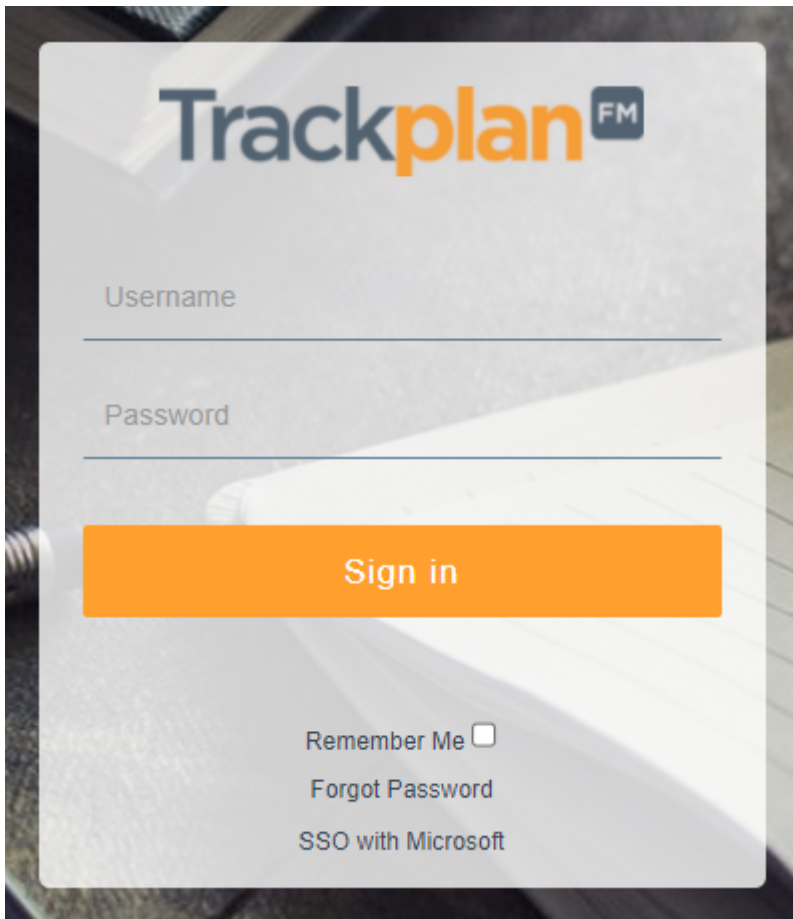


Contractor Portal Overview

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

A screenshot of the Trackplan FM sign-in page. The page features the Trackplan FM logo at the top. Below the logo are two input fields: 'Username' and 'Password'. A prominent orange 'Sign in' button is centered below the password field. At the bottom of the form, there are three options: 'Remember Me' with an unchecked checkbox, 'Forgot Password', and 'SSO with Microsoft'. The background of the page is a blurred image of a laptop keyboard.

Trackplan^{FM}

Username

Password

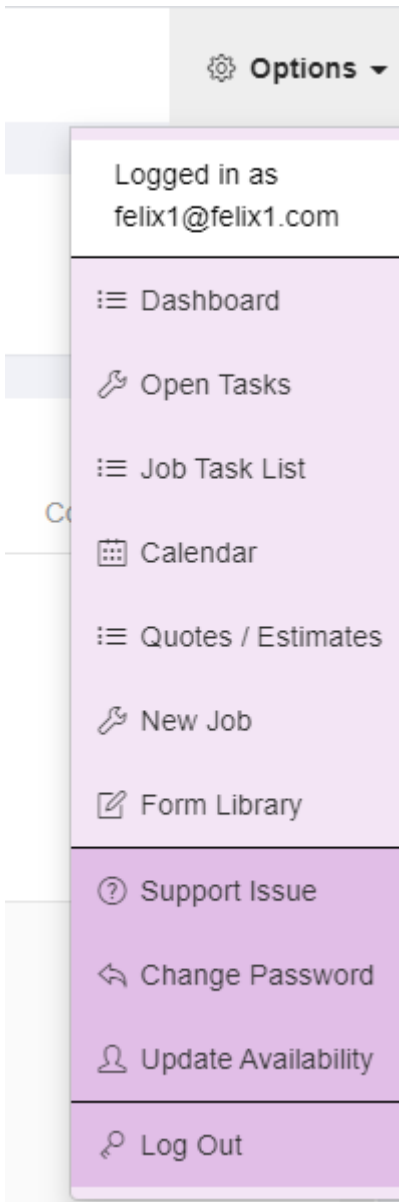
Sign in

Remember Me

[Forgot Password](#)

[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.

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

0 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	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

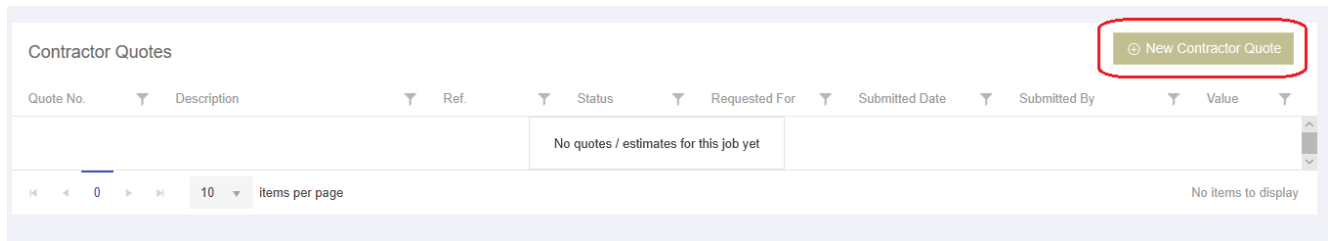
Net Total 0.00

Created 06/09/2021 16:35

Created By

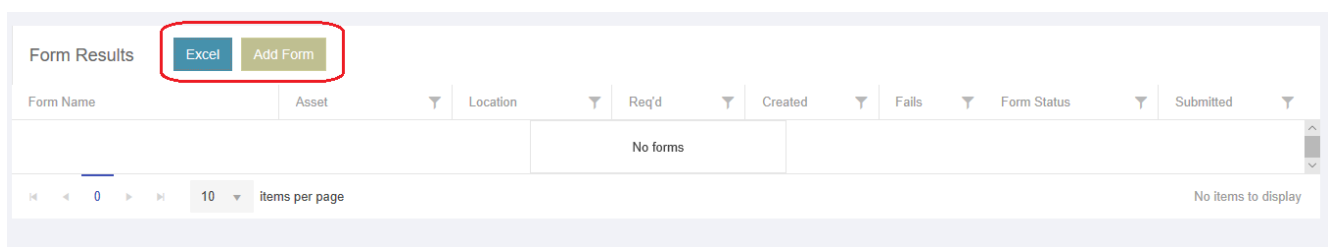
Cost Status Pending

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



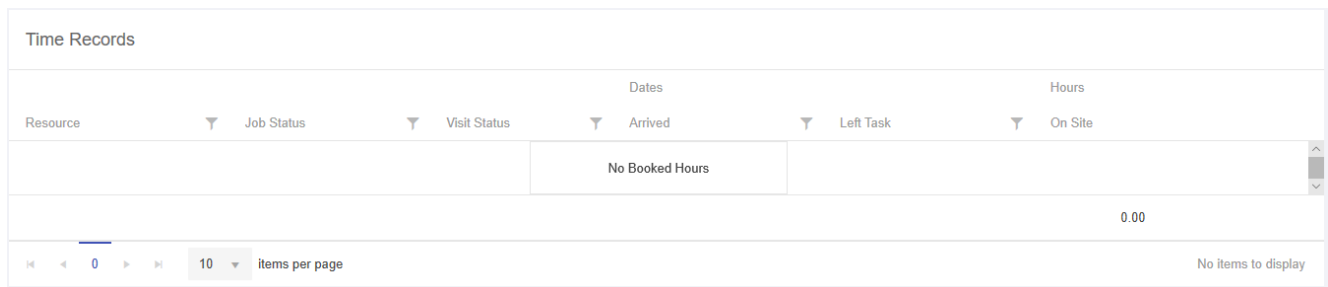
The screenshot shows a table titled "Contractor Quotes". The table has columns for Quote No., Description, Ref., Status, Requested For, Submitted Date, Submitted By, and Value. A red box highlights a button labeled "New Contractor Quote" in the top right corner. The table content is empty, displaying "No quotes / estimates for this job yet". At the bottom, there is a pagination control showing "10 items per page" and "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.



The screenshot shows a table titled "Form Results". The table has columns for Form Name, Asset, Location, Req'd, Created, Fails, Form Status, and Submitted. A red box highlights two buttons: "Excel" and "Add Form" in the top left corner. The table content is empty, displaying "No forms". At the bottom, there is a pagination control showing "10 items per page" and "No items to display".

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



The screenshot shows a table titled "Time Records". The table has columns for Resource, Job Status, Visit Status, Dates (Arrived, Left Task), and Hours (On Site). The table content is empty, displaying "No Booked Hours" and a total of "0.00" hours. At the bottom, there is a pagination control showing "10 items per page" and "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.

The screenshot displays a task management interface. On the left, there are buttons for 'Complete Task', 'Request Uplift', and a camera icon. Below these are fields for 'No.' (722-001), 'Description' (Contractor Job), 'Status' (Start Task), and 'Resource' (Felix1). A table below shows task schedule details: 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), and Left Task.

In the center, there is a form for task details: Site Name (Delta Campus), Contract Name, Location (Accounting Room 1), Contact Name (Sergio), Telephone (456216), and Email (sergio@trial.com).

On the right, there is a map showing the location with coordinates 21°46'39.8"N 72°12'40.1"W and address 102 Leeward Hwy, Venetian Road Settlement TRCA 1ZZ, Turks & Caicos Islands. Landmarks like ACCU Diagnostics and Graceway Sports Centre are visible.

At the bottom, there is a 'Task Notes' section with a table:

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	

Buttons for 'Excel' and 'Add Note' are also visible.

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

The screenshot shows a task details view for task 215-001. The task is titled 'Main Office Building' and has a status of 'Instructed'. Below the title are navigation options: Task Details, Documents, Assets, Costs, and Quotes / Estin.

At the top, there are three buttons: 'Accept' (green), 'Decline' (red), and 'Reschedule' (blue), along with a camera icon. Below these are fields for: Task No. (215-001), Description (Plumbing Issue), Status (Instructed), and 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.