

Trackplan^{FM}

Release 9th August 2022

SUMMARY

Key Features & Improvements:

- Apps - Repeatable sections in Forms available.
- Apps – Asset Question in forms now available in Apps.
- Apps – Can take and view photos and documents against sites and assets.
- Apps – Form Library: When starting form can now select the site, location, sub location or asset.
- Improvements to Form PDF print options.
- Export to Excel from data grids (jobs, form results, assets etc.) greatly improved.
- Schedule of Rates (Contractor and Client) and visits. Recording hours worked on job visits and costing using schedule rates.
- Contract Notification Settings (e.g. when over budget) now available on a contract by contract basis.
- Advanced Job Routing improved. Can now route to a resource based on type of job, days/times and site.
- App Manager improved.
- Sales value for Planned Jobs.
- Bug fixes.

Manager App on v11.3

Resource App on v11.3

Request App on v2.1

Coming Soon in Future Releases:

- Can restrict available forms for each asset, site or location
- Contractor Portal - Schedule of Rates, and recording hours worked on job.
- Contractor can scan the site's QR code to start and leave task.
- Contractor can request new Start Date and Time.
- Can set priorities / SLAs for job tasks
- Planned maintenance can be driven by running / operational hours of asset (feeds in from readings from forms)
- Can view graph / chart of readings from form entries. For example, for meter readings.
- Parent and child asset – big improvements
- Documents – can set expiry date for documents. Great for health and safety etc.
- Apps - Document tags for documents in the apps.
- Push notifications when job assigned to user on Manager App.
- Audit trail of emails sent plus status of email (e.g. sent, received, blocked)
- Room and Asset booking
- Spaces – can set unlimited hierarchy level in sites, locations and sub locations

Work done for this Release

Item 1: Repeatable sections in Forms available on the Apps.

Why is it useful?

Electronic forms can be designed with multiple sections and some, or all of these sections can be repeatable. A very useful feature, now available on the Manager & Resource App. The engineer can then repeat a section on the form for each individual Location, Sub Location or Asset.

Knowledgebase link:

<https://cafmm.com/article/form-designer/>

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

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

Item 2: Asset Question in forms now available in Apps.

Why is it useful?

Available in the main application for a while now, this feature is now live in the Manager App & Resource App. An important feature for users or contractors on site. They can select or create an asset from within the form or scan a QR code attached to that asset.

Knowledgebase link:

<https://cafm.fm/article/asset-question-type-on-electronic-forms/>

Item 3: Can take and view photos and documents against sites and assets.

Why is it useful?

A very useful feature for users of the Manager App or Resource App. They can navigate to a specific site, location, sub location or asset and take photos or upload documents. All this data will be sent back and stored in the main application.

Knowledgebase link:

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

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

Item 4: – Form Library: When starting form can now select the site, location, sub location or asset.

Why is it useful?

This feature went live on the main application a number of months ago and is now available on the Manager & Resource App. A very useful feature for users or contractors out and about who need to submit a form. They can choose their location or asset and when submitted will be stored against that location or asset back in the main application.

Knowledgebase link:

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

<https://caf.m/article/trackplan-resource-app-introduction/>

Item 5: Improvements to Form PDF print options.

Why is it useful?

A number of new useful features here to give the client more flexibility on how the form displays when printed to PDF. Use a default footer or design their own and a new configuration setting relating to page breaks.

Knowledgebase link:

<https://caf.m/article/form-designer/>

Item 6: Export to Excel from data grids (jobs, form results, assets etc.) greatly improved.

Why is it useful?

A wonderful improvement by our development team here to help clients with thousands of rows in certain grids to download. The speed and volume of data when exporting to excel has improved immensely.

Knowledgebase link:

Item 7: Schedule of Rates (Contractor and Client) and visits.

Why is it useful?

A wonderful new feature for users who would like to keep track of all their sales rates across all of their clients or contractors. You can set up as many sales rates as you want. So when a job is created for a specific contract, its associated schedule of rates will be selected. And the type of job, priority, site etc will then determine the specific sales rate it will select for the job from the associated schedule of rates. This sales rate is then applied to the number of hours worked on the job from the job visit. This then creates a sales value for the job visit which can then be costed as a new cost with its sales value.

Knowledgebase link:

<https://cafmm.com/article/schedule-of-rates/>

Item 8: Contract Notification Settings (e.g. when over budget) now available on a contract by contract basis.

Why is it useful?

These settings were always available in the settings area which would configure all contracts but now we have added them to each individual contract.

Knowledgebase link:

<https://cafmm.com/article/contracts-and-budget-settings/>

Item 9: Advanced Job Routing improved. Can now route to a resource based on type of job, days/times and site.

Why is it useful?

Great improvements here. The user can now set up routes based on certain days and time and more importantly, choose a Resource and auto instruct the job to them.

Knowledgebase link:

<https://cafmm.com/article/advanced-job-routing/>

Item 10: App Manager improved.

Why is it useful?

Some improvements here to include our recent Request App. In Settings -> App Manager you can easily keep track of all Users & Resources who have access to the apps or create new App users.

Knowledgebase link:

<https://caf.m.fm/article/app-manager/>

Item 11: Sales value for Planned Jobs.

Why is it useful?

A useful feature where you can now add a sales value when creating a planned schedule. 3 new fields – Sales Labour, Sales Materials & Sales Call-out. When a planned job is created and instructed then the sale values set here will be added to the new job cost row.

Knowledgebase link: