



Release 16th October 2023

## SUMMARY

### Key Features & Improvements:

- Trackplan API.
- Show email body for emails sent to resource for instruction and quote approval.
- Resource details page - can specify cc email address.
- Resource List - Mobile phone column added.
- Contractor Quotes - Delete quote and change task number.
- Asset page improvements.
- Edit job alerts – you can now edit the job alerts
- Job List – Can now see the Completed By column (who completed the job)
- Projects - Can now see the date created
- Client Contracts – We have reinstated the budget and cost columns and the start and end date. Plus, you can see the date the contract is created.
- Teams dropdowns – if the user setting “Can only view resources and teams for their teams” is enabled, then the user will be restricted to see their teams only.

*Main Application v23.6.0*

*Manager App v12.0.10*

*Resource App v12.2.7*

*Request App v2.3.3*

## Coming Soon in Future Releases:

- 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. (Q4 2023)
- QR Codes for electronic forms. (Q4 2023)
- New escalation type “Job Complete”, and Satisfaction survey forms. (Q4 2023)
- Job Request authorisations (Q4 2023)
- Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings. (2024)
- Room and Asset Booking (2024)

## Work done for this Release.

### Trackplan API

#### Why is it useful?

An API (Application Programming Interface) is simply some software that sends information back and forth between a website or application.

It can be useful for clients who use different systems to raise requests or jobs or clients who want to integrate with their finance system, IOT systems, HR systems etc.

#### Details:

This is an ongoing project, and we will be developing endpoints as we need them. To start with, we have developed one endpoint for Requests. This can be used for getting Requests from Trackplan or creating a Request within Trackplan.

Each client will have different needs so we will be working closely to establish data transfer types and triggers.

For more information on this you can contact [support@trackplanfm.com](mailto:support@trackplanfm.com)

Show email body for email sent to resource for instruction and quote approval.

## Why is it useful?

A very useful feature to keep track of what exactly was emailed to the contractor to avoid confusion.

## Details:

1. On the task details we will now show the body of the email sent - we currently show, Email To, Email Subject and Email Sent date.

The screenshot displays a 'Task Details' page with a sidebar on the left and a main content area. The main content area is divided into two columns. The left column contains a list of task details, and the right column contains status and permit information. A red box highlights the 'Email' section at the bottom of the left column, which includes the email body text. A red arrow points to the email body text.

**Task Details**

Cancel Task Decline Start Task Leave Task

Task No. 1336-001

Job No. 1336

Quote No.

Description  
Test Job 123

Assigned To  
Abilesh Treckplanfm

Created 12/10/2023 12:26

Created By  
Derren McGill

Priority  
2 Week window Planned

Expected Start 04/10/2023 10:35

Expected Complete 04/10/2023 12:35

Expected Duration 2.00

Status  
Instructed

Requires Permit No

QR Code No Enable QR Code

Email To derren@treckplanfm.com

Email Subject New Job Task 1336-001 from Treckplan et site: 000 Märk

Email Sent 12/10/2023 12:26

Email Body  
New Job Task 1336-001  
From: Trackplan  
To: John McGill

- Site: 000 Märk
- Details: Test Job 123
- Location: 001 mark - 003 sub mark
- ETA: 04/10/2023 10:35
- Job Priority : 2 Week window Planned
- Site: 25 O'Connell Street, Limerick, V94X2F

Price per job is €200

[Link to Contractor Portal](#)

[Link to Task](#)

Task Notes

Note By

Resource John McGill instructed on task: 1336-001. Expected Date set to 04/10/2023 10:35 Derren Mc

10 Items Per Page

2. On the contractor quote details page, we will now show the email body sent to the contractor upon approval.

Contractor Quote	
Quote No.	1336-001
Job Task No.	1336-001
Job No.	1336
Status	Approved
Resource	John McGill
Contractor Quote Reference	5546
Sales Quote	
Description	Quote for work
Requested For	12/10/2023 12:41
Submitted Date	12/10/2023 12:42
Submitted By	Derren McGill
Approved by	Derren McGill
Note	
Date Approved	12/10/2023 12:43
Created By	Derren McGill
Confirmation Email Sent To	Sent to Multiple Confirmers
Confirmation Email Sent On	12/10/2023 12:42
Email To	dernenmcgill@five.com
Email Subject	Quote 1336-001 approved by: Trackplan at site: 000 MArk
Email Sent	12/10/2023 12:42
Email Body	
Quote 1336-001 Approved	
From: Trackplan	
To: John McGill	
<ul style="list-style-type: none"><li>• Quote Number: 1336-001 Has Been Approved</li><li>• Job Task: 1336-001</li><li>• Job Number: 1336</li><li>• Site: 000 MArk</li><li>• Location: 001 merk - 003 sub merk</li><li>• Approved By: Derren McGill on 12 October 2023</li><li>• Quote Value: 1000.00</li><li>• Quote Details: Quote for work</li><li>• Note:</li></ul>	



