



Release 25th January 2024

SUMMARY

Key Features & Improvements:

- Single App replacing 3 apps (resource, manager, request)
- Prepopulate inspection forms with assets from site or location
- Job Email Notifications on key events. More control over who receives which emails.
- Forms QR Codes – Set multiple QR codes for each form. Each QR code can be linked to a site, an asset, or a location.
- App – control which sidebar options in resource module of app
- Resources / contractors – set their office hours and special text to appear on the new job and job page for each resource.
- User Setting: Can only view resources and teams for their teams - split out into 2 settings.
- Client Contract number on Job cost grid in Finance.
- Print Job button – send email to job contact and set job sub status.
- Print Job PDF – Add job cost table and job sales items table to PDF Template
- Client Contracts - Scheduled Reports.
- Job List - Costs and Sales columns added.

Main Application v23.8.0

Manager App v12.2.0

Resource App v12.4.0

Request App v2.3.3

NEW Mobile App v1.0.0

Release timetable

Date and Time of Release	Which Servers
25/01/2024 From 9pm (GMT)	app.trackplanfm.com d**o.trackplanfm.com h*****b.trackplanfm.com
26/01/2024 From 11am (GMT)	app2.trackplanfm.com app4.trackplanfm.com axxxxk.trackplanfm.com
29/01/2024 From 9pm (GMT)	app3.trackplanfm.com s****y.trackplanfm.com

Coming Soon in Future Releases:

- Job Request Authorisations. Work Started. Q1 2024
- Price Catalogue. Set prices by service for job costs and quotes. Q1 2024
- User Management. Can set password policies and MFA across users. Q1 2024
- Job Request ratings. Clients can rate the job once complete. Q3 2024
- Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings. (2024)
- Room and Asset Booking (2024)
- Graphs and charts for Form results (2024)
- View and interact with PDFs and image. Great for seeing your assets on floorplans etc. (2024-2025)

Work done for this Release.

Single App replacing 3 apps (resource, manager, request)

Why is it useful?

One URL for all 3 app modules (Manager, Requestor & Resource)

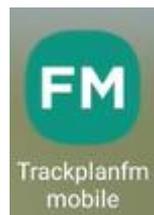
<https://mobile.trackplanfm.com/>

Like our OLD apps you DO NOT download this app from the Apple or Play store. This is a web-based app. (We will be running all versions of the apps for a number of months and notifications will be sent to give all users/resources enough time to make the change)

In a web browser on their device (phone or tablet or even laptop - also see the point below for the correct browser), you to go to the URL: <https://mobile.trackplanfm.com/>

Very Important - For Android devices, make sure you use Chrome. For Apple devices make sure you use Safari.

If from a phone or tablet, then you will be invited to add the app to your home screen - a green icon with FM in the middle and 'Trackplanfm mobile' underneath will appear on the device.



Details:

The system will recognise your credentials and know if you are a Requestor, Manager or Resource on the Trackplan system.

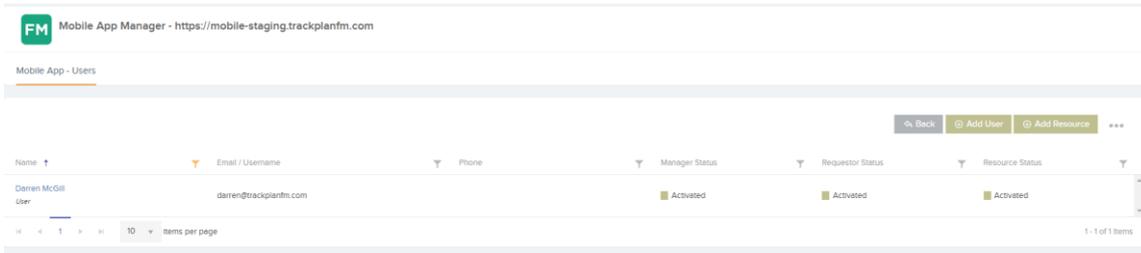
Points to note.

A **user** on the system (set up in the Users module in the Settings area) can now be all 3 with the same email address. (Requestor, Manager & Resource). Of course, the User will need to be set up in the Resource area also.

