



Release 6th June 2024

SUMMARY

Key Features & Improvements:

- Planned Schedules redesign, improvements and add items to schedules more easily
- Upload Centre – Big Improvements. Can see history of previous uploads plus more.
- Resource Page – redesigned and KPIs added.
- Client Contracts – redesigned, sales budget added, KPIs added, controls added.
- Site Page – redesigned and more Calculated areas and capacities improved
- Job and Task new KPIs – First Time Fix and Attendance on Time
- Form QR Codes – Can now print QR codes associated to forms.
- Sites, Locations and sublocations – more control over deletions
- Printing Dashboards – PDF generated now much better.
- Auto resource selection for new jobs – can combine both methods with throttling
- Job Note – Sending Emails. Can select job creator, assigned user and job contact.
- New Form Setting - Can choose to NOT send form to resource when job instructed
- New job – can assign the Client Contract's contact as the job contact.
- Users Delegations – User can delegate their role to another user for a time period.
- User Audit Trail – History of user actions now visible in Settings area.
- Job Calendar and quotes grids – new filter added for Projects.
- Job Tasks Report – new columns: job number, statuses, sub type, region, contract
- Job Cost Report – Finance codes and resource codes added.
- Job Page – can add a custom weblink for a job by editing job or using Message Box
- Job Page – The collapsible panels remember the state for the last time used.
- SMS Messages – Now supports all characters. SMS shortened with weblink.

- Reports – new report added for Contractor Quotes.
- Reports: Cost and Sales Stage filters. Previous 12 months added to date filters.
- Reports - SFTP – filename and authentication by private key
- QR codes – Printing QR codes. Grid filters now work.
- Message Box – New tags for job description and teams.
- Message Box - New action rule for Approve Contractor Quote
- Pending Job Requests Report – Can choose from name and email address.
- Authorisation Bands for Purchase Orders, Quotes and Projects – Improvements
- Sales Quotes – Can easily add Job Contact when sending sales quotes by email.
- Sales Quotes – Can now added item from price catalogue when creating new quote
- Planned Schedules – Can now select job sub-type as well as job type.
- Planned Schedule Weekend setting – Can now include Friday, Saturday, or Sunday.
- App – Can ask for project and job category on new job screen.
- App – Edit asset can Scan QR code quickly to associate to new QR code.
- App - Documents now display according to the public / private setting
- App – Free text search now available when finding a resource.
- App – Request app – Can make photos mandatory on new request.
- App – Request app – Can ask for priority or expected dates.

Versions:

Main Web Application v23.10.0

Mobile App v1.4.0 (NEW)

Manager app: 12.3.0 (No changes)

Resource app: 12.5.0 (No changes)

Requestor app: 2.3.3 (No changes)

Please note all app improvements and fixes are being made to the New Mobile App. Please move to the new app and away from the old apps as soon as possible.

<https://caf.m.fm/article/how-do-i-get-the-apps/>

Release timetable	
Date and Time of Release	Which Servers
06/06/2024 From 9pm (GMT)	app.trackplanfm.com app2.trackplanfm.com app4.trackplanfm.com
07/06/2024 From 9pm (GMT)	app3.trackplanfm.com s****y.trackplanfm.com axxxxk.trackplanfm.com
10/06/2024 From 9pm (GMT)	d**o.trackplanfm.com h*****b.trackplanfm.com

Coming Soon in Future Releases:
<ul style="list-style-type: none"> - Google Single Sign On. Q3 2024 - SFG20 integration – Comprehensive library of Planned maintenance schedules and checklists. Work starting May 27th, 2024. Completed in Q3 2024 - Resource Contracts – can set multiple contracts for each resource with timeframes, sites and assets covered etc. Q3 2024 - Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings. Q3 2024 - Spaces – To offer infinite hierarchy of locations within each site. Q3 2024 - Stock Requests and Assignment of Storage Areas to users and resources. Q3 2024 - Room and Asset Booking (Q4 2024) - Graphs and charts for Form results (Q4 2024) - Job Request ratings. Clients can rate the job once complete. Q4 2024 - View and interact with PDFs and image. Great for seeing your assets on floorplans etc. (2025)

Work done for this Release.

Planned Schedules redesign, improvements and add items to schedules more easily

Why is it useful?

We have simplified the Planned Scheduled Details screen and added multiple tabs along the top of the screen to improve visibility and ease of use of our Planned Maintenance Module.

On the items tab you can see all the sites, locations or assets attached to the schedule and quickly add a new item to the schedule.

Details:

Create, Edit and details screen reduced to 2 columns.

Create a New Schedule

Schedule Name

Schedule Code

Compliance Type

(Please Select)

Schedule Category

(Please Select)

Is Activated

☒

Help

By Site, Location or Asset

(Please Select)

Client Contract

(Please Select)

Region

(Please Select)

Schedule Scope

Central - Can Attach Multiple Items

Frequency

Annually

Start Date

03/06/2024 13:37

End Date

If an End Date is set, jobs will not be generated after this date.

Help

Schedule Type

Regular

Job Creation Behaviour

Only create job after current open job is completed

The next job can only be created once the current open job is completed and the next due date becomes due. For "Sliding" schedules the next due date will be set one period on from when the current job is completed.

Create Next Job Immediately

☒

Ignore Weekends

☐

Individual tabs to help build and manage your Planned Schedule.

Annual Inspection

All

Schedule Name

Schedule Code

Schedule Details

Job Details

Attached Items (0)

Forms (1)

Documents (1)

Linked Schedules

Schedule Name

Annual Inspection

Schedule Code

All

Compliance Type

Statutory

Schedule Category

Is Activated

Yes

Help

By Site, Location or Asset

Site

Client Contract

Region

Schedule Scope

Central - Can Attach Multiple Items

Help

Frequency

Annually

Start Date

28/09/2022 11:55

End Date

Help

Schedule Type

Regular

Job Creation Behaviour

Only create job after current open job is completed

The next job can only be created once the current open job is completed and the next due date becomes due. For "Sliding" schedules the next due date will be set one period on from when the current job is completed.

Next job created as soon as last job completed

Ignore Weekends

No

Help



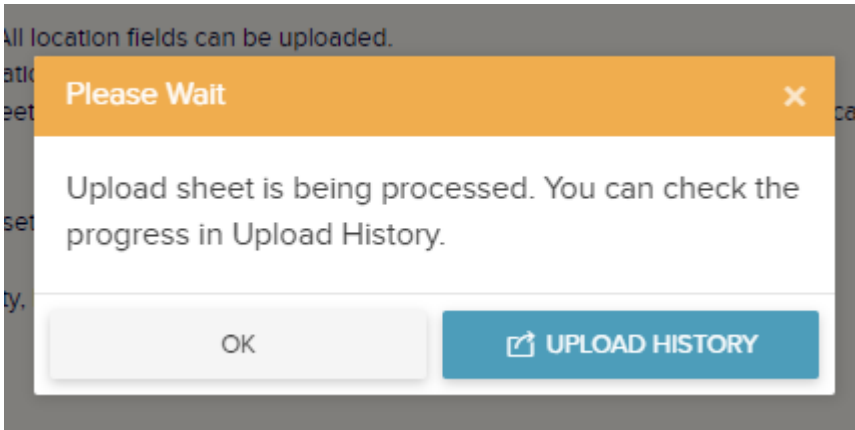
Upload Centre – Big Improvements. Can see history of previous uploads plus more.

Why is it useful?

As our Upload Centre is getting used more and more. We have made improvements so users can now have better visibility on errors and history of all uploads on their system. And see the spreadsheets used in previous uploads.

Details:

No more loading screen. You can now keep using the system and your items will be loaded in the background.



Check progress, view errors & warnings and download data easily from the new Upload Details list. A notification will also be sent to the user when upload is complete.

