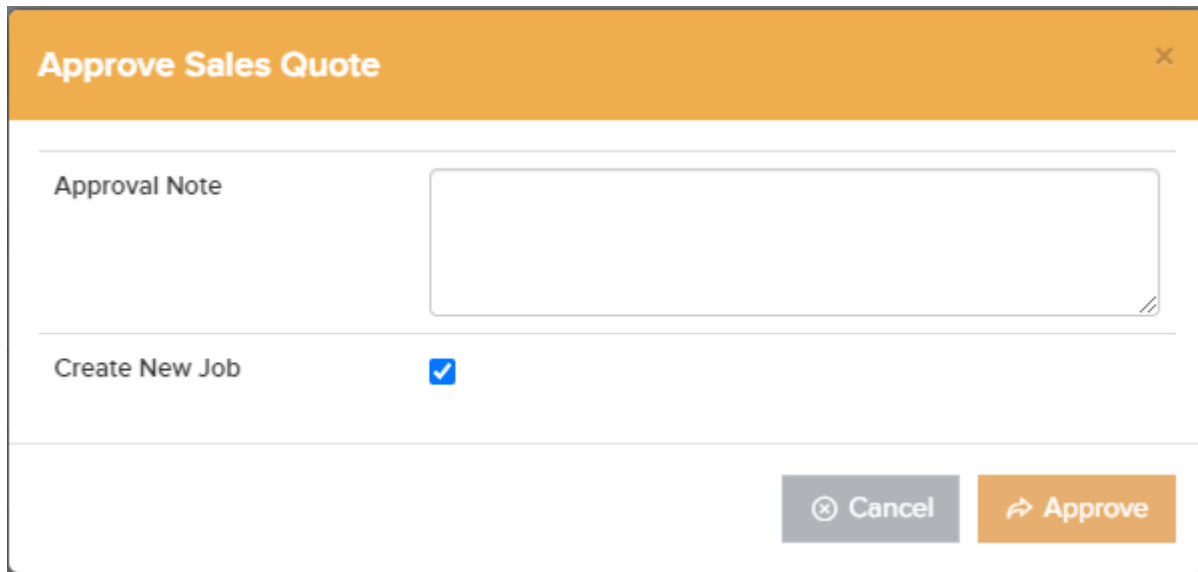
You now have the ability to create a sales quote on its own without needing it to be associated to a first created against a job. Once the sales quote has been approved it can then be connected to a job. This new job will have the approved sales quote attached to it and will automatically be classed as a revenue job.

The new Sales Quote Grid can be found in the Sidebar under Jobs – Quotes / Estimates.



This will bring you to the Sales Quote list with all our usual grid options, like filters along the top and the Excel Export button available via the triple dots.

Here you can Create a 'New Sales Quote' and send for approval. Once it is approved you will get the option to 'Create New Job'.



The screenshot shows a modal dialog box titled "Approve Sales Quote" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Approval Note" with a large, empty text area for input. Below this, there is a section labeled "Create New Job" with a checked checkbox. At the bottom right of the dialog, there are two buttons: a grey "Cancel" button with a close icon and an orange "Approve" button with a checkmark icon.

This will bring you to the Create a New Job screen. Click Save and the New job will be created with the Sales quote attached.

Item 3: Purchase Order – Can easily add costs from completed job tasks for that contractor to their Purchase Order

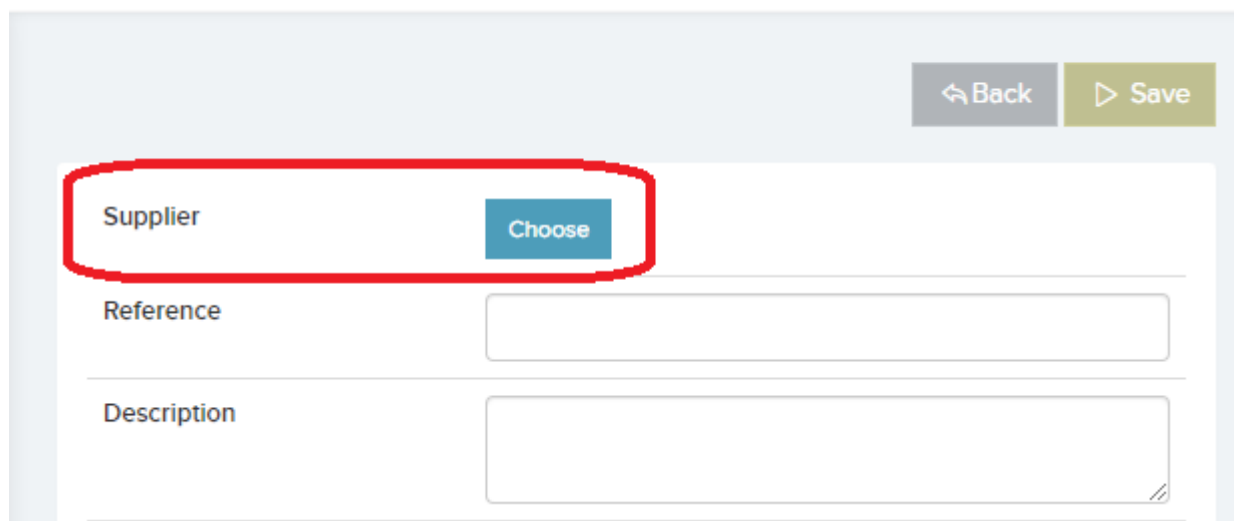
Why is it useful? A useful feature for clients using external contractors to be able to attach the completed contractor costs to a Purchase Order

Another great feature in our Purchase Order / Material Request Module. For Clients that want to add the contractor costs for their completed tasks to a new Purchase Order.

You will be able to add the costs from one or more job tasks that are at the status "Complete - Costs Finalised" to the PO.

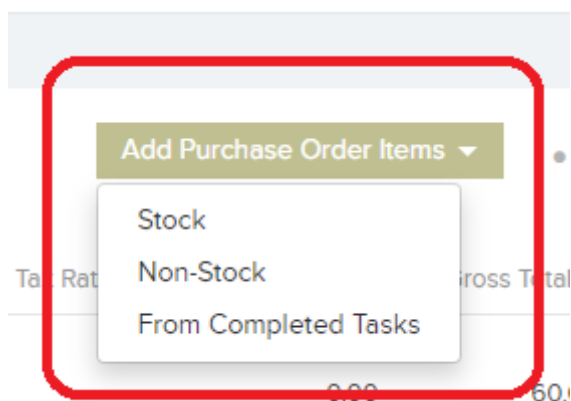
1. Choose your Supplier/Resource/Contractor when creating a new PO.

Create Purchase Order



The screenshot shows the 'Create Purchase Order' interface. At the top right, there are 'Back' and 'Save' buttons. The main form has a 'Supplier' field with a 'Choose' button next to it, which is highlighted by a red rectangle. Below the 'Supplier' field are 'Reference' and 'Description' text boxes.

2. When adding a purchase order item to the PO select 'From Completed Tasks'



The screenshot shows the 'Add Purchase Order Items' dropdown menu. The dropdown is open, showing three options: 'Stock', 'Non-Stock', and 'From Completed Tasks'. The 'From Completed Tasks' option is highlighted with a red rectangle.

3. A new Pop-up list appears with the costs from all completed tasks by that contractor. You can then add these to the purchase order.

Purchase Orders can then be sent to your Finance Team, for example, for them to create the PO to their Financial Management System. This will update the job task status to "Complete - PO Created" and update the job with the sub status "PO Created on Tasks".

Item 4: Auto-Archiving of Jobs using rules you set up

Why is it useful? You can archive off jobs which have been completed for a long time and you no longer want showing on the live operational system.

We now have a new archive centre in Settings where the user can set rules for when jobs are to be archived.

Archive Rules

Allows you to set up archive rules for the jobs.

From here the User can Create Archive Rules with 5 different Rule Types as seen the in screen shot below. You also have to specify the number of days to elapse before the job is archived.

Create Archive Rule

Rule Name

Rule Type Job With Rejected Sales Quote

- Job With Rejected Sales Quote
- Job With Open Sales Quote
- Open Job
- Completed Job
- Cancelled Job

Rule Name - The Name of the Rule

Rule Type - The Type of the Rule

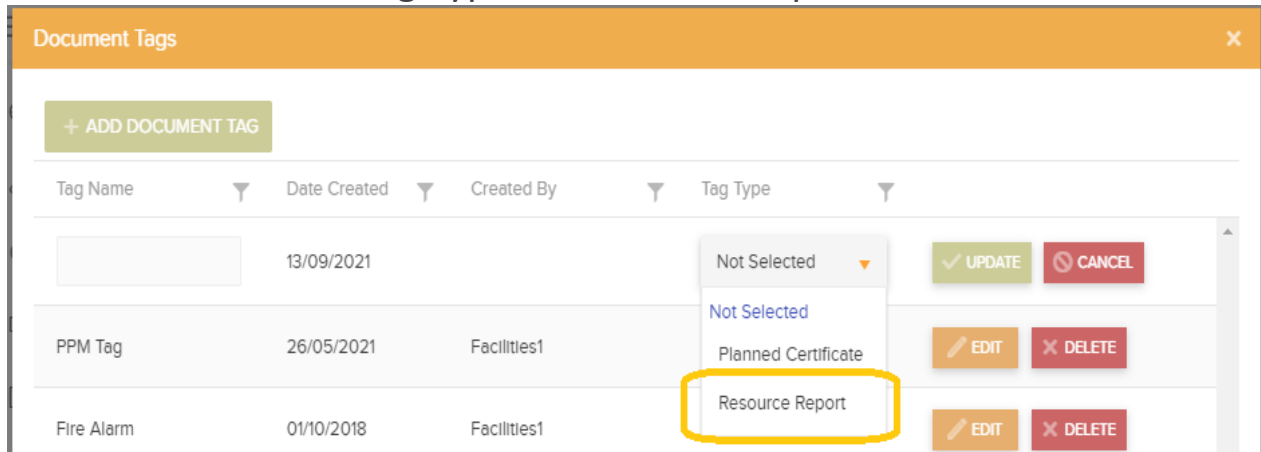
Days - The number of days after which the jobs should be archived for the rule

Item 5: Resource Report Document Tag – force contractors to upload a job report to a task before they can complete it

Why is it useful? A very useful feature as it will force Contractors to upload a Job Report Document before they are able to complete the task.

Two aspects to this new feature.

1. You can now set up a new Document Tag in the Documents Manager Module and set the Tag Type to 'Resource Report'



The screenshot shows the 'Document Tags' interface. At the top is an orange header bar with the title 'Document Tags' and a close button. Below the header is a green button labeled '+ ADD DOCUMENT TAG'. Underneath is a table with the following columns: 'Tag Name', 'Date Created', 'Created By', and 'Tag Type'. The table contains three rows: a new tag being created (empty name, date 13/09/2021, created by Facilities1, tag type Not Selected), a 'PPM Tag' (date 26/05/2021, created by Facilities1, tag type Planned Certificate), and a 'Fire Alarm' tag (date 01/10/2018, created by Facilities1, tag type Resource Report). The 'Resource Report' option in the dropdown menu is highlighted with a yellow box. To the right of the table are buttons for 'UPDATE', 'CANCEL', 'EDIT', and 'DELETE'.

Tag Name	Date Created	Created By	Tag Type
	13/09/2021	Facilities1	Not Selected
PPM Tag	26/05/2021	Facilities1	Planned Certificate
Fire Alarm	01/10/2018	Facilities1	Resource Report

2. On the Resource Details page, we have 2 new settings. *Enable Cost Finalised* (Controls whether to allow contractors to finalise costs on a job after being completed) & *Resource Report Required* (Controls whether a resource report is required before completing a job or finalising costs).

