



Release 29th August 2023

## SUMMARY

### Key Features & Improvements:

- **Projects:** Project status, Finance Codes, Project Numbering and Project Authorisations
- **Alerts:** Improvements to Job Alerts list & main Job list.
- **Alerts:** Overdue Notifications can be set for alerts.
- **Planned Schedule Alerts:** Can specify an alert to be created on job creation or when job is overdue.
- **Escalation Alerts:** Allow a job alert to be created on an escalation rule.
- **Select Resource window:** "# Open Jobs", "#Overdue Jobs" now available.
- **Add job notes to the report 'Job Report - All Columns'.**
- **Schedule of Rates –** can select Multi Select for Priorities for each rate rule.
- **Resource filter dropdowns** restricted to client contract selected.
- **Bug fixes and performance improvements** in all applications.

*Main Application v23.5.0*

*Manager App v12.0.7*

*Resource App v12.2.4*

*Request App v2.3.3*

## Coming Soon in Future Releases:

- API - work started (due end of September).
- Merge the Manager App, Resource App and Request App into one app - work started (due end of October)
- Message Basket – can collect and process incoming emails from contractors and 3rd party systems such as BMS, Health and safety systems and IoT systems - work started (due October)
- Requestor can go straight to job request page from weblink in email sent on request creation.
- Resource details - can specify cc email address. On instruct can select from resource contacts. Can select resource based on site allocation in Advanced Job Routing.
- Show recent asset status changes in asset list and job list and similar reports.
- Can edit job alerts (due October)
- New escalation type “Job Completed”.
- Email can be sent out on job completion requesting a satisfaction survey.
- Projects – more enhancements: Gantt style chart for reporting- work started.
- Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings.
- Room and Asset Booking.
- QR Codes for electronic forms.

## Work done for this Release.

### Projects - Project status, Project Numbering, Project Costs, Project Numbering and Project authorisations.

#### Why is it useful?

Updates to our new Projects module, which include the project status (driven by the approval process you can set up in Settings → Project Settings), Finance Codes, that can be created in the Finance area & Contract Numbering (also in Project Settings).

We have also added the ‘Other Costs’ tab on the project details page. Here you can add ad hoc costs that will be deducted from the overall project budget. You can also require projects to be approved and define authorisation bands before a project is put live.



+ New

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Resource

(Please Select) ▾

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+ Create



Cost Information

Name	Project Number	Refere...	Status	Start Da...	End Date	Project Value	Job Costs	Purchase Orders	Other Costs
Cleaning			Approved	01/09/2022	01/12/2022	400,000....	1,500.00	0.00	336.0
Electrical			Pending			50,000.00	0.00	0.00	0.0
Division A	MARd1	d123	Pending			50,000.00	1,000.00	200.00	170.0
North Contract			Pending			0.00	0.00	0.00	0.0
Alex Contract			Approved			16,000.00	0.00	0.00	0.0
Refurbishment		rp1	Pending	09/05/2023	14/09/2023	100,000....	0.00	0.00	0.0

### Project Settings



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Edit

#### Project Settings

- Send Email When Project is Close to Expiry  Yes  No
- Send Email When Project Is Expired  Yes  No
- Send Email When Costs on Project Over Percentage  Yes  No
- Send Email When Project Value has Exceeded  Yes  No
- Block Instruction if Project Expired  Yes  No
- Block Instruction When Project Value has been Exceeded  Yes  No

Help

#### Project Numbering Settings

- Prefix
- Enable Project Auto Numbering  Yes  No
- Next Project Number
- Can Project Number be Edited  Yes  No

Help

#### Project Approval Band Settings

Name	From Value	To Value	Can Confirm Lower Bands	Lower Band Confirmation Required First	Confirmation Users
PBand 1	0	10000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2
PBand2	10001	20000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2

## Knowledge base link:

<https://cafmm.com/article/projects/>

## Alerts: Updates to main Job Alerts list & main Job list.

### Why is it useful?

As alerts are getting improved and used more and more, we have updated the alerts list by adding the Job Type & Sub Type filters and a new 'Overdue' filter which shows open alerts where there is an overdue date on the alert, and it is beyond current datetime.

We have also updated the existing Job Alerts filter on the job list - new option - <No Open Alerts> under the option <Any Open Alert>. This will show all jobs with no open alerts.

