Trackplan FM

Release 31st October 2021

Key Features & Improvements:

- Item 1. Job booking – job contacts (such as residents) can choose when they want the engineer or contractor to visit.
- Item 2. Dashboard – Improvements to the filters, ability to assign one or multiple Dashboards to Users and ability to rotate the dashboards, full screen mode.
- Item 3. Form Workflow - On Form Submit assign job to user or team.
- Item 4. New fields and improvements to Asset Details for asset lifecycle.
- Item 5. Request App for staff, tenants, and residents to raise requests from a mobile app.
- Item 6. New Knowledge Base.
- Item 7. Revenue Jobs.
- Item 8. Contracts area improvements.
- Item 9. Key job event notifications to job / site contact.
- Item 10. Auto approval of requests for certain job types and teams.
- Item 11. Asset upload. Can now associate each asset to up to 6 planned maintenance schedules.

Coming Soon:
- Multi language versions of Trackplan.

Manager App on v10.5.0
Resource App on v10.6.0

Work done for this Release

Item 1: Job booking – job contacts (such as residents) can choose when they want the engineer or contractor to visit.
Why is it useful? Booking Schedules are perfect for any organisation who want to invite the job or site contact to select their preferred time for a job visit. For example, property management companies and housing associations with 100s of site residents. The booking schedules can be set up and attached to Reactive Jobs or Planned Schedules. The booking schedule attached to a job, then lets you send out a booking request email to end users (for example residents or job / site contacts). A link on this email will bring the job contact to a webpage where they can then pick a suitable time slot for the job visit.
Knowledgebase link: https://cafm.fm/article/booking-schedules-and-job-booking/

Item 2: Dashboard – Improvements to the filters, ability to assign one or multiple Dashboards to Users and ability to rotate the dashboards and view in Full Screen mode.

Why is it useful?

The full screen view mode will be great for large screens visible by the whole office. And selected dashboards can be rotated every 30 seconds.

New dashboard filters give more power over what you want to show. Now covering Site, Region, Job Type, Team and time period.

You can also assign a subset of dashboards to each user.

You can choose which aspects of a dashboard to show by selecting or deselecting the legends.

Knowledgebase link:

https://cafm.fm/article/dashboard-views/

https://cafm.fm/article/user-details/

Item 3: Form Workflow - On Form Submit assign job to user or team

Why is it useful?

When a form attached to a job is submitted, the job can then be reassigned to a specific user and/or team. Helpful for organisations with multiple departments who will be involved in the job at different stages.

Knowledgebase link:

https://cafm.fm/article/form-designer/

Item 4: New fields and improvements to Asset Details
Why is it useful?
More useful fields added so clients can manage replacement cost, asset age and life expectancy.
Knowledgebase link: **https://cafm.fm/article/asset-details/**

Item 5: Requestor App for staff, tenants, residents to raise requests from a mobile app.
Why is it useful?
The Requestor App which is our 3rd app will be very useful to clients who can give access to tenants, residents or staff via a link sent by email. A request can be created simply and quickly against a site, location or asset. And then a photo taken. Quick access can be provided from a weblink without the person needing a login. But login access can also be provided so the user can see previous requests and their status.
Knowledgebase link: **https://cafm.fm/article/trackplan-requestor-app-introduction/**

Item 6: New knowledge base
Why is it useful?
An up-to-date resource for how to do things in Trackplan. We will try our best to keep it up to date!
Knowledgebase link: **https://cafm.fm**

Item 7: Revenue Jobs
Why is it useful? We have added a new flag to each job called "Revenue Job". By default, each new job will be classified as a revenue job. But if it is "request for quote", it will not be classified into a revenue job until the quote has been approved. This is most relevant to facilities companies who want to filter out jobs where there will be costs and revenue involved. The revenue job filter is on reports and the job and task list. And you can choose whether to include or exclude revenue jobs from the dashboards.
Knowledgebase link: **https://cafm.fm/article/revenue-jobs/**

Item 8: Contracts area improvements
The existing contracts area if being used by many of our clients for different purposes. For example: 1. You can set up a contract as a new capital expenditure project and a budget can be assigned to it. Jobs can then be assigned to this contract, and job costs against this contract's budget can then be monitored. 2. Sites can be assigned to a contract. This provides another way to group sites and is useful for organisations with many sites such as facilities companies.   We have improved the contract area, so it is now broken out into multiple tabs. And you can now upload documents against a contract. And for each contract you can explicitly declare whether it is for grouping sites (case 2) or not (case 1).
Knowledgebase link: **https://cafm.fm/article/contracts-and-budgets/**

Item 9: Key job event notifications to job / site contact

Trackplan already sends out many email notifications to users upon different events.

We have made it easier to flag the main contact on a job to receive job event email notifications (for example, when the expected date is changed or the job is instructed)

The job contact is usually the main site contact to whom the job relates.

Knowledgebase link:

https://cafm.fm/article/job-details/

Item 10: Auto approval of requests for certain job types and teams

When a job request is created, then the request (and subsequent job upon approval) can be assigned to a team dependent on the job type chosen during the creation of the request.

You can now choose to have this request automatically approved when it is assigned to a particular team. This saves time for certain users such as security staff who just want to process the actual job. They will not need to first approve the job request.

Knowledgebase link:

https://cafm.fm/article/auto-approval-of-requests-for-certain-job-types-and-teams/

Item 11: Asset upload. Can now associate each asset to up to 6 planned maintenance schedules.

Clients can upload their assets from an excel sheet. Before this release, you could associate each asset to up to 3 planned maintenance schedules with a corresponding due date and resource.

You can now associate each asset to up to 6 planned maintenance schedules.

Useful for organisations with important assets with many planned maintenance plans.

Knowledgebase link:

https://cafm.fm/article/upload-centre/

Coming Soon

We are now working hard on the translation of Trackplan into foreign languages such as French and Spanish. We will be busy on this until at least February 2022.