Trackplan FM

Release 22nd September 2022

SUMMARY

Key Features & Improvements:
- Can specify which forms can be selected for a site, location or asset.
- Can set a document expiry date for each document with email notifications.
- Parent and Child Assets – can define an asset hierarchy.
- Manager and Resource App – can search on job number.
- Finance – when jobs costs flagged as Invoice Received, set the job cost budget to 0.
- Select Resource on Job page. Trade filter now multi-select, and the trade and region filters prepopulate from the site and job type of the job.
- Request app: the request list, site list and asset list improved.
- Guest Request app: Can now include a "captcha" when a user creates a new request for added security.
- Resource notes can now be included in the instruction email template.
- Job sub type and its code now included in cost list and cost report & Job Sub Type filter in job calendar.
- Can specify default instruct email template by site and site type.
- Contractor Portal – can see site address on job task.
- Cost Screen improvements with description fields for labour, materials, Under Query comments, sales mark-up %.
- Advanced Job Routing for auto approved requests now follow the rules as well!
- Document Tags for apps.
- Resource App - Scan Asset button on asset question.
- Job Types merged.
- Can set priorities for Job Tasks and Visits

Coming Soon in Future Releases:

- Grouped Job Type feature
- Contract improvements – status, types etc
- Main asset photo to show on asset details page
- More reports, resource performance etc
- Contractor portal work – Accepting task, declining task, rescheduling task

Work done for this Release

Item 1: Can specify which forms can be selected for a site, location or asset

Why is it useful?

In the Main application, on the details page of the site, location, sub location or asset you can now restrict what forms are available.

This means that when a user adds a form to the Site, Location or asset, the end-user, either on the main application or the mobile apps will only be able to select the templates that you have selected.

Knowledgebase link:

https://cafm.fm/article/create-a-site/

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

Item 2: Can set a document expiry date for each document with email notifications

Why is it useful?

Easily keep track of insurance expiry date etc. When uploading a document to Trackplan you are now given the option to set the expiry date and set one or multiple email addresses to receive notification when that document is due to expire.

Knowledgebase link:

https://cafm.fm/article/documents-overview/

Item 3: Parent and Child Assets – can define an asset hierarchy

Why is it useful?

Link assets together easily from the asset details page. This new feature allows the user to set a Parent asset. They can then click on the tab 'Child Assets' to get a list of all assets associated to that parent.

Knowledgebase link:

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

Item 4: Finance – when jobs costs flagged as Invoice Received, set the job cost budget to 0

Why is it useful?

If you have a default job budget set and are entering costs to jobs you can save these costs as Invoice Received. Once clicked, the cost status will be set to 'Invoice Received' and it will automatically set the job budget to zero.

There is a new setting to enable this feature in Settings → Job Settings → Finance Settings.

Knowledgebase link:

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

Item 5: Select Resource on Job page. Trade filter now multi-select, and the trade and region filters prepopulate from the site and job type of the job.

Why is it useful?

A great addition to the software to speed up contractor selection and stop mistakes happening. If you have set up all of your Resources into specific trades and regions, when selecting a resource from the Job details page (Instruct wizard) the region & trade filters will be pre populated and select the correct contractor for that job.

Knowledgebase link:

https://cafm.fm/article/resource-trades/

https://cafm.fm/article/site-regions/

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

Item 6: Request app: the request list, site list and asset list improved

Why is it useful?

As our Request App is getting more and more popular, we have made some slight style improvements to make the experience an enjoyable one for the end user.

Knowledgebase link:

https://cafm.fm/article/trackplan-requestor-app-introduction/

Item 7: Guest Request app: Can now include a "captcha" when a user creates a new request for added security

Why is it useful?

Once again, as the Guest Request App is getting used more and more some clients requested a captcha option for the user to click as a way of thwarting spam and for additional security.

This can be customised and turned on in Settings -> Job Requests.

Knowledgebase link:

https://cafm.fm/article/job-request-settings/

Item 8: Resource notes can now be included in the instruction email template

Why is it useful?

Just an additional tag added here so the user now has the option to add the Resource notes to the instruction email template. Most clients are using the Email template 'To Contractor on Instruct 1' but remember these templates can be duplicated and set in the Resource details page, Site Details page or Settings -> Site Types.

Knowledgebase link:

https://cafm.fm/article/email-templates/

Item 9: Job sub type and its code now included in cost list and cost report

Why is it useful?

Another new filter added to the Cost list, Cost report and Job Calendar. Very useful to view jobs, costs & run reports on specific Job Types & Sub Types.

Knowledgebase link:

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

Item 10: Can specify default instruct email template by site and site type

Why is it useful?

As mentioned in point 8, you now can set a specific Instruct email template to a site or site type. Meaning that when a job is created and instructed on a specific site, the system will use the email template you have set for that site. Previously this was only set for contractor.

Knowledgebase link:

https://cafm.fm/article/site-types/

Item 11: Contractor Portal – can see site address on job task page
Why is it useful?
A small but very useful label has been added to the Task details page in the Contractors portal. The sites full address will now show, giving the contractor full details of where the issue/task is.
Knowledgebase link: **https://cafm.fm/article/contractor-portal-overview-2/**

Item 12: Cost Screen improvements with description fields for labour, materials, Under Query comments, sales mark-up %
Why is it useful?
Major improvements here to the cost screen in view and edit mode. Extra fields to capture additional information for materials, labour & call-out. Under Query will now show in bold red text and an additional comments box will appear. Edit sales values and percentage mark up easily and clearly.
Knowledgebase link: **https://cafm.fm/article/job-costs/**

Item 13: Advanced Job Routing. Auto Approval of requests now follow the rules as well.
Why is it useful?
A very important feature here. Any request that has been auto approved will now follow the Job routing process. Meaning, a request raised in the main application or on the request app under a certain job type, or if that users settings allows for auto approval will now be assigned to a specific user, team, choose the resource/contractor and auto instruct. A very powerful feature. We have 2 ways on the system that Job Requests can be auto approved.   1. In Settings -> Users -> General Settings -> Job Request Workflow Settings -> Requests created by this user Auto-Approve into jobs

2. In Settings -> Teams ->Auto Approve Job Request. This works alongside the Job Types. Select that Team on the Job Type and all requests for that type will be auto approved and assigned to that team

Knowledgebase link:

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

https://cafm.fm/article/teams/

Item 14: Document Tags for apps

Why is it useful?

A useful feature for users or resources using our Apps. When uploading documents, you now have the opportunity to add a tag to the document. Tags are a great way to file all your documents that have been uploaded to the Trackplan system.

Knowledgebase link:

https://cafm.fm/article/documents-overview/

Item 15: Resource App - Scan Asset button on asset question

Why is it useful?

If you have a form designed with an Asset question on it, you will now be able to scan the QR code on that asset and it will appear on the form. You can then continue completing the addition question. You may want to design the form, so the asset questions are in a Repeatable section. Therefore, you can then have multiple assets on the one form.

Knowledgebase link:

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

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

Item 16: Job Types merged.

Why is it useful?

We have merged Reactive and Planned Job types. This will just make your job types easier to manage by having them all in the one grid. You can differentiate between reactive or planned or have the same job type for both.

Knowledgebase link:

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

Item 17: Can set priorities for Job Tasks and Visits

Why is it useful?

This new feature allows the user to set different priorities on job tasks by editing the Task details page or setting one when creating a new task. As we know you can have multiple tasks on a job, so each task now has its own priority. If you do not change the task priority it will always inherit the priority set on the Job.

Knowledgebase link:

https://cafm.fm/article/jobs-and-job-tasks/