## Resource details page - can specify CC email address.

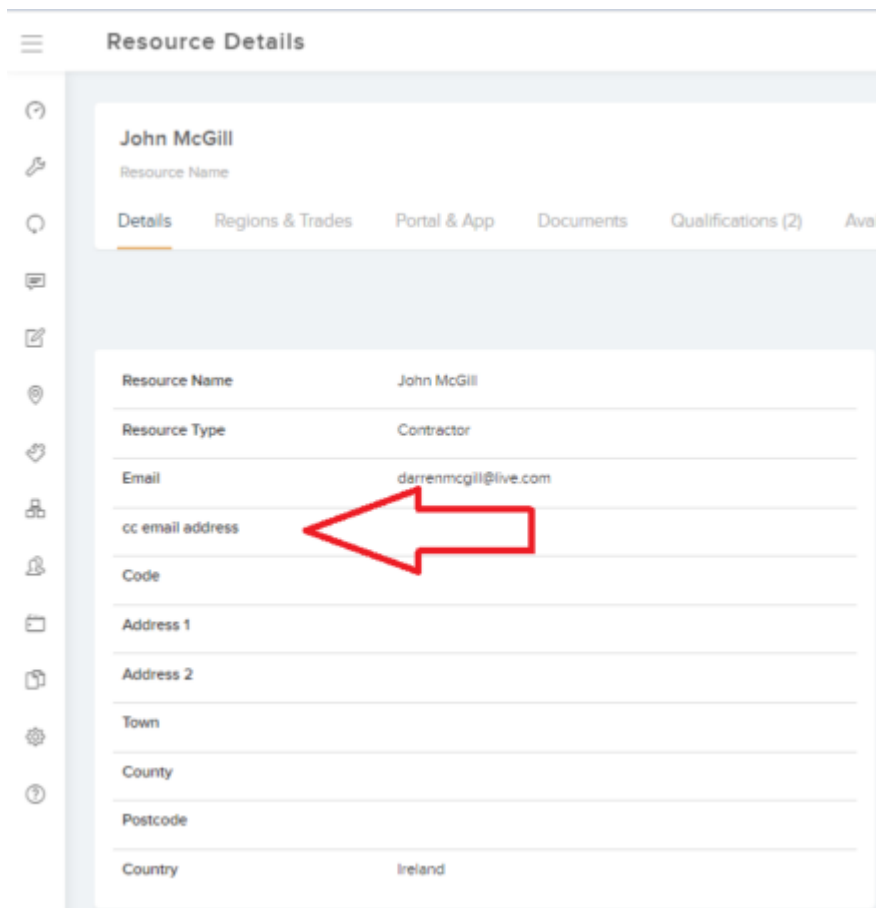
### Why is it useful?

This will be useful for a lot of clients who need to send the Job task to 2 different email addresses upon instruction.

You will also have the option to select the email address from the Users list or Resource contacts when you are instructing the task.

## Details:

Set a default cc email address on the Resource Details page.