If *Resource Report Required* is set, then in the Contractor Portal, the Contractor will have to upload a document and tag it as a Resource Report, before they can sign the task off as complete.

Item 6: Emails to contractors: New Public Notes tag for Instruction to contractor Email.
Why is it useful? This new additional Tag will allow you to include public Job Notes on the email to Contractors.
Just a quick update here. A new tag has been added to the email templates “To contractor on instruction 1 & 2”. This tag will grab all the public Job Notes associated to the job and send them via the Instructed Email to the contractor

Item 7: For Transport Jobs Only- Pickup and Destination address in resource app, email and SMS template.

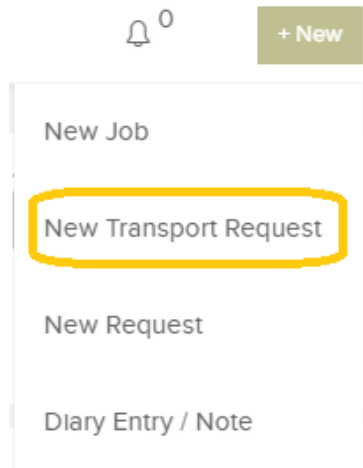
Why is it useful? These new additional Tags will let you include extra information regarding the Transport Job to Resources/Crews or Delivery Companies.

Just a couple of new Tags added here to SMS template and email template for Instruction emails.

1. [Transport:PickupAddress]
2. [Transport:DestinationAddress]

The Transport Module in Trackplan is only relevant to clients who Transport people or items from A to B.

1. It starts by clicking on New Transport Request.



2. From here you can create a new Transport request.

New Transport Request:

Job Type	Transport
Reported By Name	Darren
Reported By Email	darren@darrenm.ie

Main Contact Details:

Contact Name	Darren
Address 1	Main Street
Address 2	
Town	Ennis
Postcode	
Region	Generic Region
Telephone	086
Email	

3. You can then choose your Pick-up point and Destination as well as other information like, time and vehicle type.

Journey 1 - Task Number 14-001

Back Save

Pick Up	Lookup Existing Address	Destination	Use Main Contact	Lookup Existing Address
Address 1	Main Street	Address 1		
Address 2		Address 2		
Town	Ennis	Town		
Postcode		Postcode		
Pickup Time	13/09/2021 11:48	Arrive Time	13/09/2021 12:48	
Pickup Window (hours)	1.00			
Vehicle Type	(please select)	Other Information		

The above section will then appear on the Job Details page where you can choose the Crew/Transport Company and assign them the Job.

For any Client looking more information on this feature contact us at support@trackplanfm.com

Coming Soon

Item 1: Requestor App.
<p>Why is it useful? Job Requests can be created easily from the app from users and guests (e.g., tenants and residents). And scanning from QR codes to follow...</p>
<p>A quick sneak peek of our Requestor App coming soon.</p> <p>1. Welcome Page</p> <div><div></div><div>Requestor App</div></div> <div><div>Trackplan^{FM}</div><div>Welcome to the requestor app</div><div><div><div></div><div>RAISE NEW REQUEST</div></div><div><div></div><div>VIEW REQUESTS</div></div></div></div> <p>2. Request List</p>

Requests

2817

Pending

Details: 12:33

Site: Building No 1 test

Location: 11:16

Raised by: test

Created: Aug 24 2021 11:33AM

2787

Declined

Details: 13:55 Request

Site: Calmount Business Park G5 - G4S Secure

Location: Floor 1

Raised by: Daniel

Created: Aug 12 2021 12:55PM

4152

Approved

Details: Testing manager app

Site: 11111111

Location:

Raised by: me

Created: Aug 23 2021 12:06PM

3. Raise New Request Page

New request

Raise new request

Details *

Light bulb to change.

Site

Building No 1 test

Location

Floor 5

Sub-location

Room 1

RAISE REQUEST

Item 2: Job booking

Why is it useful? – Job contacts (such as residents) can choose when they want the engineer or contractor to visit. Once they select a date and time, the engineer and contractor will be instructed