

# Trackplan

Release 8th April 2022

## Key Features & Improvements:

- Improve User Settings for job and request access.
- In the apps, users can choose and complete a form for a site, location, sub location or asset
- Manager App - Can now decline requests as well as approve them
- Can associate multiple priorities for each job type.
- Form Library improvements - Can choose site, location, sub location & asset when starting a new form. Email notifications enabled.
- Sites - 6 new miscellaneous fields added.
- Can now duplicate an existing asset.
- Purchase Orders, several improvements.

## Coming Soon:

- Upload Centre – Download template can include all existing data
- Contractor Schedule of Rates, and recording hours worked on job.
- Contractor can scan the site's QR code to start and leave task.
- Contractor can issue a job task to a subcontractor
- Planned Maintenance – Can now generate planned jobs when they are due and not wait for the last job to be completed.
- Job Sub Type filter added to dashboard filters

*Manager App on v11.1*

*Resource App on v11.1*

*Request App on v2.1*

## Work done for this Release

### Item 1: Improve User Settings for job and request access.

#### Why is it useful?

A change to 2 settings here for Users & User Types in general settings tab to give the client more flexibility and clarity to restrict users on the Jobs and Requests they can access.

#### Knowledgebase link:

<https://cafmm.com/article/user-details/>

### Item 2: In the apps, users can choose and complete a form for a site, location, sub location or asset

#### Why is it useful?

Users of the Manager or Resource App now have the ability to choose from a list of forms on a specific Site, Location, Sub Location or Asset. Great for Users or Resources who are out and about and want to quickly complete an Inspection Form, Meter Reading, Risk Assessment or any other form pre designed on the system.

#### Knowledgebase link:

<https://cafmm.com/article/trackplan-manager-app-introduction/>

<https://cafmm.com/article/trackplan-resource-app-introduction/>

### Item 3: Manager App - Can now decline requests as well as approve them

#### Why is it useful?

Another useful feature in the Manager App. The User can now Decline requests as well as approve them.

**Knowledgebase link:**

<https://cafm.fm/article/trackplan-manager-app-introduction/>

**Item 4: Can associate multiple priorities for each job type.**

**Why is it useful?**

A useful feature to associate one or multiple priorities to each job type. When creating a new Request or Job, when you select the Job type, a default priority will be set and the dropdown will be populated with the other associated priorities for that job type.

**Knowledgebase link:**

<https://cafm.fm/article/reactive-job-types/>

**Item 5: Form Library improvements. Can choose site, location, sub location or asset. Email notifications enabled.**

**Why is it useful?**

When starting a new Form from the Form library in the main application you can now choose what site, asset or location that you want to associate the form to. Form Email Notifications have also been enabled for Form Library Forms.

**Knowledgebase link:**

<https://cafm.fm/article/form-library/>

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

**Item 6: Sites – 6 new miscellaneous fields**

**Why is it useful?**

Very useful to capture extra information on each site. These 6 new site fields: 3 free text and 3 drop downs (which are configurable). The labels of each of the 6 fields can be configured in Settings -> Custom Labels.

All these dropdowns can be managed in Settings -> Additional Dropdowns.

**Knowledgebase link:**

<https://cafmm.com/article/additional-dropdowns/>

**Item 7: Can now duplicate an existing asset**

**Why is it useful?**

A quick and easy way to add a new asset is to Duplicate an existing one. The Duplicate button will bring up the new asset screen with all fields prepopulated except for the asset number as this needs to be unique.

**Knowledgebase link:**

<https://cafmm.com/article/asset-details/>

**Item 8: Purchase Order Improvements**

**Why is it useful?**

Some very useful features here for clients who use the Purchase Order module.

- the ability to select a site when creating an ad hoc Purchase Order,
- a new link on the confirmation email template that takes the users directly to that PO,
- ability to email the PO to the supplier once fully confirmed.
- For Purchases Orders attached to a Job we have added some workflow here including new buttons, 'Instruct Job and Send PO' and 'Flag as Invoiced'.
- We have improved the PDF settings area by adding new tags and the ability to include the header, tax and totals on the PDF.

**Knowledgebase link:** <https://cafmm.com/article/purchase-orders-material-requests/>