Upload Type	Start Date	Completed Date	Uploaded by	# Rows In Sheet	# Rows Loaded Successfully	# Errors	# Warnings	
Stock	27/05/2024 13:49	27/05/2024 13:49	darren@trackplanfm.com	257	257	0	0	<button>DOWNLOAD</button>
Assets	16/05/2024 12:48	16/05/2024 12:48	gr	1	0	1	0	<button>VIEW ERRORS AND WARNINGS</button> <button>DOWNLOAD</button>
Assets	16/05/2024 12:43	16/05/2024 12:43	gr	9	0	0	0	<button>DOWNLOAD</button>
Resources	19/04/2024 15:09	19/04/2024 15:09	mark@trackplanfm.com	4	4	0	0	<button>DOWNLOAD</button>
Resources	19/04/2024 13:53		mark@trackplanfm.com	4	0	0	0	
Resources	19/04/2024 13:53		mark@trackplanfm.com	4	0	0	0	
Sites	16/04/2024 17:13	16/04/2024 17:13	mark@trackplanfm.com	4	4	0	0	<button>DOWNLOAD</button>
Resources	16/04/2024 17:01	16/04/2024 17:01	mark@trackplanfm.com	4	1	3	0	<button>VIEW ERRORS AND WARNINGS</button> <button>DOWNLOAD</button>

Resource Page – redesigned and KPIs added.

Why is it useful?

The redesign of the Resource details makes the most important details clearly visible on the screen and other setting hidden in a collapsible panel. And useful KPIs have been added in relation to that resource

Details:

Redesigned Details screen.

Darren McGill

Resource Name

...

Resource Address

Off Duty

Availability Status

Pending

Compliance Status

Details

Regions & Trades

Online Portal

Documents

Qualifications (2)

Availability

Contacts

Forms

Billing

Stock

Custom Fields

Important Information

Other settings

Resource Name

Darren McGill

Resource Type

Internal

Code

Contact Name

Darren McGill

Notes

Call if an emergency

Created

11-01-2024 09:31

Email

darren@trackplanfm.com

CC Email Address

Phone

Mobile

+353 891234567

Phone number out of office hours

0861234567

Fax

Colour

Availability Status

Off Duty

Compliance Status

Pending

Team Test

No Teams

Performance KPIs

Position Now KPIs

Cost Summary

Job Instruction

Help

Other job and cost settings

Help

Job Reminders

Send Reminder Soon After Job Expected Date

No

Send Reminder One Day After Job Expected Date and Thereafter

No

Job Reports

Enable Scheduled Job Reports

Send Report Now

Last Time Sent

Report Next Send Date

11/01/2024 09:30

Report Frequency

5

Help

KPIs added to keep better track of contractor performance.

Performance KPIs	
# Tasks Instructed	3
# Tasks Completed (Total)	0
# Tasks Completed (SLA Met)	0
# Quotes Submitted	0
# Quotes Approved	0
These KPIs look at all jobs, tasks and quotes since time 0.	

Position Now KPIs	
# Open Jobs With Open Instructed Tasks	3
# Open OverDue Tasks	3
# Open Jobs at Contractor Confirmed Complete	0
# Quotes Pending Submission	0
# Quotes Awaiting Approval	0
These KPIs are looking at current state of jobs and tasks regardless of when they were created.	

Cost Summary	
Aggregated Costs by Cost Stage	
WIP	0.00
Accrual	0.00
Contractor Invoiced	0.00
Value of Quotes Submitted	0.00
Value of Quotes Approved	0.00
These KPIs look at all jobs, tasks, costs and quotes since time 0.	

Client Contracts – redesigned, sales budget added, KPIs added, controls added.

Why is it useful?

The redesign will help users view and update key information with regards to the client contract. We have also added useful KPIs and enabled settings for workflow and notifications around the client contract.

Details:

New Design. (3 columns instead of 2, Sales Budget fields and Settings tab added)

Client 4

Contract Name

c4

Contract Number

Contract Reference

Contract Details

Sites

Priorities

Resources

Documents

Regions

Schedule Reports

Users

Settings

Contract Information

Contract Name

Client 4

Contract Number

c4

Contract Reference

Is Active

Yes

No of Sites

0

Contracts Logo

Comments

Team

Not Selected

Default Job Budget

0.00

Display Text On New Job Page

Colour

Currency

GBP

Receive Email and Notification On Key

Yes

Info and Toxic Counter

Contract Information

Contract Name

Email

Telephone

Address 1

Address 2

Town

County

Country

United Kingdom

Postcode

Dates

Start Date

End Date

Date Created

28/08/2023

Created By

mark1 m

Cost Budget

Cost Budget

0.00

Job Costs

0.00

Purchase Orders

0.00

Remaining Cost Budget

0.00

Sales Budget

Sales Budget

0.00

Job Sales

0.00

Remaining Sales Budget

0.00

KPIs added.

KPIs	
# Job Created	0
# Job Completed	0
Aggregated Costs by Costs Stage	
WIP	0.00
Accrual	0.00
Invoiced	0.00
Aggregated by Sales Stage	
WIP	0.00
Accrual	0.00
Invoiced	0.00

Site Page – redesigned and more Calculated areas and capacities improved

Why is it useful?

The site page has had a redesign to better present key site information to the user. We have also improved and extended the calculation of areas and capacities from locations and sublocations.

Details:

Site Details screen.

Berlin

Site Name

Town

Germany

Address

Country

Site Details

Locations (4)

Planned Schedules (5)

Assets (8)

Documents (167)

Forms (320)

Contacts

Custom Fields

Main Sites List

Edit Site

New Job

Site Name

Berlin

Code

12345

Client Contract

Not Selected

Region

North

Site Type

Building

Operational

Yes

Address 1

Address 2

Town

Country

Country

Germany

Postcode

Resources Due Today

#

↓

No Of Resources Due Today

↓

No Of Resources On Site

↓

No Jobs

10

Items Per Page

No Items to Display

Help

Site Comments

Site Warning Flag?

No

Site Warning Note

Contractor Note

Default Email Template to Resource on Instruct

Not Selected

Main Contact

Gabriel Espinoza Rojas

Email

gespinoza.rojas97@gmail.com

Telephone

+50658867421

Fax

Enable Key Job Event Notifications

No

Key Event Notification Profile

Open Jobs

110

Overdue

53

Non Compliant

28

Open Requests

6

Miscellaneous

QR Code -4hMTSMmvav5KhE-6rNO1

Site Area

0

▼

Capacity

0

📄

Restricted Capacity

0

Assigned User

Not Selected

Team Test

Not Selected

Colour

#9e1515

Calculated areas and capacities improved.

Site Area

0

▼

Calculated Area

0

Calculated Area - SubLocation

0

Calculated Area - Total

0

Capacity

0

▼

Restricted Capacity

0

Calculated Capacity

0

Calculated Capacity - SubLocation

0

Calculated Capacity - Total

0

Calculated Restricted Capacity

0

Calculated Restricted Capacity - SubLocation

0

Calculated Restricted Capacity - Total

0

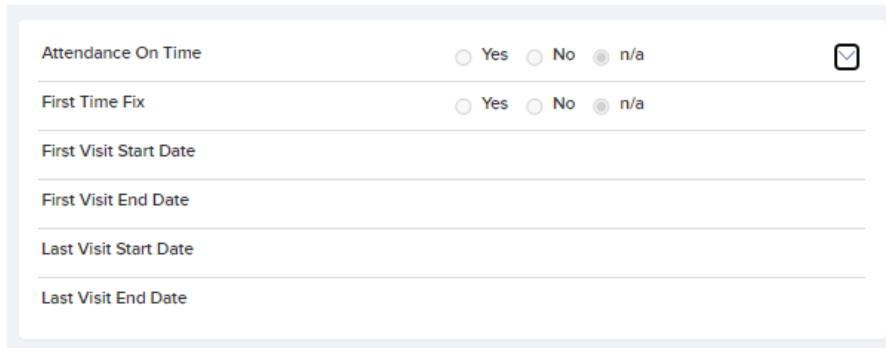
Job and Task new KPIs – First Time Fix and Attendance on Time

Why is it useful?

Gives clear and accurate KPIs on the job details screen and the job task details screen. These are automatically updated when a task is started, or a job or task is completed from the app or portal. They can be overridden and edited by the user in the main application.

Details:

New KPIs dropdown.

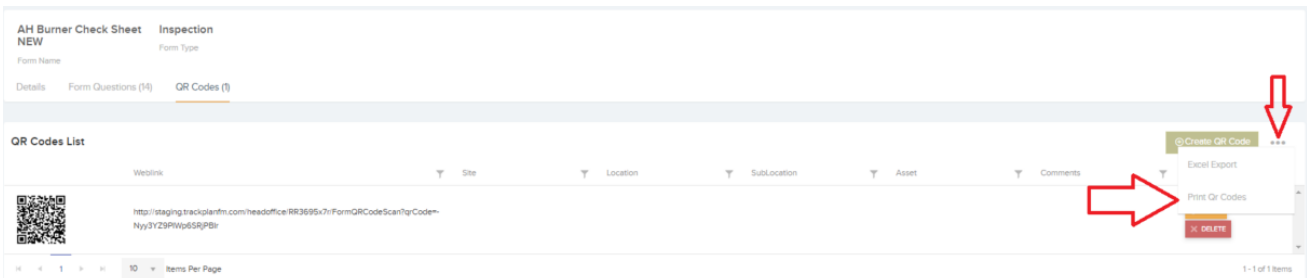
A screenshot of a dropdown menu for KPIs. It contains the following items: 'Attendance On Time' with radio buttons for 'Yes', 'No', and 'n/a' (selected), and a checkbox icon; 'First Time Fix' with radio buttons for 'Yes', 'No', and 'n/a' (selected); 'First Visit Start Date' with a text input field; 'First Visit End Date' with a text input field; 'Last Visit Start Date' with a text input field; and 'Last Visit End Date' with a text input field.

Form QR Codes – Can now print QR codes associated to forms.

Why is it useful?

A simple feature added here so users can easily print the QR code for the electronic form.

Details:

A screenshot of the 'QR Codes List' interface. At the top, it shows 'AH Burner Check Sheet' as the form name and 'Inspection' as the form type. Below this are tabs for 'Details', 'Form Questions (14)', and 'QR Codes (1)'. The main area displays a table with columns: 'WebLink', 'Site', 'Location', 'SubLocation', 'Asset', and 'Comments'. The first row shows a QR code and a long URL. To the right of the table, there are three buttons: 'Create QR Code', 'Excel Export', and 'Print Qr Codes'. A red arrow points to the 'Print Qr Codes' button. Below the table, there is a pagination bar showing '10' items per page and '1-1 of 1 items'.

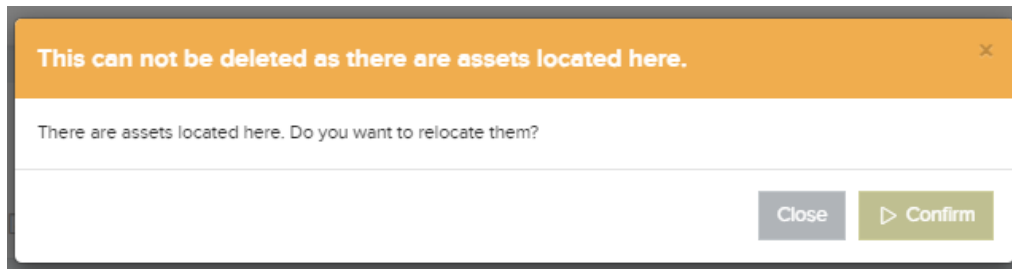
Sites, Locations and sublocations – more control over deletions

Why is it useful?

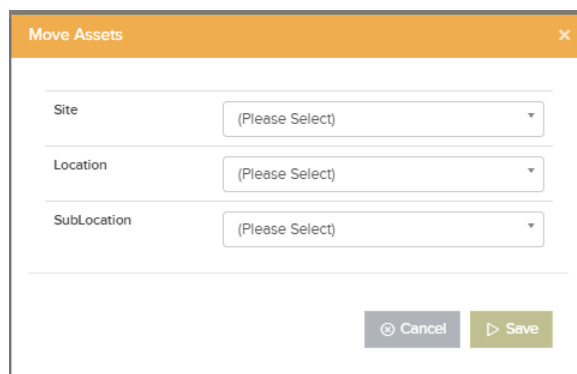
Introducing better controls over deletion of sites. It will help maintain good data and support data integrity on the apps and QR codes or locations and assets.

Details:

New warning notes example.



Ability to relocate your assets to a different site, location & sublocation. When deleting an site or location.

A screenshot of a "Move Assets" dialog box. The title bar is orange and contains the text "Move Assets" and a close button (X). The main content area is white and contains three dropdown menus labeled "Site", "Location", and "SubLocation", each with the text "(Please Select)". At the bottom right, there are two buttons: a grey "Cancel" button with a close icon and a green "Save" button with a play icon.

Printing Dashboards – PDF generated now much better.

Why is it useful?

Many clients want to print the dashboards to PDF which can then be circulated. We have greatly improved how this PDF looks.

Details:

Example Reports Dashboard.

<https://caf.m.fm/wp-content/uploads/2024/03/Dashboard-dashboardreport-5.pdf>

Auto resource selection for new jobs – can combine both methods with throttling

Why is it useful?

There are two ways to auto select a resource when a job is created based on job type, site, region etc. You can now combine both these methods and choose which one takes priority.

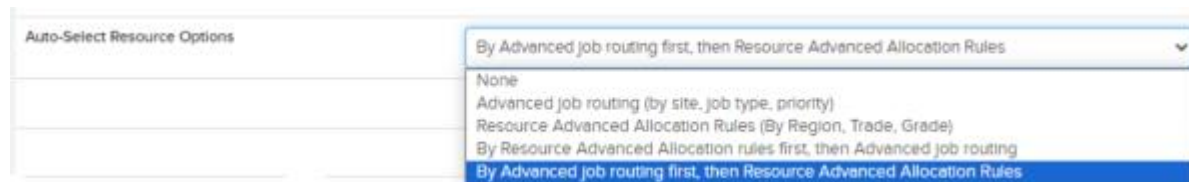
The “job throttling” can now be turned on for both of these methods. Throttling allows you to more fairly distribute work between your resources. It is an advanced feature!

Details:

There are two types of auto resource selection that a client can use:

- Advanced job routing (job type, site, days of week). Most popular and easy to use.
- Resource Advanced Allocation Rules - by Trade, region, grade. More complex to set up but equally powerful.

In Settings – Job Settings – New Job Settings, you choose which combination of these auto resource selection methods you want to use.



The screenshot shows a web interface with a label 'Auto-Select Resource Options' next to a dropdown menu. The dropdown is open, showing five options: 'By Advanced job routing first, then Resource Advanced Allocation Rules' (selected and highlighted in blue), 'None', 'Advanced job routing (by site, job type, priority)', 'Resource Advanced Allocation Rules (By Region, Trade, Grade)', and 'By Resource Advanced Allocation rules first, then Advanced job routing'.

In Settings – Resource Job Throttling, you can set the rules for how the “job throttling” works across your resources.