### Details:

The screenshot shows the 'Job Alerts' interface. At the top, there are several filter dropdowns: 'Alert Status' (set to 'Open Alerts'), 'Assigned User' (set to '<Alert Assigned To>'), 'Client Contract' (set to '<Client Contracts>'), 'Site' (set to '<Sites>'), 'Job Type' (set to '<Job Type>'), 'Sub Type' (set to '<Job Sub Types>'), and 'Overdue' (set to '<Select>'). A dropdown menu is open for the 'Overdue' filter, showing options: '<Select>', '<Select>', 'Overdue', and 'Not Overdue'. A red arrow points to this dropdown. Below the filters is a table of alerts. The table has columns: '#', 'Job Details', 'Client Con...', 'Site', 'Status', 'Alert Details Assigned To', 'User', 'Team', 'Resource', 'Date', 'Type', 'Action Required', and 'Due Date'. Three rows of alerts are visible, each with an 'Action' button on the left. Red arrows point to the 'Job Type' and 'Sub Type' filters above the table.

#	Job Details	Client Con...	Site	Status	Alert Details Assigned To	User	Team	Resource	Date	Type	Action Required	Due Date
1237	My request details	Client 3	21st Septembe Test	Pending	All Users				24/08/2023 12:05	Review	Hello NEw alert to test overdue	24/08/20 09:00
1238	My request details	Client 3	21st Septembe Test	Pending	All Users				24/08/2023 12:01	Review	qweqweqwe	25/08/20 13:01
1115	throttle 1		Office No 1 OWO1	Pending	All Users				24/08/2023 11:30	Review	dsfdsf	24/08/20 11:35

## Alerts - Overdue Notification for all alerts.

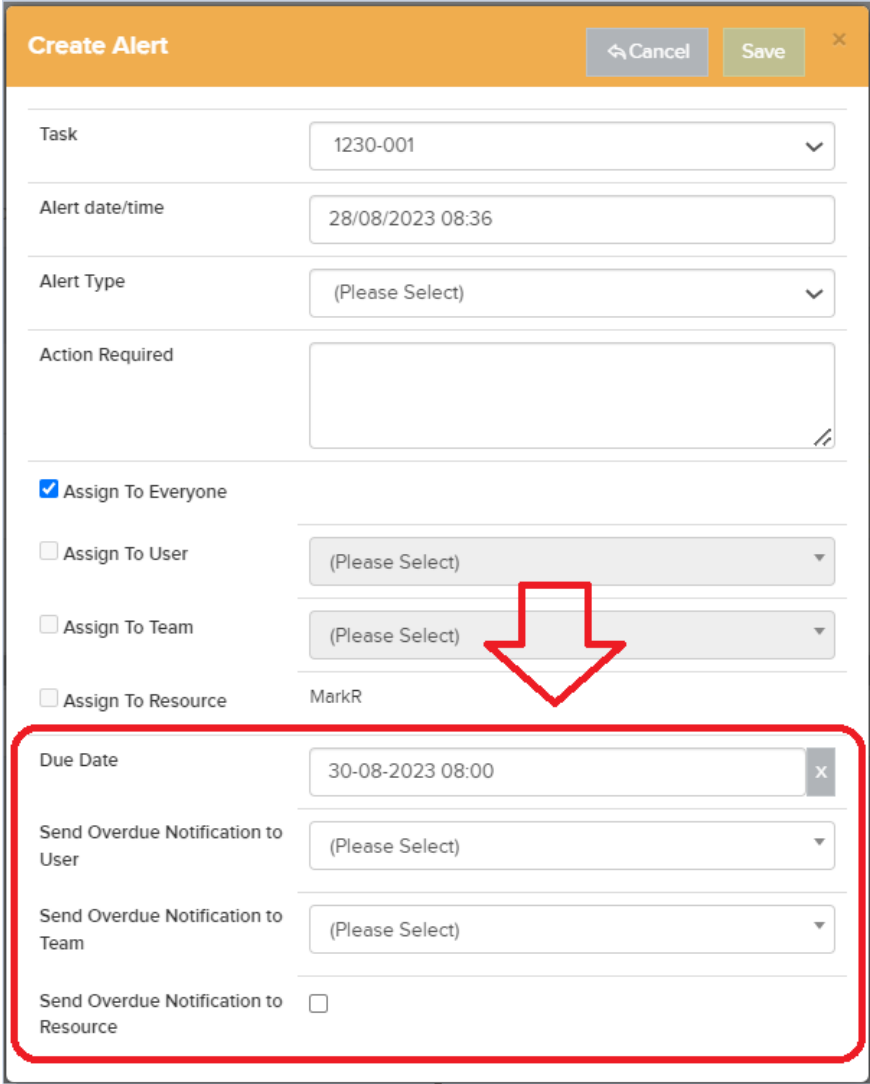
### Why is it useful?

When creating an alert, you will now have the ability to set a due date, and an email notification that can be sent to a user and/or team and/or resource when a job alert is still open (not actioned), and it is overdue.