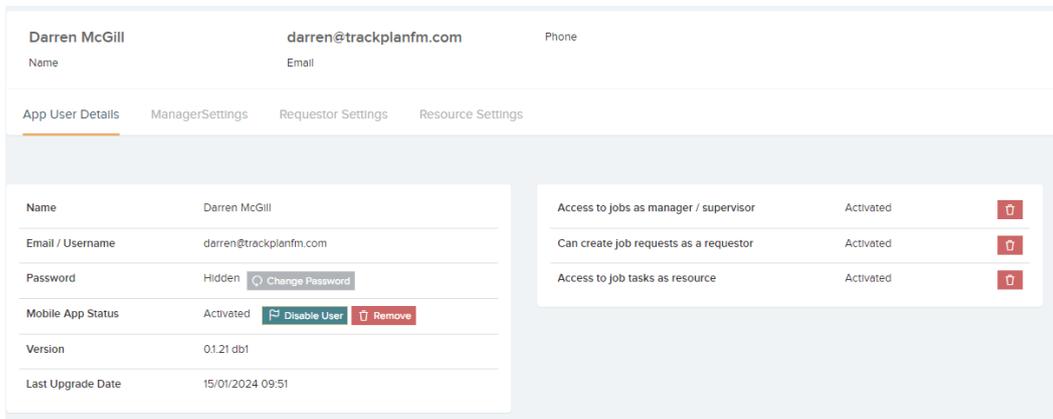
A **Resource** on the system (set up in the Resource module from the sidebar) can still only have access to the Resource platform within the new mobile app.

It would be uncommon that a user would be all 3 but the option is there now. Ideally a person would either be a Requestor (Only have the ability to raise requests), a Manager (View requests & jobs, assign jobs etc) or a Resource (Internal or external worker with access only to the tasks that have been Instructed to them.)

Keep track of all App activations via Settings → App Manager. Here you can see what app module each user/resource has access to.



Clicking on the person's name will bring you to the details page of the user/resource where you can activate/deactivate the app modules.



More information will be available on <https://caf.m/fm/> soon.

Prepopulate inspection forms with assets from site or location

Why is it useful?

This new feature will eliminate missing assets from checks as they will be automatically added to your electronic checklist thus helping with your overall compliance on site.

Details:

We have developed this using the Asset question type and the repeatable section feature in the Form Designer.

1. When designing your form in the Form Designer you will need to have your section set as Repeatable.

Description	Order	Is Repeatable	No of Questions	
Main	1	true	12	  

[? Help](#)

2. Your first question on the form should be your Asset Question. The pencil icon beside the Question Type lets you configure your options. Here we can set a specific Asset Class and Sub class and set Prepopulate Asset to Yes.

Edit Asset Question Settings Back Save

Include Select By Dropdown

Include Create Asset

Include Scan Asset

Asset Class

Asset Sub Class

Prepopulate Asset

3. Let's say you have 20 HVAC units on site. When you attach your form to the planned or reactive job the system will run and generate the 20 prepopulated sections on the form. Each section will have the Asset name and code and the list of the checks/questions you added to your form. Depending on how you designed your questions (Is Required) the user/resource will not be able to submit the form until all 20 assets are checked.

Job Email Notifications on key events. More control over who receives which emails

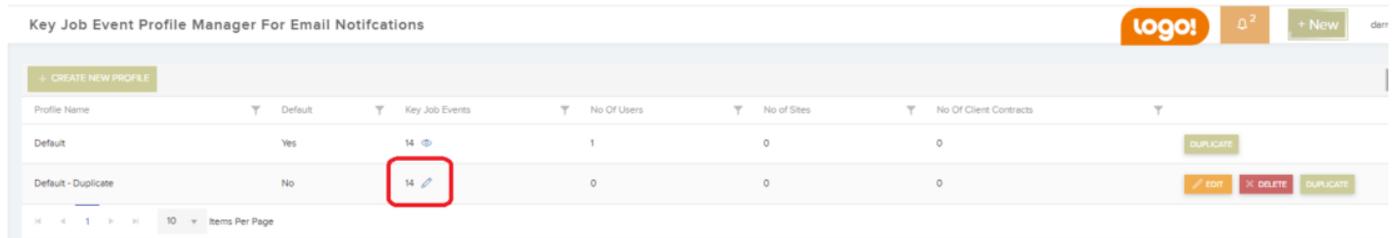
Why is it useful?

Our new 'Key Job Event Profile Manager for Email notifications' will bring more clarity and visibility around what emails are going to be sent to requestors, users, site contacts and job contacts.

Details:

The new profile manager can be found in the Settings area under the filter 'Communications'.

Here you have the default Trackplan Job Event profile that you can duplicate and add or remove from the 86 different types of job notifications by clicking the pencil icon.



Profile Name	Default	Key Job Events	No Of Users	No of Sites	No Of Client Contracts	
Default	Yes	14 	1	0	0	DUPLICATE
Default - Duplicate	No	14 	0	0	0	EDIT DELETE DUPLICATE

Once you have set up you new profile(s), you can then set this in 5 different places in the system.

1. The Job details screen. (In the 'Contact name' panel). Set the profile for the job contact.
2. On the Site Details screen. (Under the 'Main Contact' panel). Set the profile for the site. Job Contacts will inherit this setting for the job's site.
3. In Settings → Job Requests → Email Notifications to Requestor. Set the profile for the people creating job requests.
4. In Users → Email & Notification Settings → Job / Task Email Settings. Set the profile for each user.
5. In Client Contracts → Contact Information. Set the profile for each contract. Sites will then inherit this setting for the contract's site.

Forms QR Codes – Set multiple QR codes for each form. Each QR code can be linked to a site, an asset or a location.

Why is it useful?

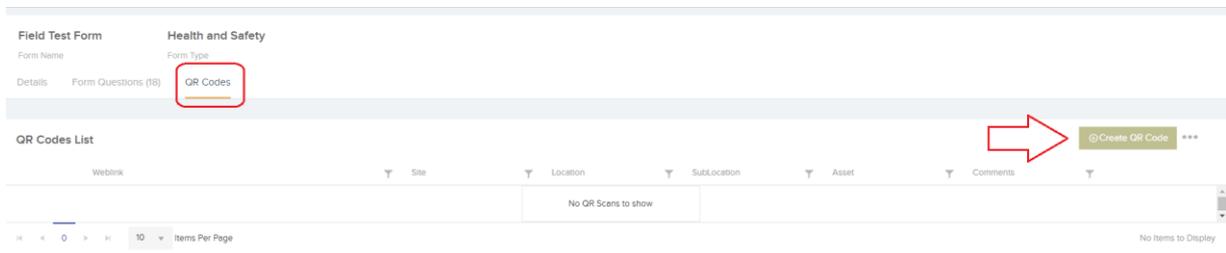
A very useful addition to the electronic forms module where you now have the ability to generate one or more unique QR Codes for your forms. When scanned from their device (outside of the Trackplan app) it will take the person to the form where they can complete and submit it. Similar to when a form is sent by email.

Great for toilet cleaning for example, to record the daily visits and cleans in different locations, Contractor check in on site or accident report forms.

Details:

We have added a new tab in the form designer 'QR codes' where you can generate your codes.

The codes can be associated to a Site/Location, an Asset, or Stand Alone.



App – control which sidebar options in resource module of app

Why is it useful?

These new settings will help simplify the Resource App module by showing very few options other than the Task list and Calendar view on the sidebar.

Details:

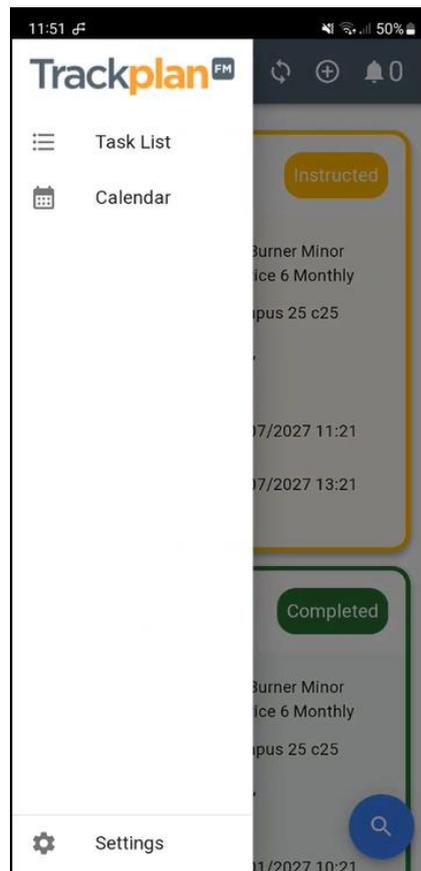
1. New settings in the Portal & App tab on the Resource Details view.

Show Sites in Sidebar Yes No

Can view Storage areas Yes No

Can View Form Library Yes No

2. A nice clean sidebar to stop confusion.



Resources / contractors – set their office hours and special text to appear on the new job and job page for each resource.

Why is it useful?

This new feature is all about giving the user more visibility of the important Resource details when creating a new job and on the job details page.

Details:

1. On the Resource details page, you can now set an out of office hours phone number, working day start & end times, and office hours working days.

Phone number out of office hours	<input type="text" value="0861234567"/>
Working Day Start	<input type="text" value="09:00"/> ⌚
Working Day End	<input type="text" value="18:00"/> ⌚
Office hours working days	<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday

2. Again, on the Resource details page, we have 2 new settings and 2 new customised messages that will appear when creating a new job or on the job details screen.
 - Restrict when job can be created for resource – A user will not be able to raise a job against this resource based on the selected option.
 - Show customised phone number message on job pages - Based on the selected option, a customised message will appear when this resource is selected on the create a new job screen and the job details screen.

Restrict when job can be created for resource	<input type="text" value="Always"/> ▼
Show customised phone number message on job pages	<input type="text" value="Always"/> ▼
Customised Phone Message	<input type="button" value="Edit"/>
Customised Message on Job Pages	<input type="button" value="Edit"/>

Create a New Job screen:

If I try to create a job and choose the resource 'Darren McGill', I am restricted from doing so and directed to the customized phone message I created.

Create a New Job

Did you consult management before raising the job?

Required Job Information Upload Save

Job Details

New Job

Client Contract (Please Select)

Site Name Campus 25

United Kingdom

Location (Please Select)

SubLocation

Reported By

- Burhan Manager
- Burhan Resource
- BurhanR
- Darren McGill**
- Elec - contractor@contractor.com

Job Type

Sub Type

Priority

Resource

Instruct Resource

Assigned Abilash test

Create a New Job

Please call the Resource directly to raise this job as it is Out of office Hours

- Phone No
- 0861234567 - Phone number out of office hours
- 0861234567 - Mobile
- Monday, Tuesday, Wednesday, Thursday, Friday - Office hours working days
- 09:00 - Working Day Start
- 18:00 - Working Day End

Job Details Screen:

If I am successful and the job is created, my customized message will appear under my resource.

Team Test Advisors

Assigned To

Resource **Darren McGill** Re-Allocate

Resource important details

- Phone No
- 0861234567 - Phone number out of office hours
- 0861234567 - Mobile
- darren@trackplanfm.com - Email
- Call if an emergency - Notes/Comments of the resource
- Monday, Tuesday, Wednesday, Thursday, Friday - Office hours working days
- 09:00 - Working Day Start
- 18:00 - Working Day End

Instructed Task 1604-001 Instructed

Instructed Date 17/01/2024 10:01 Resend

User Setting: Can only view resources and teams for their teams - split out into 2 settings.

Why is it useful?

The original setting above was good but some clients' needs a little more, so we have improved this by creating 2 new settings in Users → General Settings.

Details:

1. Can only view resources for their teams - Set this to YES and this user can only view and select Resources from their own teams.
2. Can only view teams for their teams - Set this to YES and this user can only view and select Teams from their own teams.

Job Workflow Settings	
Can Jobs Be Assigned To This User	Yes
Can Assign Jobs	To All Users
Access To Jobs	All Jobs
Can only view resources for their teams	No
Can only view teams for their teams	No
Can Authorise Jobs	No
Can Approve But Not Complete Job	No
Can Approve Contractor Quote	No
Job Type Group	Sales Department
Hide Resource Details	No

Client Contract number on Job cost grid in Finance.

Why is it useful?

Just a simple but important addition to the main cost grid in Finance → Job costs. We have added the Client Contract number as a column. This is hidden by default, so it is available via the triple dots in the top right of the grid.

Details:

Use the column configurator and check the box beside the name of the column that you want and click Save Columns. (You may need to reload the view to reconfigure the grid)

The screenshot displays the 'All Job Costs' interface. At the top, there are filters for 'Reactive / Planned', 'Open / Closed', 'Cost Status', and 'Sales Margin'. Below these is a table of job costs with columns for 'Job #', 'Job Status', and 'Job Information'. A 'Columns' menu is open, showing a list of columns with checkboxes. The 'Client Contract Number' checkbox is highlighted with a red arrow. The 'Save Columns' button is highlighted with a red box. The 'Client Contract' checkbox is also checked. The 'Items Per Page' dropdown is visible at the bottom right.

Job #	Job Status	Job Information
1590		1590-0
1583		1583-0
1583	Instructed	
1581	Instructed	1581-001
1577	More Work Required	1577-001

Print Job button – send email to job contact and set job sub status.

Why is it useful?

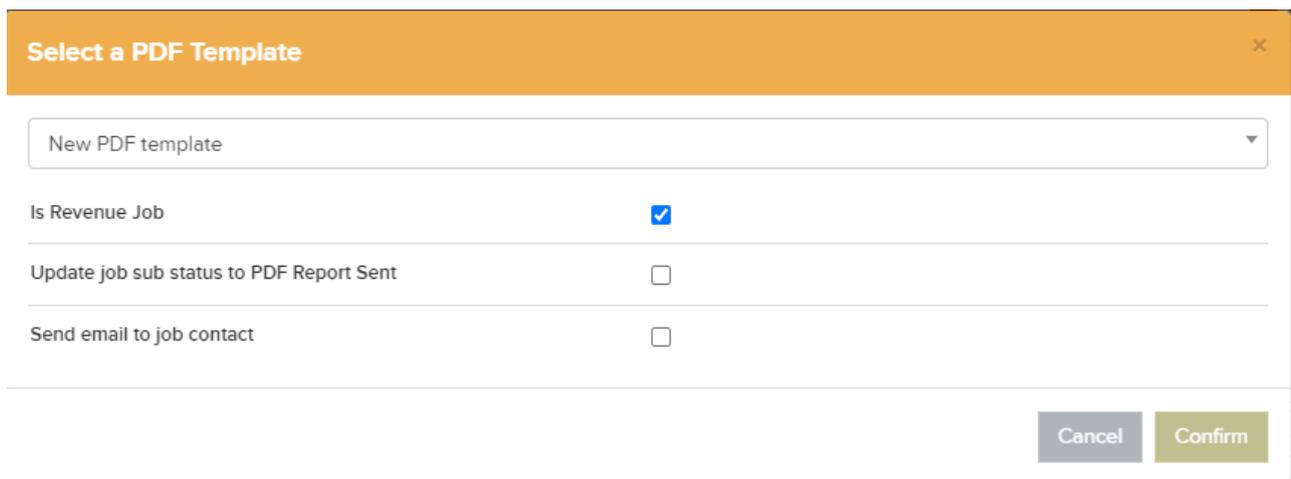
A nice new feature that gives you more options when printing a job to PDF. The user can select their PDF template as they can do now, and then choose:

1. Update the jobs sub-status to PDF Report Sent
2. Send an email to the Job contact. (Of course, the email will contain the PDF document.)

Will help clients wanting to send PDF reports or even Draft sales invoices to their clients.

Details:

On the job details page click the triple dots on the top right of the screen (beside the edit button) and then click print. You will then see a pop up with the options to choose from.



Select a PDF Template ×

New PDF template ▾

Is Revenue Job	<input checked="" type="checkbox"/>
Update job sub status to PDF Report Sent	<input type="checkbox"/>
Send email to job contact	<input type="checkbox"/>

Cancel Confirm

Print Job PDF – Add job cost table and job sales items table to PDF Template

Why is it useful?

This new feature allows the user to add the job's cost and/or sales values as a table to both the 'Print Job' and the 'Print Job Task' PDFs.

You may have need to create 2 separate PDF templates and have the costs table on one and the sales table on the other.

Details:

There PDF template can be designed in Settings → Job Settings and the new tags are found in the Help card.

The screenshot displays two sections for editing PDF templates. The first section is titled "Print Job and Instruct Job Worksheet PDF" and shows a dropdown menu for "PDF Template for Printing Job and Job Instruct Worksheet" set to "mark v2", with a "PDF Template Editor" button and a "Help" link below it. The second section is titled "Print Job Task and Job Task Completion PDF" and shows a dropdown menu for "PDF Template for Printing Job Task and Job Completion Report" set to "mark v3", with a "PDF Template Editor" button and a "Help" link below it. At the bottom, a table lists the tags: "[JobCostItems:Sales]" and "[JobCostItems]", with their respective descriptions: "Displays all the sales in a job" and "Displays all the costs in a job".

[JobCostItems:Sales]	Displays all the sales in a job
[JobCostItems]	Displays all the costs in a job

Client Contracts - Scheduled Reports.

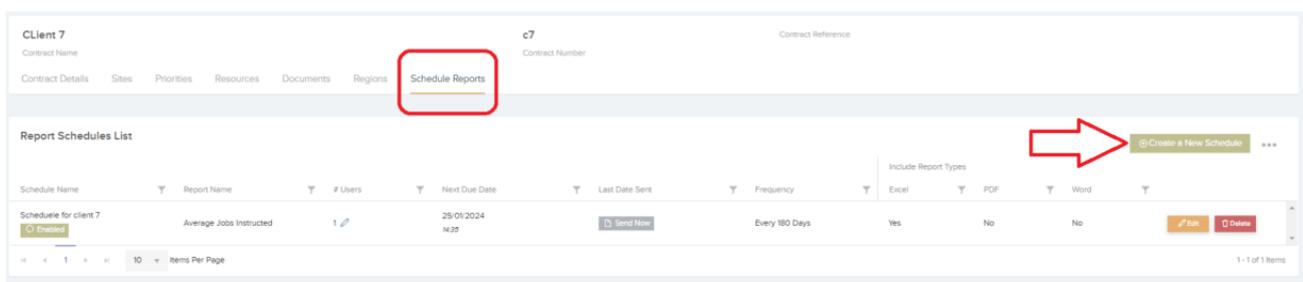
Why is it useful?

This new feature is a great day to speed up and automate how you can report to your clients on a frequent basic.

Details:

Very like how you can schedule reports in the Reports Module, you now have the 'Schedule Reports' tab in the Client Contracts area.

Here you can view existing schedules, create a new schedule and assign the users you want to receive the report.



Clicking 'Create a New Schedule' you will be directed to a pop up where you can name your new schedule, choose the desired report, set your frequency and select what type of file will be attached to the email sent.

Create Report Schedule ✕

Schedule Name

Report Name

Frequency

Send From Email

Display Name For Email

Next Due Date

Include Excel

Include PDF

Include Word

Job List - Costs and Sales columns added.

Why is it useful?

These new columns on the job list bring more visibility to the reporting and tracking of cost and sales values on one of the most important grids in the system.

Details:

These new costs and sales columns are hidden by default. You will need to activate them if needed.

Using the column configurator, check the box beside the name of the column that you want and click Save Columns. (You may need to reload the view to reconfigure the grid)

Sales columns will not appear unless enabled for client. User must have access to finance area and view costs otherwise these columns will not appear in column configurator.

The screenshot shows the 'Job List' interface with the 'Columns' menu open. The menu lists various columns with checkboxes: Asset Comments, Asset Status, Current Asset Status Changed Date, Previous Asset Status, Previous Asset Status Changed Date, Order Number, Project, Job Budget, Cost Labour, Cost Materials, Costs Other, Total Cost, Sales Labour, Sales Materials, Sales Other, Total Sale, Cost Average, Sales Average, Reported Cost, Reported Sales, and Revenue Job. The 'Save Columns' button is highlighted with a red box, and a red arrow points to the 'Columns' menu item.

<https://caf.m.fm/> will be updated soon with tips and instructions on the new features.