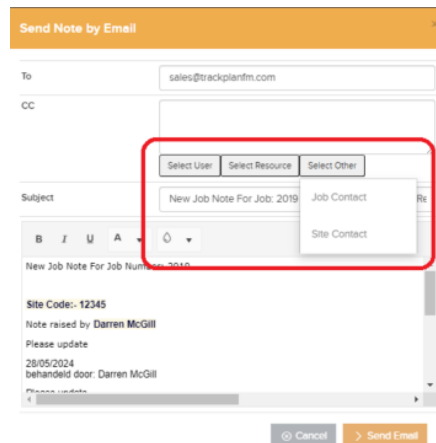
Job Note – Sending Emails. Can select job creator, assigned user and job contact.

Why is it useful?

This will definitely save time for a user when sending job notes by email. You now have multiple options to select a user, resource, site contact or job contact.

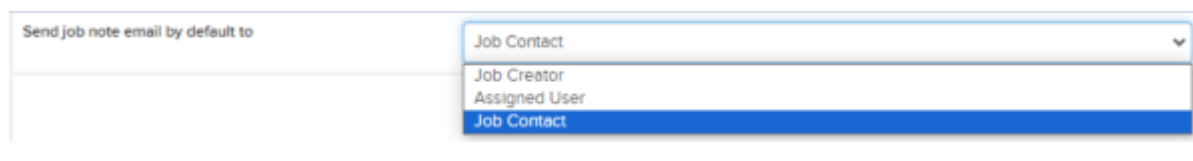
Details:

When sending a note via email.



The screenshot shows a 'Send Note by Email' dialog box. The 'To' field is filled with 'sales@trackplanfm.com'. The 'Subject' field is 'New Job Note For Job: 2019'. A red box highlights a dropdown menu with three options: 'Select User', 'Select Resource', and 'Select Other'. Below the rich text editor, there are 'Cancel' and 'Send Email' buttons.

Note, In Settings – Job settings – Other Settings, you have the option to set your default email address when sending a job note by email.



The screenshot shows a dropdown menu titled 'Send job note email by default to'. The dropdown is open, showing four options: 'Job Contact', 'Job Creator', 'Assigned User', and 'Job Contact'. The 'Job Contact' option at the bottom is highlighted in blue.

New Form Setting - Can choose to NOT send form to resource when job instructed

Why is it useful?

This new feature will 1) eliminate unnecessary forms getting sent to the Resource when instructing a job and 2) make sure necessary forms, already attached to a job will automatically be sent to the resource.

It works in conjunction with the form setting “Attach form to every new job”. So for example, you could design and attach a “satisfaction” form to every new reactive job, but not make sure that it does not also get sent to the contractor!

Details:

New settings in the form designer.

Settings For Job Form

Is Required For Job Completion ☐ Yes ☒ No

Completing Form Completes Job Task ☐ Yes ☒ No

App User Can Add This Form to a Job, Site, Location or Asset ☒ Yes ☐ No

Attach Form to every new Reactive Job ☐ Yes ☒ No

Send Form to Resource on instructing job if form already attached to this job ☒ Yes ☐ No

Form Availability to Sites ☒ All Sites ☐ Selected Sites and Locations only

New job – can assign the Client Contract’s contact as the job contact.

Why is it useful?

This new feature will impact our FM clients using the Client Contracts module and will be a great addition so the relevant client contact information will be attached to the new job as the job contact.

Details:

A new option to an existing dropdown in Settings -> Job Settings.

How to set job contact when job created

Client Contract Contact

Client Contract Contact

Assigned User For Job

Main Site Contact

Users Delegations – User can delegate their role to another user for a time period.

Why is it useful?

When a user is going on holiday, they can delegate their role to one or more other users on the system for a defined period of time. When the other user logs in they will then be invited to login as themselves or as the person who has delegated their role!

Details:

Only users with Full Access can access this new feature in Settings – User Delegations. Create a new delegation by assigning the Delegator & Delegate.

The screenshot shows the 'User Delegations' form. At the top, it identifies the 'Delegator' as Darren McGill and the 'Delegate' as Sajith Sageer. Below this, a 'Details' section is highlighted with a red box. This section contains a table with the following information:

Delegator	Darren McGill
Delegate	Sajith Sageer
Reason	Holidays
Start Date	30-05-2024
End Date	05-06-2024
Status	In Progress

To the right of the 'Details' table, there are two input fields: 'Site Access' set to 'All Sites' and 'Teams' (which is currently empty).

With the dates provided Sajith can log into the system and will be given an option to choose who he wants to login as.

The screenshot shows the Trackplan FM login interface. At the top is the 'Trackplan FM' logo. Below the logo, a message states: 'You have active delegations. Please select a user to login as.' There are two login options presented as buttons with user icons:

- A button for 'Sajith Sageer'.
- A button for 'Sajith Sageer by delegation of Darren McGill'.

A new user is created behind the scenes (User = sajith@trackplanfm.com by delegation of Darren McGill).

User Audit Trail – History of user actions now visible in Settings area.

Why is it useful?

In the settings area you can now see a history of most user actions while using the system.

Details:

This can be found in Settings -- Audit Trail and is filterable by User and Event.

Audit Trail Events

logo!

0

+ New

darren@trackplanfm.com

🔔

Users

Audit Trail Event

<Users>

(Please Select)

Date Created	User	Event	Job Number	Site Name	Site Code	Location	SubLo...	Asset	Asset Num...	Planned Sched...	Stock Name	Form Name	Request No.	Event Text	Login Guid
31/05/2024 11:22	Darren McGill	Login													14220c30-e391-4d7c-b1c9-67ae4a501607
31/05/2024 09:24	Mark Cochrane	Login													7ecdb9043ffe-482e-cc43-e0d141c018c8
30/05/2024 22:44	Burhan M	Login													326d0f6b-c267-492f-ba9d-c4842f2fab4d
30/05/2024 15:58	Darren McGill	Create Job	2044	Campus 25	c25										
30/05/2024 15:58	Darren McGill	Create Job	2044	Campus 25	c25										
30/05/2024 15:58	Darren McGill	Upload Sheet Processing Complete												Planned Items-Planned Items Template (12)_30-05-2024_14.58.0...	8a518387-40ee-41e4-8e7e-d5603e825b31

Job Calendar and quotes grids – new filter added for Projects.

Why is it useful?

A simple new addition to the filters on both screens. This will help when a user wants to find jobs or quotes associated to a specific project.

Details:

Calendar View.

Calendar View Screenshot:

Filters: Reactive / Planned, Open / Closed, Status, Sub Status, Priority, Job Type, Job Sub Types, Client Contract, Site, Team, Project (highlighted with a red box and arrow).

Calendar Grid:

DAY	WEEK	MONTH	TIMELINE	AGENDA WEEK	AGENDA DAY
Mon 27/05	Tue 28/05	Wed 29/05	Thurs 30/05	Fri 31/05	
09:00					
10:00					
11:00					
12:00					
13:00					
14:00					
15:00					
16:00					

Job Quotes / Estimates view.

Job Quotes / Estimates View Screenshot:

Filters: Quote Status, Resource, Client Contract, Site, Quote No., Reactive / Planned, Location, Sub Location, Regions, Site Type, Project (highlighted with a red box and arrow), Assigned User.

No.	Description	Ref.	Site	Resource	Status	Requested For	Submitted Date	Submitted By	Value	Job No.	Job Status
1745-001	test	5555	000 MARK www - Normal site Limerick	Gabriel Contractor	Submitted	13/03/2024 15:39	13/03/2024 15:47	darren@trackplanm.com	1,300.00	1745 1745-001	Instructed Quote Submitted
1684-002	esd	esd	Berlin 12345 - Building North	larla@triflesResource	Approved	22/02/2024 16:52	22/02/2024 16:53	larla@trifles	5,000.00	1684 1684-001	Pending Quote Approved
1577-001	first quote	quote 1	000 MARK www - Normal site Limerick	MarkR	Submitted	07/02/2024 11:09	01/03/2024 08:39	mark@trackplanm.com	1,332.00	1577 1577-001	More Work Required Quote Submitted
1633-002	stuf	sefef	Munich 7787 - Normal site North	sa@thcontractor@contractor	Pending	29/01/2024 09:24			0.00	1633 1633-001	Instructed

Job Tasks Report – new columns: job number, statuses, sub type, region, contract

Why is it useful?

New columns on the job task report for more meaningful reporting.

Details:

Job Tasks Showing job information example.

Job Tasks Showing Job Information

Open / Closed

<Open / Closed>

Reactive / Planned

<Reactive / Planned>

Client Contract

<Client Contracts>

Site Type

<Site Types>

Site

Teams

<Teams>

Job Priority

Resource Types

<Resource Type>

Resource

<Resource>

Job Type

<Job Type>

Job Sub Type

<Job Sub Types>

Performance

<Job Performance>

Job Status

<Job Status>

Sub Status

<Job Sub-Status>

Location

<Locations>

SubLocation

<Sub Locations>

Region

Financial Stage

<Financial Stage>

Revenue Jobs

<Revenue Jobs>

Sales Margin

All

Job Category

<All Job Categories>

Project

<Projects>

Quote Status

<All Statuses>

Cost Stage

Sales Stage

Created Date

<Created Date>

Instructed Date

Last 30 Days

Completed Date

<Completed Date>

Last Modified Date

<Modified Date>

Due Date

<Due Date>

1

2

100%

Find | Next

Job Tasks Showing Job Information - Job Tasks - all instructed jobs from last 30 days.

Job Number	Job Task Number	Task Status	Job Status	Site Name	Location	SubLocation	Site Type	Region	Client Contract	Created Date	Date Instructed	Expected Start	Resource	Resource Job Number	Job Description	Job Type	Job Sub Type	Job Category
1874	1874-001	Instructed	Instructed	Berlin			Building	Germany	Client 1	07-05-2024 14:07	07-05-2024 14:07	07-05-2024 14:07	saythcontractor@contractor.com		Auto Approve Form Test			
1879	1879-001	Completed	Complete	Office No 9			Offices	Northern	Client 1	01-05-2024 10:48	01-05-2024 10:48	01-05-2024 12:48	Kevin Contractor Dev		Kevin AOT & FTF Testing From App	Electrical		
1883	1883-001	Completed	Complete	iarlaith test 1			Building	Limerick	iarlaith test 1	01-05-2024 11:33	01-05-2024 11:33	01-05-2024 13:31	Kevin Contractor Dev		One Last Test	Aa test type		
1884	1884-001	Instructed	Instructed	Building No 2			Normal site	Generic Region	Client 2	03-05-2024 11:33	03-05-2024 11:33	03-05-2024 13:33	saythcontractor@contractor.com		Category and Project Job	Fire		Job Cat 12
1885	1885-001	Instructed	Instructed	Madrid			Building	Limerick		07-05-2024 10:00	07-05-2024 10:00	07-05-2024 10:00	saythcontractor@contractor.com		Job with Project 1			
1887	1887-001	Instructed	Instructed	Madrid			Building	Limerick		07-05-2024 12:05	07-05-2024 12:05	07-05-2024 14:05	saythcontractor@contractor.com		Category Project 1			Sales

Job Cost Report – Finance codes and resource codes added.

Why is it useful?

Driven by multiple clients who export cost data into excel files on a daily, weekly and monthly basis. These new columns will help with data analysis and integrations into their own finance systems.

Details:

Finance codes can be set up in Finance – Finance codes. Now they will then show on the Job Costs Report - All Columns Report.

They will also be available as hidden fields on the main cost list in Finance – Job Costs.

The resource code can be set on the resource details screen and will help with mapping with your finance system.

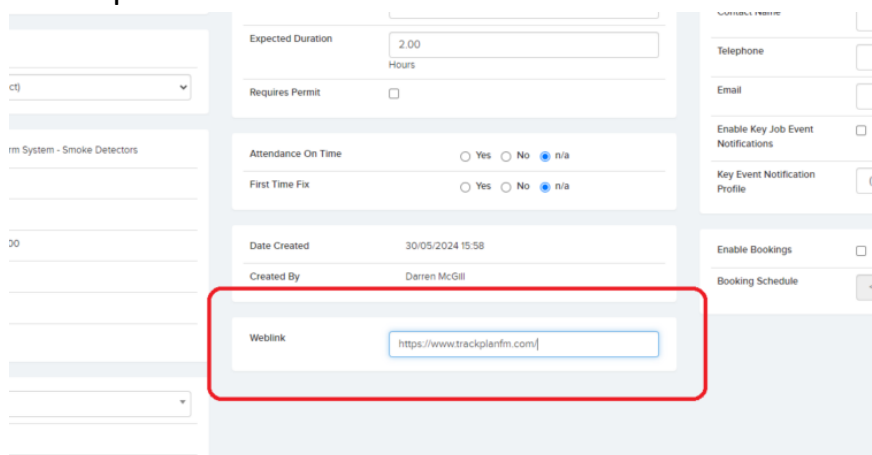
Job Page – can add a custom weblink for a job by editing job or using Message Box

Why is it useful?

A useful feature driving by a number of clients who wanted a clickable link available to them on the Job details screen.

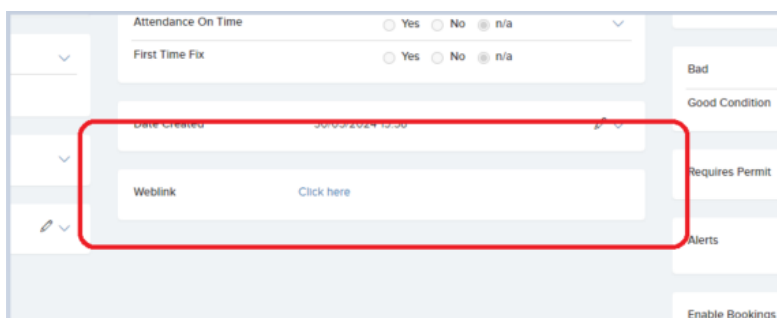
Details:

Edit the Job details to input the link.



The screenshot shows a form for editing job details. The 'Weblink' field is highlighted with a red box and contains the text 'https://www.trackplanfm.com/'. Other visible fields include 'Expected Duration' (2.00 Hours), 'Requires Permit' (checkbox), 'Attendance On Time' (radio buttons: Yes, No, n/a), 'First Time Fix' (radio buttons: Yes, No, n/a), 'Date Created' (30/05/2024 15:58), 'Created By' (Derren McGill), 'Telephone', 'Email', 'Enable Key Job Event Notifications' (checkbox), 'Key Event Notification Profile' (dropdown), 'Enable Bookings' (checkbox), and 'Booking Schedule' (dropdown).

Clickable link will show when saved.



The screenshot shows the same job details form after saving. The 'Weblink' field is highlighted with a red box and now displays a clickable link 'Click here' in blue text. Other visible fields include 'Attendance On Time' (radio buttons: Yes, No, n/a), 'First Time Fix' (radio buttons: Yes, No, n/a), 'Date Created' (30/05/2024 15:58), 'Bad', 'Good Condition', 'Requires Permit', 'Alerts', and 'Enable Bookings'.

Job Page – The collapsible panels remember the state for the last time used.

Why is it useful?

It will remember how you last viewed the job page so you do not need to expand the same panel each time. We have also implemented this on other pages we have redesigned in this release.

Details:

When a user expands or collapses a panel the system will remember the last state of each panel so the next time they come back into that screen the panel will be visible.

SMS Messages sent to the resource – This now supports all characters. SMS shortened with weblink.

Why is it useful?

All characters will now be sent correctly on the SMS message sent to the resource when instructing the resource.

Also, the SMS message sent to the Resource has been shortened. We still show the most important job information on the SMS message at the top. But have also added a weblink on the SMS so the Resource can click to access the job via the portal and see all the details of the job task.

Most clients are using the default Trackplan account to send SMS messages.

If any client would like to revert to the old version where the full job details are included on the SMS, then they will need to set up their own SMS account with either ESendex or WorldText.

Please contact support@trackplanfm for more information on how to do this.

Details:

New shortened SMS Template with link.

The screenshot displays the 'SMS Settings' interface. At the top, there's a header 'SMS Settings'. Below it, the 'SMS Provider Settings' section is visible, featuring a table with one row: 'SMS Provider' set to 'Default Trackplan SMS Provider'. To the right of this table are two buttons: 'Edit' (orange) and 'Back to Settings Menu' (grey). Below the provider settings is the 'SMS Template' section, which contains a text area with the following template text: 'From: [ClientName]', 'New Job Task [TaskNumber]', 'To: [Contractor]', 'Site: [SiteName]', and 'Weblink: [LinkToTaskOnly]'.

Reports – new report added for Contractor Quotes.

Reports - new Cost and Sales Stage filters. Previous 12 months added to date filters.

Reports - SFTP – filename and authentication by private key.

Why is it useful?

Always useful to have new reports added to our library of reports and also some new useful filters and improvements added.

Details:

New Contractor Job Quotes report - Shows all Contractor Job Quotes.

Contractor Job Quotes

Open / Closed

Reactive / Planned

Client Contract

Site Type

Site

Teams

Job Priority

Resource Types

Resource

Job Type

Job Sub Type

Performance

Job Status

Sub Status

Location

Sub Location

Region

Financial Stage

Revenue Jobs

Sales Margin

Job Category

Project

Quote Status

Cost Stage

Sales Stage

Created Date

Instructed Date

Completed Date

Last Modified Date

Due Date

Contractor Job Quotes - All Contractor Job Quotes

Job Information														
No.	Description	Ref.	Resource	Status	Quote Date Created	Requested For	Submitted Date	Submitted By	Value	Job No.	Job Status	Date Created	Job Task Number	Task Status
1746-001	test	5555	Gabriel Contractor	Submitted	13-03-2024 15:39	13-03-2024 15:39	13-03-2024 15:47	darren@blackplanm.com	1300.00	1746	Instructed	12-03-2024 10:17	1746-001	Quote Submitted
1684-002	asd	asd	lariathTestResource	Approved	22-02-2024 16:52	22-02-2024 16:52	22-02-2024 16:53	lariathTest	5000.00	1684	Pending	20-02-2024 10:20		
1577-001	first quote	quote 1	MarkR	Submitted	07-02-2024 11:09	07-02-2024 11:09	01-03-2024 09:55	mark@blackplanm.com	1332.00	1577	More Work Required	11-01-2024 18:01	1577-001	Quote Submitted
1633-002	sfsf	sfsfsf	sajthcontractor@contactor.com	Pending	29-01-2024 09:34	29-01-2024 09:34			0.00	1633	Instructed	22-01-2024 10:27	1633-001	Instructed
1633-001	sfsf	sfsfsf	sajthcontractor@contactor.com	Pending	29-01-2024 09:34	29-01-2024 09:34			592.50	1633	Instructed	22-01-2024 10:27	1633-001	Instructed
1611-001	aaaa	aaaaaaa	marktest111	Pending	15-01-2024 17:12	15-01-2024 17:12			0.00	1611	Contractor Confirmed Complete	15-01-2024 16:33		
1496-001	Test quote	Test	sajthcontractor@contactor.com	Rejected	15-12-2023 16:45	15-12-2023 16:44			0.00	1496	Pending	15-12-2023 16:43	1496-001	Cancelled
1492-001	sfsfsf	sfsfsf	sajthcontractor@contactor.com	Pending	15-12-2023 16:40	15-12-2023 16:41			0.00	1492	Instructed	15-12-2023 14:10		

Cost and Sales Stage filters added. Every job is assigned a cost stage and sales stage by the system during its life. These show the current state of the job as either

- WIP - work in progress – for jobs which are yet to be completed.
- Accrual – for jobs that have been completed but are yet to be invoiced.
- Invoiced – for completed jobs which have been invoiced by the contractor (or a sales invoice sent to the client).

Previous 12 months option added to the date filters.

Contractor Job Quotes

Open / Closed

Reactive / Planned

Client Contract

Site Type

Site

Teams

Job Priority

Resource Types

Resource

Job Type

Job Sub Type

Performance

Job Status

Sub Status

Location

Sub Location

Region

Financial Stage

Revenue Jobs

Sales Margin

Job Category

Project

Quote Status

Cost Stage

Sales Stage

Created Date

Instructed Date

Completed Date

Last Modified Date

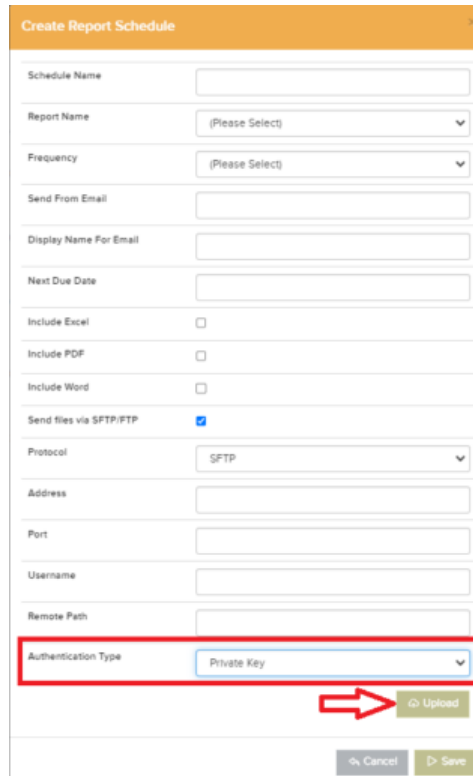
Due Date

Contractor Job Quotes - All Contractor Job Quotes

Job Information														
No.	Description	Ref.	Resource	Status	Quote Date Created	Requested For	Submitted Date	Submitted By	Value	Job No.	Job Status	Date Created	Job Task Number	Task Status
1746-001	test	5555	Gabriel Contractor	Submitted	13-03-2024 15:39	13-03-2024 15:39	13-03-2024 15:47	darren@blackplanm.com	1300.00	1746	Instructed	12-03-2024 10:17	1746-001	Quote Submitted

SFTP – We recently added the ability for clients to schedule reports to be sent by FTP. The SFTP methods has been improved in this release.

- Filename sent by FTP made unique with the report schedule name + the date and time
- authentication by private key added as a protocol.



The screenshot shows a web form titled "Create Report Schedule". The form contains several input fields and checkboxes. The "Authentication Type" dropdown menu is highlighted with a red rectangle, and a red arrow points from it to the "Upload" button. The "Send files via SFTP/FTP" checkbox is checked, and the "Protocol" dropdown is set to "SFTP".

Create Report Schedule	
Schedule Name	<input type="text"/>
Report Name	(Please Select) ▼
Frequency	(Please Select) ▼
Send From Email	<input type="text"/>
Display Name For Email	<input type="text"/>
Next Due Date	<input type="text"/>
Include Excel	<input type="checkbox"/>
Include PDF	<input type="checkbox"/>
Include Word	<input type="checkbox"/>
Send files via SFTP/FTP	<input checked="" type="checkbox"/>
Protocol	SFTP ▼
Address	<input type="text"/>
Port	<input type="text"/>
Username	<input type="text"/>
Remote Path	<input type="text"/>
Authentication Type	Private Key ▼
<input type="button" value="Upload"/>	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

QR codes – Printing QR codes. Grid filters now work.


Why is it useful?


A fix made to help users choose exactly what QR codes they would like to select for printing when using the column filters within the grid itself.

Details:

Filter example.


QR Codes



20

[+ New](#)

mark@trackplanfm.com



QR Codes List

Scanned QR Report

Clear

Client Contract

Asset Class

Asset Sub Class

Site

Regions

Site Type

QR Type

<Client Contracts>

<Asset Class>

<Asset Sub Class>

<All Sites>

<All Regions>

<All Site Types>

Site

QR Code

QR Type

Asset


Asset Code

Site

Site Code

Location

Location Code




-NAi0VBggg6q1rZ7BBDT

Site

Building No 1

BNO1




-NAi0a7VFGpIPGfk-2A3

Site

Building No 2

BN2



-NAxJGho1abXVb-1Fqrv

Site

Main Office Build...

MOB01

Show items with value that:

Contains

[FILTER](#)

[CLEAR](#)

Message Box - New tags for job description and teams.

Message Box - New action rule for Approve Contractor Quote.

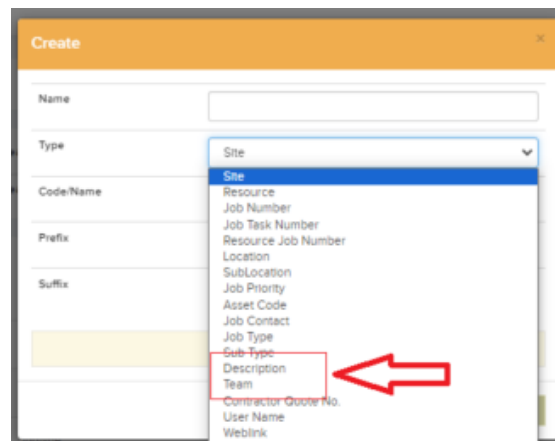
Why is it useful?

Useful new tags for clients using the new Message Box module.

Details:

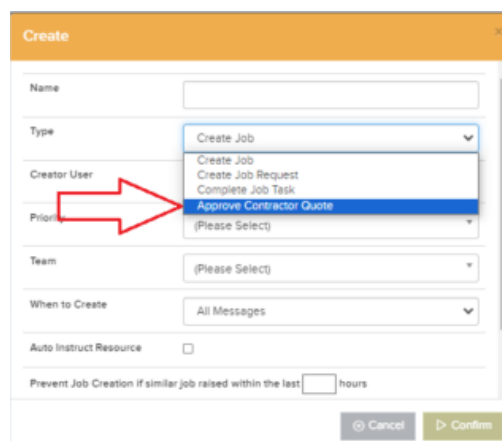
Job description and Team can now be brought in from an email received in the message box, and then associated to the incoming message and its associated job (if there is one). Set this up as an association rule.

There is also a new Action rule, so an incoming email can trigger the approval of a contractor quote. For advanced users only!



The screenshot shows a 'Create' dialog box with a 'Type' dropdown menu. The dropdown is open, showing a list of options: Site, Resource, Job Number, Job Task Number, Resource Job Number, Location, SubLocation, Job Priority, Asset Code, Job Contact, Job Type, Sub-Type, Description, Team, Contractor Quote No., User Name, and Weblink. A red box highlights the 'Description' and 'Team' options, and a red arrow points to them.

New Approve Contractor Quote Action Rule added.



The screenshot shows a 'Create' dialog box with a 'Type' dropdown menu. The dropdown is open, showing a list of options: Create Job, Create Job Request, Complete Job Task, Approve Contractor Quote, and (Please Select). A red box highlights the 'Approve Contractor Quote' option, and a red arrow points to it. The dialog box also includes fields for Name, Creator User, Priority, Team, When to Create, Auto Instruct Resource, and Prevent Job Creation if similar job raised within the last [] hours. At the bottom, there are 'Cancel' and 'Confirm' buttons.

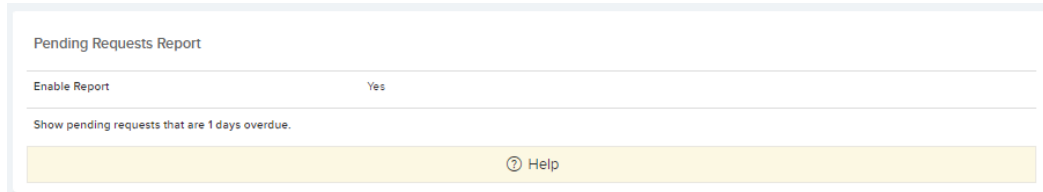
Pending Job Requests Report – Can choose from name and email address.

Why is it useful?

For any report getting sent, it is useful to have a dedicated FROM email address set. The Pending Requests Report in Settings – Job Requests will now take the Fixed name & email address in Settings -> Email Settings.

Details:

Request Report in Settings – Job Requests.



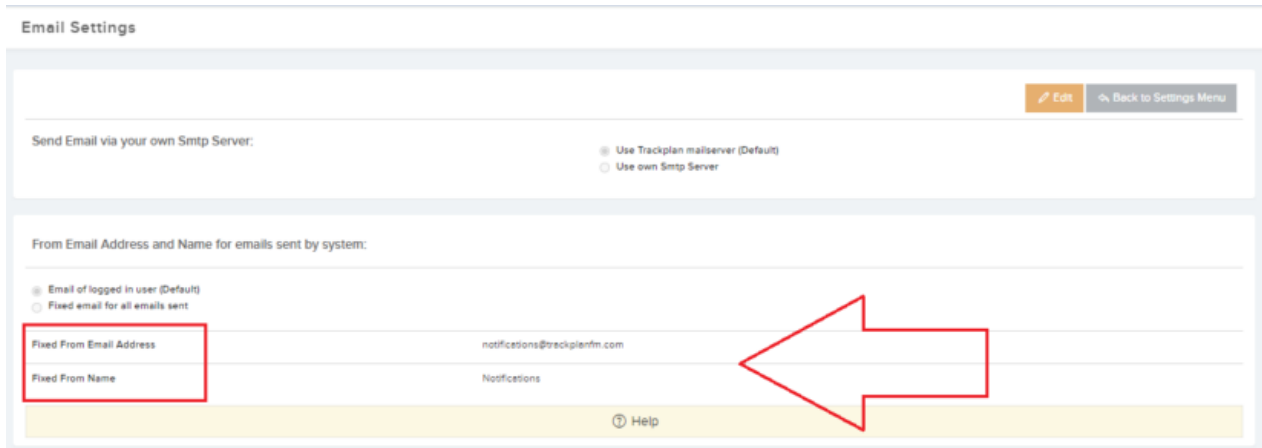
Pending Requests Report

Enable Report	Yes
---------------	-----

Show pending requests that are 1 days overdue.

[Help](#)

Email settings in Settings – Email Settings.



Email Settings

[Edit](#) [Back to Settings Menu](#)

Send Email via your own Smtip Server:

☒ Use Trackplan mailserver (Default)
☐ Use own Smtip Server

From Email Address and Name for emails sent by system:

☒ Email of logged in user (Default)
☐ Fixed email for all emails sent

Fixed From Email Address	notifications@trackplanfm.com
Fixed From Name	Notifications

[Help](#)

A red box highlights the 'Fixed From Email Address' and 'Fixed From Name' fields. A large red arrow points from these fields towards the 'Pending Requests Report' settings shown in the previous block.

Authorisation Bands for Purchase Orders, Quotes and Projects – Improvements

Why is it useful?

A quick fix here for an existing feature to make sure there are no gaps between the authorisation bands set up.

Details:

Behind the scenes fixes and improvements.

Sales Quotes – Can easily add Job Contact when sending sales quotes by email.

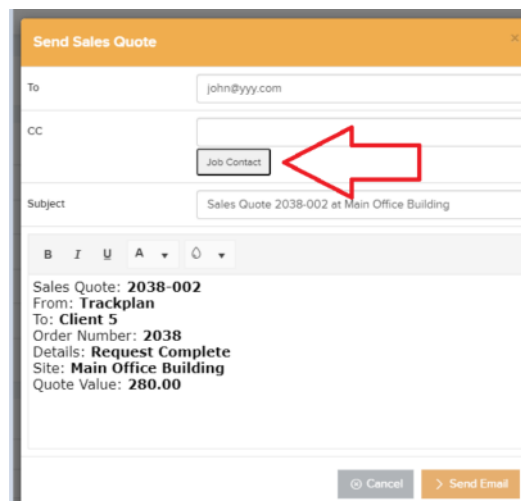
Sales Quotes – Can now added item from price catalogue when creating new quote.

Why is it useful?

Two good features to help users send sales quotes to the correct person and easily add the correct items, already priced from the price catalogue module.

Details:

Easily add Job Contact when sending sales quotes by email if there is a job contact on the job.



The screenshot shows a 'Send Sales Quote' window. It has fields for 'To' (john@yyyy.com), 'CC' (with a 'Job Contact' button highlighted by a red arrow), and 'Subject' (Sales Quote 2038-002 et Main Office Building). Below these is a rich text editor containing the following text: Sales Quote: 2038-002, From: Trackplan, To: Client 5, Order Number: 2038, Details: Request Complete, Site: Main Office Building, Quote Value: 280.00. At the bottom are 'Cancel' and 'Send Email' buttons.

Ability to add an item from the Price Catalogue when create a New Sales quote. (Before you could only add an item when the sales quote was created)

New Sales Quote

Sales Quote Reference

Description

Sales Quote Status: Pending

Date Created: 31/05/2024 11:37

Date Sent

Date Approved

Date Rejected

Currency: GBP

Sales Labour Value: 0

Sales Materials Value: 0

Sales Other Value: 0

Sales Total Value

Add from Catalogue

Planned Schedules – Can now select job sub-type as well as job type.

Planned Schedule Weekend setting – Can now include Friday, Saturday, or Sunday.

Why is it useful?

Two useful additions to the Planned Maintenance module. Ability to add a Job Sub Type for reporting and also the ability to configure your weekends.

Details:

Sub Type added.

Weekend configuration.

By default, this will take what you can configured in Settings – General Settings

Schedule Type: Regular

Job Creation Behaviour: Only create job after current open job is completed

The next job can only be created once the current open job is completed and the next due date becomes due. For "Sliding" schedules the next due date will be set one period on from when the current job is completed.

Create Next Job Immediately: ☒

Ignore Weekends: ☒

Weekend Days: Saturday / Sunday

App – Can ask for project and job category on new job screen.

App – Edit asset can Scan QR code quickly to associate to new QR code.

App - Documents now display according to the public / private setting.

App – Free text search now available when finding a resource.

App – Request app – Can make photos mandatory on new request.

App – Request app – Can ask for priority or expected dates.

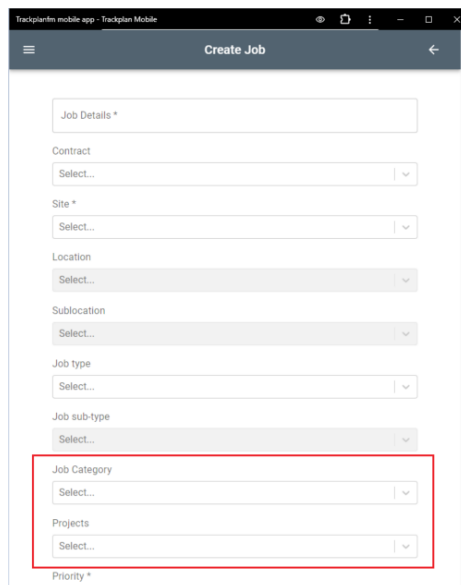
Why is it useful?

All these new features will enhance user experience on all modules of our mobile app.

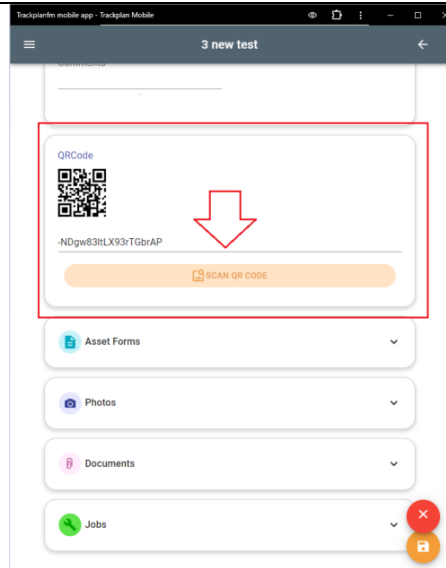
Details:

Project & category dropdown available when creating a new job on the manager module.

Customisable in Settings – App Manager – Settings.

A screenshot of the 'Create Job' form in the Trackplan mobile app. The form is displayed on a mobile device screen. It features a header bar with a hamburger menu icon, the title 'Create Job', and a back arrow. Below the header, there is a 'Job Details *' section. The form contains several dropdown menus: 'Contract', 'Site *', 'Location', 'Sublocation', 'Job type', 'Job sub-type', 'Job Category', 'Projects', and 'Priority *'. The 'Job Category' and 'Projects' dropdowns are highlighted with a red rectangular box. The 'Job Category' dropdown is currently set to 'Select...' and the 'Projects' dropdown is also set to 'Select...'.

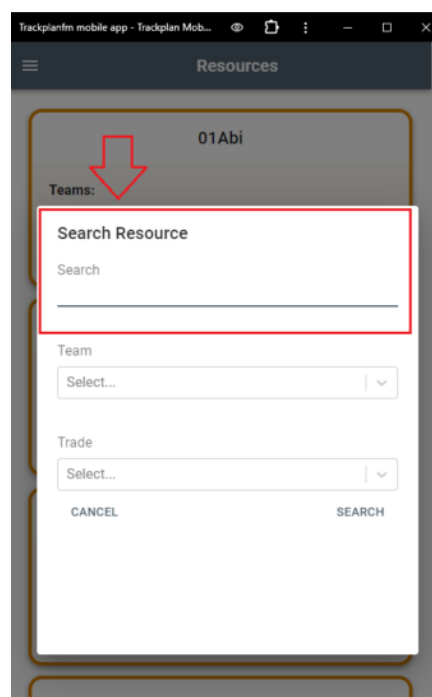
Scan QR code quickly to associate to new QR code in the Manager & Resource App modules.



Public/Private document settings now considered on all App modules.

File Name	Description	File Type	Asset	Job Number	Created	Expiry Date	Created By	Status	Attach To New Job	Tags
photo-169470956430.jpeg	App	Image	25th October TEST...		14/09/2023 07:12	Add	Abhishek Trackplan	Private Change	No Change	
photo-1694582199895.jpeg	App	Image	25th October TEST...		14/09/2023 10:12	Add	Abhishek Trackplan	Public Change	No Change	
photo-1692232665639.jpeg	App	Image	25th October TEST...		18/08/2023 07:58	Add	Abhishek Trackplan	Public Change	No Change	

Find a Resource easily with Free text.



Can now make photos mandatory when a user is creating a new request. Can also ask for either Job priority or expected dates.

Customisable in Settings – App Manager – Settings.

Requestor Module

Expected Date Or Job Priority

Ask For Job Priority

Require Photo on New Request



 Help