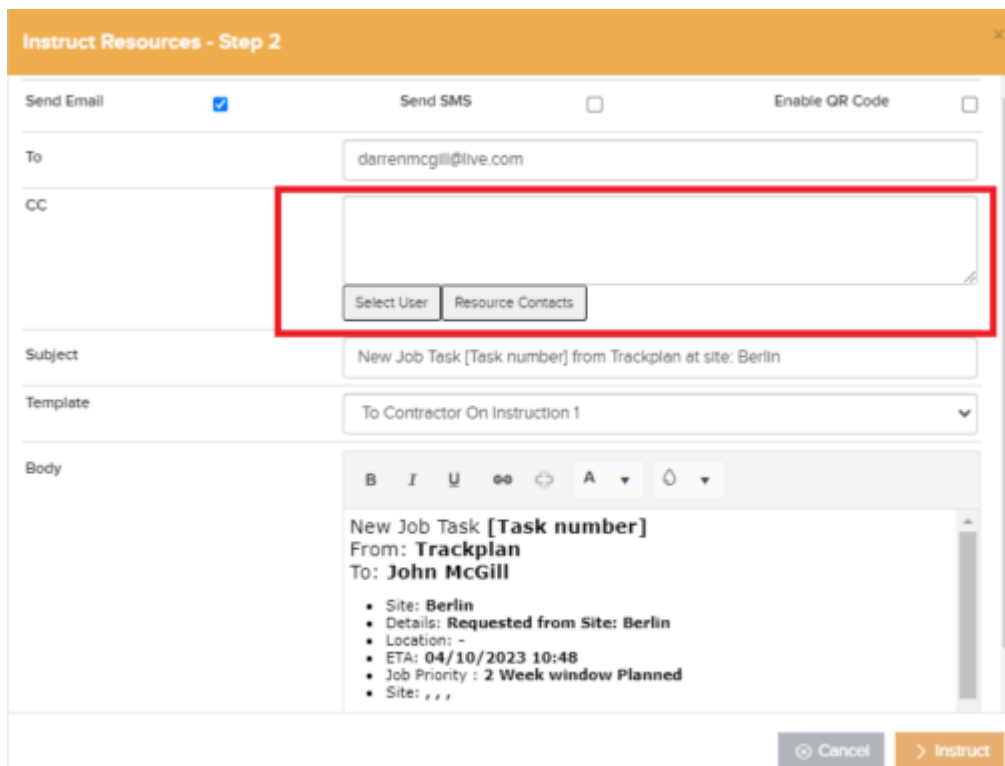


The screenshot shows the 'Resource Details' page for John McGill. The page has a navigation bar with tabs: Details, Regions & Trades, Portal & App, Documents, Qualifications (2), and Avail. The main content area displays a list of fields for the resource:

Resource Name	John McGill
Resource Type	Contractor
Email	darrenmcgill@live.com
cc email address	
Code	
Address 1	
Address 2	
Town	
County	
Postcode	
Country	Ireland

A red arrow points to the 'cc email address' field, which is currently empty.

Or select from your users list or Resource Contacts list at the point of Instruction.



The screenshot shows the 'Instruct Resources - Step 2' dialog box. The 'To' field is filled with 'darrenmcgill@live.com'. The 'CC' field is empty and highlighted with a red box. Below the 'CC' field are two buttons: 'Select User' and 'Resource Contacts'. The 'Subject' field is filled with 'New Job Task [Task number] from Trackplan at site: Berlin'. The 'Template' field is set to 'To Contractor On Instruction 1'. The 'Body' field contains the following text:

**New Job Task [Task number]**  
**From: Trackplan**  
**To: John McGill**

- Site: Berlin
- Details: Requested from Site: Berlin
- Location: -
- ETA: 04/10/2023 10:48
- Job Priority : 2 Week window Planned
- Site: , , ,

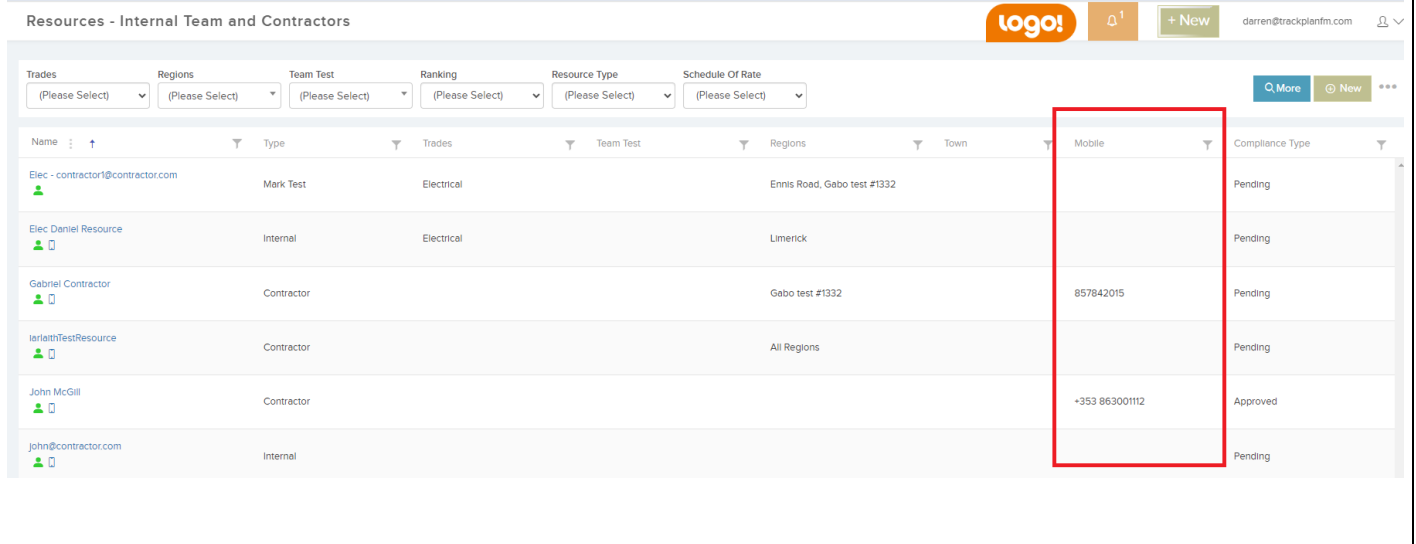
At the bottom of the dialog box are two buttons: 'Cancel' and 'Instruct'.

