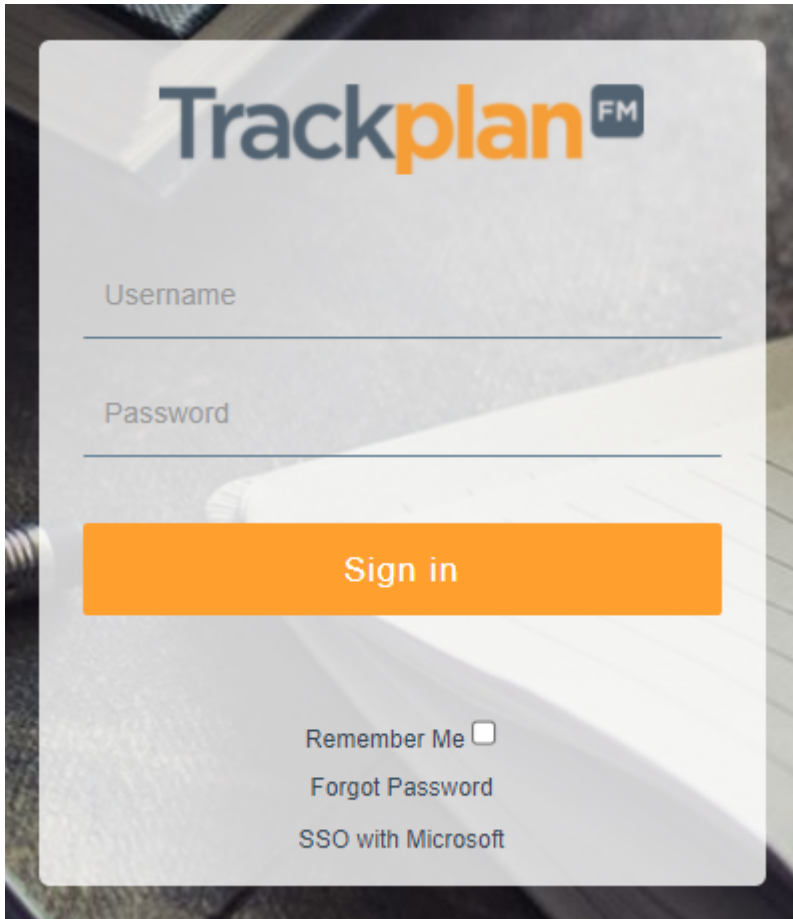
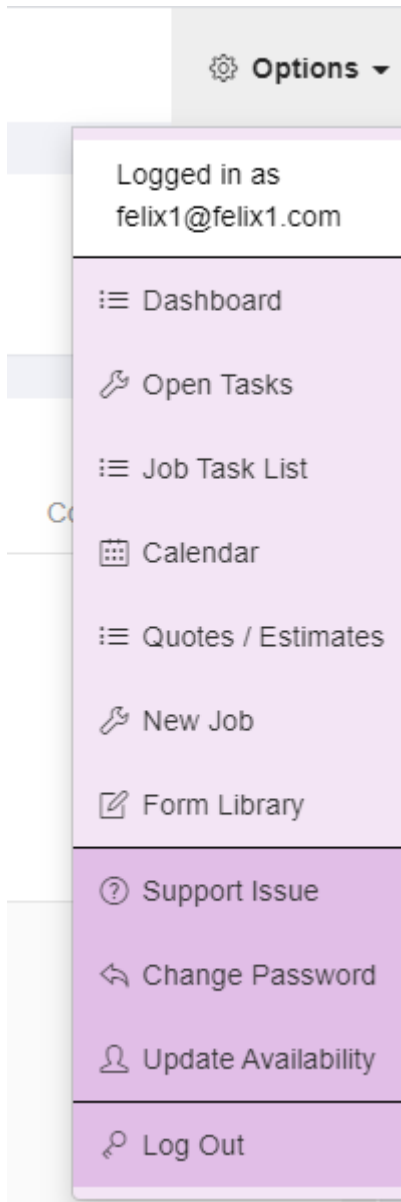


Contractor Portal Overview

Sign in to the Contractors Portal via the Main Application sign in page.

The image shows a login form for Trackplan FM. The form is white with rounded corners and is overlaid on a background image of a construction site. At the top of the form is the Trackplan FM logo, with 'Trackplan' in blue and 'FM' in a blue square. Below the logo are two input fields: 'Username' and 'Password', each with a blue underline. Below these fields is a large orange button with the text 'Sign in' in white. At the bottom of the form, there are three links: 'Remember Me' with an unchecked checkbox, 'Forgot Password', and 'SSO with Microsoft'.

Once Logged in the **Options** dropdown in the top right of the page will provide you with all the information available to you.



1. Dashboard – A Dashboard view showing number of Reactive & Planned open and overdue Jobs, Reactive & Planned Quotes pending and SLA information
2. Open Tasks – A mobile friendly view of all tasks
3. Job Task List – A desktop view of all tasks. These can be filtered using the 5 filters at the top of the screen.
4. Calendar – A calendar view that shows all tasks per day, week, work week and month.
5. Quotes / Estimates – A list of all quotes and estimates
6. New Job – The new Issue Pop-up which allows the Contractor create a new task.

7. Form Library – Forms can be stored here for use by the contractor.

Job Task List

The *Job Task List* is where you will find your next Task

Click on **Details** to access the details page of that task.

Reactive / Planned	Open / Closed	Performance	Job Task Status	Job Number
<Reactive/Planned>	<Open/Closed>	<Performance>	<Task Status>	Job Number

Job Number	Description	Site	Location	Region	Task Status	Job Status	Expected Start	Expected Complete	Instructed	Completed
722-001	Contractor Job	Delta Campus a5 - School	Accounting Room 1	Brooklyn	Instructed	Instructed	06/09/2021 17:35	06/09/2021 19:35	06/09/2021 16:35	

The Main **Job Task Details** page will have all the details about that task.

722-001	Delta Campus	Instructed	Contractor Job
Job Task No.	Site	Status	Details
Task Detail	Documents	Assets	Costs
	Quotes / Estimates	Forms	Time Records
	Back		

The Tabs along the top help to navigate to all information:


Documents: The Contractor can upload photos or documents here.

Filter By Tags	Upload
Filter By Tags	

File Name	Description	File Type	Created	Created By	Status	Tags
No Documents Uploaded For This JobTask						

0	10	items per page	No items to display
---	----	----------------	---------------------


Assets: A list of Assets assigned to that task.



 Assets Assigned To This Job: 722-001

Contract Details										
Description	Class	Location	Asset Number	Serial Number	Installed	Warranty	Resource	R...	End Date	
No assets assigned to this job										

10 items per page No items to display


Costs: The Contractor can add, edit or view cost here.

Job Costs  Add Cost

Invoice #	Description	Cost Status	Budget / Contract	Created	Costs (Ex. Tax)				
					Materials	Labour	Call-Out	Net Total	
		Pending		06/09/2021 16:35	0.00	0.00	0.00	0.00	 
					0.00	0.00	0.00	0.00	

10 items per page 1 - 1 of 1 items


Clicking on **Add Cost**, **View** or **Edit** will bring up a pop-up where the contractor can add, view or edit the costs. Click **Save** when ready and the costs will be saved and show on the Job Costs list.

Edit Cost Save as Invoiced  Save Close

Job No. 722 Task No. 722-001 Description

Contractor Felix1

Invoice #

Invoice Date 

Cost Breakdown

Materials 0.00

Labour 0.00

Call-Out 0.00

Net Total 0.00

Created 06/09/2021 16:35

Created By

Cost Status Pending

Quotes/Estimates: A list of Quotes/Estimates for that task.

Contractor Quotes

[+ New Contractor Quote](#)

Quote No.	Description	Ref.	Status	Requested For	Submitted Date	Submitted By	Value
No quotes / estimates for this job yet							

0

10 items per page

No items to display

Forms: The Contractor can view forms that were sent down with the task or upload a new form. These form results can also be exported to excel.

Form Results

Excel

Add Form

Form Name	Asset	Location	Req'd	Created	Fails	Form Status	Submitted
No forms							

0

10

items per page

No items to display

Time Records: A List of all hours booked in relation to that task.

Time Records										
			Dates			Hours				
Resource	▼	Job Status	▼	Visit Status	▼	Arrived	▼	Left Task	▼	On Site
					No Booked Hours					
										0.00
◀ 0 ▶ 10 items per page										No items to display

The Body of the **Details** page displays all information about the task, including Description, Important dates, Location and contact information, and a map.

The contractor can take a photo from the here and view and add notes as per screenshot below.

Complete Task

Request Uplift

88

No.	722-001
Description	Contractor Job
Status	Start Task
Resource	Felix1

Expected Start	06/09/2021 17:35
Expected Complete	06/09/2021 19:35
Exp. Duration	2.00
Instructed	06/09/2021 16:35
Accepted	07/09/2021 09:26
Start Task	07/09/2021 09:26
Left Task	

Site Name	Delta Campus
Contract Name	
Location	Accounting Room 1
Contact Name	Sergio
Telephone	456216
Email	sergio@trial.com

21°46'39.8"N 72°12'40.1"W

102 Leeward Hwy, Venetian Road Settlement TKCA 1ZZ, Turks & Caicos Islands

View larger map

Business Solutions

Pizza Pizza

Kokomo Botanical Resort - Caribbean...

Graceway Sports Centre

Leeward Hwy

Leeward Hwy

Leeward Hwy

ACCU Diagnostics

Keyboard shortcuts

Map data ©2021

Terms of Use

Task Notes

<Note Types>

Excel

Add Note

Note	By	Date	Type
Resource Felix1 starts task for task 722-001	Felix1	07/09/2021 09:26	
Resource Felix1 accepts task 722-001	Felix1	07/09/2021 09:26	
Resource Felix1 instructed on task: 722-001. Expected Date set to 06 09 2021 17:35	Felix1	06/09/2021 16:35	

10

items per page

1 - 3 of 3 items

If certain settings are enabled in the main application the contractor can decline or reschedule the task.

215-001


Job Task Number


Main Office Building


Site


Instructed


Status


 Task Details


 Documents


 Assets


 Costs

 Quotes / Estimate

 Accept

 Decline

 Reschedule



Task No.	215-001
Description	Plumbing Issue
Status	Instructed
Resource	John McGill

Main Office Building

Instructed

Job Task Number

Site

Status

 Task Details

Documents

Assets

Costs

Quotes / Estin

☑ Accept

Reschedule

Task No.

215-001

Description

Plumbing Issue

Status

Instructed

Resource

John McGill

They can choose a time and date that suits them to arrive on site. This new start date can automatically approve or be sent back to the main application needing approval.

Reschedule Task

Requested Start Date

Name

Note

⌛ Cancel

▶ Confirm



A user in the main application can then approve or decline the new requested dates.

⌚ Requested Start Date/Time Needs Approval

The **Mobile View** has all the necessary information also.

Job Tasks

722-001



When:

06/09/2021 17:35 - 19:35

Details:

Contractor Job

Site:

Delta Campus
Accounting Room 1

Address:

1914 Lavendar Avenue New York NY
11223 United States
[Directions to Site](#)

Contact:

Sergio 456216

Status:

Start Task

Accept

Start

Leave Task

Depending on Settings the Contractor may need to:

1. Complete a Risk Assessment Form.
2. Accept Task
3. Start Task (Time records will be captured)
4. Complete Task by adding a note and signature. (Time records will be captured)
5. Cost Finalised – Once clicked Costs can no longer be edited by the Contractor.