We have also added the Due Date column to the main Job alerts list, which shows in red if the Due date is overdue and the alert is still open.

### Knowledge base link:

<https://cafmm.com/article/job-alerts/>



The screenshot shows the 'Create Alert' form with the following fields and options:

- Task:** 1230-001
- Alert date/time:** 28/08/2023 08:36
- Alert Type:** (Please Select)
- Action Required:** (Empty text area)
- Assign To Everyone:**
- Assign To User:**  (Please Select)
- Assign To Team:**  (Please Select)
- Assign To Resource:**  MarkR
- Due Date:** 30-08-2023 08:00
- Send Overdue Notification to User:** (Please Select)
- Send Overdue Notification to Team:** (Please Select)
- Send Overdue Notification to Resource:**

A red box highlights the 'Due Date' field and the 'Send Overdue Notification' options. A red arrow points from the 'Assign To Team' dropdown to the 'Due Date' field.

## Planned Schedule Alerts: Can specify an alert to be created on job creation or when job is overdue.

### Why is it useful?

When creating or editing a planned schedule you can now create alerts on either Job creation or when job is overdue. Like all alerts you can set an alert type, due date, and notification to be sent. A useful feature so you will always keep track of planned works.

The below panel is visible on the create and edit planned schedule screens.

### Details:

Job Alerts

Create Job Alert	When Job Overdue
Alert date/time	1 (hours after alert creation)
Alert Type	Review
Action Required	
Assign To Everyone	<input type="checkbox"/>
Assign To User	Darren McGill
Assign To Team	(Please Select)
Assign To Resource	<input type="checkbox"/>
Due Date	25 (hours after alert date)
Send Overdue Notification to User	Darren McGill
Send Overdue Notification to Team	(Please Select)
Send Overdue Notification to Resource	<input checked="" type="checkbox"/>

## Escalation Alerts: Allow a job alert to be created on an escalation rule.

### Why is it useful?

In settings → Escalation Rules you can create rules with certain trigger events. Whenever the event happens, you can choose to send an email, assign the job to someone else, create a note but now you can also create an alert on the job.

### Knowledge base link:

<https://cafmm.com/article/escalation-rules/>

## Select Resource window - "# Open Jobs", "#Overdue Jobs".

### Why is it useful?

A very useful feature requested by a client where you can now see the number of open & overdue jobs each resource has before you choose them on a new job.

We have also added the column configurator and resizable columns.

### Details:

The screenshot shows the 'Select Resource' window with the following table:

Name	Trades	Regions	Town	Status	Ranking	Open Jobs	Overdue Jobs
1001@test.com		All Regions		Approved		5	5
1002@test.com		All Regions		Pending		4	4
259@october.com		All Regions		Pending		1	1
800@test.com		All Regions		Pending		1	1
801@test.com		All Regions		Pending		2	2
eb@ishcontractor@contractor.com	Electricians	All Regions		Pending		1	1
Billing Resource for Mark	Special team	All Regions		Pending		1	1
Burhen Resource		All Regions		Pending		8	8
mark2		All Regions		Pending		4	4
mark5@.com		All Regions		Pending		0	0

## Add job notes to the report 'Jobs Report - All Columns'.

### Why is it useful?

Another new feature driven by clients. In our Reports module, if you run the Jobs report – All Columns it will now download the last 3 custom notes. A good way to quickly see any last actions/notes created by users on each job.

### Knowledge base link:

To	Job Creation to Start (hours)	Travelling Time (hours)	Hours on Site (hours)	Start vs Expected Start (hours)	Complete vs Expected Complete (hours)	Job Notes (Custom)
	-0.05	0.00	0.00	-2.03	-4.03	Note 3, Note 2, Note 1
	0.03	0.00	0.00	-1.68	-3.68	kmkoIm
	0.03	0.00	0.00	-119.95	-121.95	offline 2, offline note test, Latest test



## Multi Select for Priorities on Schedule of Rates.

### Why is it useful?

A useful feature for clients using the new schedule of rates feature. The ability to select multiple priorities when creating a rate rule will quicken the process for users and many rates for their contractors and clients.

### Details:

When is rate rule Selected	
All Times In Day	<input checked="" type="checkbox"/>
All Days in Week	<input checked="" type="checkbox"/>
Client Contract	<All Contracts>
Site	<All Sites>
Region	
Trade	
Job Type	<All Job Types>
Job Sub Type	<All Sub Types>
Priority	<input checked="" type="checkbox"/> Urgent <input checked="" type="checkbox"/> Normal
Site Type	<All Site Types>
Location Type	<All Location Types>
Job Category	<All Job Categories>
Asset Class	<All Asset Classes>
Asset Sub Class	<All Asset Sub Classes>