## Resource List - Mobile phone column added.

### Why is it useful?

A simple but useful change to the Resource list will allow the user to view the mobile number of the resource from the list to save clicking into the details page.

### Details:



The screenshot shows a web application interface for 'Resources - Internal Team and Contractors'. At the top, there is a navigation bar with the 'logo!' and a '+ New' button. Below this is a filter bar with dropdown menus for Trades, Regions, Team Test, Ranking, Resource Type, and Schedule Of Rate. The main content is a table with columns: Name, Type, Trades, Team Test, Regions, Town, Mobile, and Compliance Type. A red box highlights the 'Mobile' column, which contains the following data:

Name	Type	Trades	Team Test	Regions	Town	Mobile	Compliance Type
Elec - contractor1@contractor.com	Mark Test	Electrical		Ennis Road, Gabo test #1332			Pending
Elec Daniel Resource	Internal	Electrical		Limerick			Pending
Gabriel Contractor	Contractor			Gabo test #1332		857842015	Pending
terlathTestResource	Contractor			All Regions			Pending
John McGill	Contractor					+353 863001112	Approved
john@contractor.com	Internal						Pending

## Contractor Quotes - Delete quote and change task number.

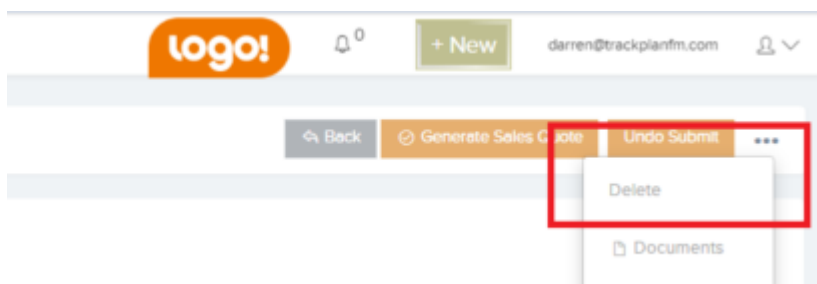
### Why is it useful?

A new feature driven by a client to allow a user (with the permission) to delete a quote up to approval status. This will keep your quotes list clean and tidy and reduce confusion among users.

The user will also now have the ability to edit the quote header and change the task number, if the quote refers to a different task number.

### Details:

**On the Contractor Quote details page, navigate to the triple dots in the top right of the screen to Delete the quote.**



## Edit the Quote Header to change the Task number.

Contractor Quote

Quote No. 176-010

Job Task No. 176-001

Job No. 176-001

Resource sajithcontractor@contractor.com

## Asset page improvements.

### Why is it useful?

Another simple change to the Asset Details page. We now show the Site Type and Region dropdowns above the Site Name. A very useful feature for Clients with thousands of sites. The user can then reduce the search by selecting the region and site type before selecting the site that the asset is on.

### Details:

Asset Details

**Air Conditioning 333**  
Asset Name

Asset Details Jobs (2) Planned Schedules Documents (10) Forms (3) Asset Attributes Stock Levels Asset Stocks

Description	Air Conditioning 333
Asset Class	HVAC
Asset Sub Class	
Asset Number	a333
Model Number	
Serial No.	
Manufacturer	

Client Contract	
Site Type	Building
Region	Limerick
Site Name	10-45 1045
Location	
SubLocation	

## Edit Job Alerts

### Why is it useful?

We have made a lot of improvements to job alerts in recent months. In this release you can now change an already created alert. A new job note is created to record the update to the alert, and an alert email can be sent out for the updated alert.


### Details:

1342 Berlin Instructed Requested at SubLocation: Leo

Job No. Site Status Details

Job Details Job Tasks(1) Visits Costs Quotes Assets Documents Alerts (1) Forms (1)

#### Job Alerts

Task No.	Assigned To	Date/Time	Type	Act
User	Team	Resource		
 1342-001	3rd September Electricians	12/10/2023 13:26	Leave task Out of Bounds	qqq

10 Items Per Page

#### Edit Alert

Task: 1342-001

Alert date/time: 12/10/2023 13:26

Alert Type: Leave task Out of Bounds

Action Required: qqqq

Assign To Everyone

Assign To User: 3rd September

IsAssignedTeam: Electricians

Assign To Resource: sajthcontractor@contractor.com

Due Date:



