

# Helpdesk Overview

Clients and end users can create “job requests” which the central team or helpdesk can then review and approve into full reactive jobs. These jobs can then be managed through a life-cycle from issuing the work to a contractor or internal engineer through to completion.

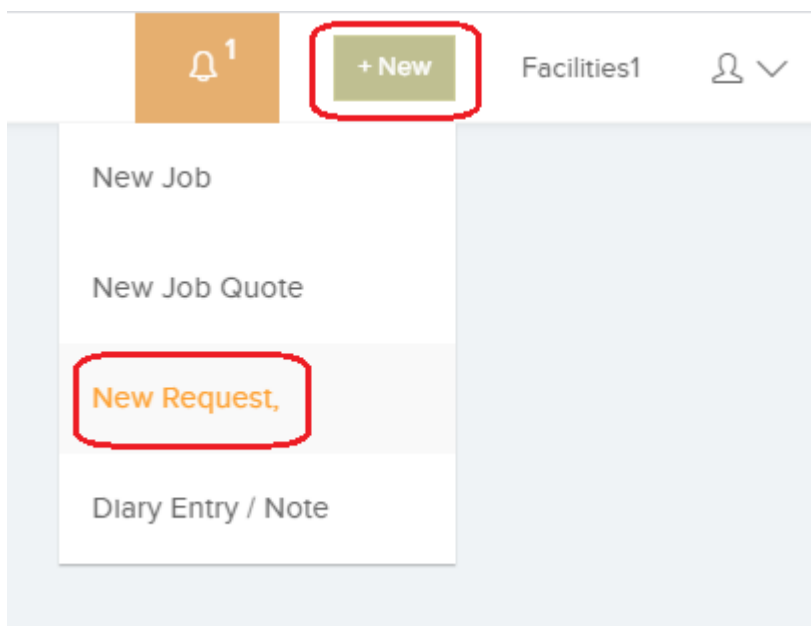
Email notifications can be sent to the client and helpdesk through the journey of the job request through to the completed job.

The highly configurable system gives you lots of options and flexibility.

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## Creating Job Requests

Requests can be created by logging to Trackplan’s web-based application, and selecting the **+NEW** button at the top-right of the page:



Requests can also be created by selecting the *New Request* button at the top-right of the *Requests* page:



This will bring you to the *Create a New Request* page:

**New Request,** ▶ Save

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Details

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Contract.

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Site Name

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Location.

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Sub Location

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Raised By

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Job Type

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Sub Type

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Expected Start By

You will be asked for the job details, site name, location, sub location, job type and expected date. As a new request is being created, a list of similar recently raised job requests will appear on the right-hand side on the same screen.

The new request screen can be configured to ask for information you want. For example, you can choose not to ask for the job priority or expected date:

## New Request Screen Settings

New request on one page or wizard	<input checked="" type="radio"/> Single Page <input type="radio"/> Wizard (multi-page)
Expected Date Or Job Priority	Ask For Expected Start Date
Ask For Job Type in New Request	Yes
Is Job Type Required	No
Ask For Single Asset	No
Is Location Required	No
Ask for Duration and # Resources Required	No
Can Request Quote	No

[? Help](#)

Job requests can also be created by sending in an email. The responsive design means that requests can be created by using a phone or tablet device with Trackplan. As soon as the request is created, then an email is sent to the client with confirmation of their new request and a new job request number. A similar email is sent to helpdesk users informing them of a new request.

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## Job Request Details

2649 Job Request No.	Castle View Site	Pending Status	Broken Window Details
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Details Documents Assets

Back Print Delete Decline Approve

Details Broken Window	
Site Reference	cc8
Site Name	Castle View
Location	- First Floor
Sub Location	- Lecture theatre
Job Type	- Incidents - H & S
Sub Type	
Raised By	Facilities1 Deren
Raised By - Email	markecochrane@gmail.com
Team	- Incident Team

Job Request Status	Pending
Date Raised	08/09/2021 09:51
Expected Start By	08/09/2021 15:00
Priority	Emergency

Job Request Notes

Note	By	Date/Time	Last Email Sent
No Job Notes			

10 items per page No items to display

Once the initial job request is created, you then have the option to add photos or documents to the job request. You can also associate the job request to one or more assets if they have been set up on the system.

Notes can be added to the job request, either at the time of creation, or later on. The user who created the request is able to follow the progress of the job requests by the helpdesk (for example: approval, completion etc.). They can also see all job requests previously made. They can be restricted to seeing only their own requests, or all job requests. You can even restrict by location

You can also ask specific customized questions dependent on the type of job request they are raising (e.g. parking permits or catering requests)

## Job Request No 2449 - Custom Fields

<b>2449</b> Job Request No.	<b>Ceredigion Hospital</b> Site
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Details   Documents   Assets   **Parking Permit**

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**Parking Permit**  
Enter your parking permit details here.

**Main**

Vehicle Registration

Vehicle Model

Colour of Vehicle

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### Helpdesk approval

Once the request is created, the helpdesk will receive notification of the job request by email. They can also tell from the job request list or the dashboards if there are any “pending” requests that need their approval:



Requests can also be assigned to “Teams”, which is determined by the job type. For example, the plumbing team or electrical team. Helpdesk users can then be restricted to only view requests for their team(s).

The helpdesk user can then go to the request details page and choose to Approve, Decline or Delete the request. The client will be updated in either case. The helpdesk can also send the job request for authorization by a manager before it can be approved:



Once the job request is approved, a new reactive job is created – it has the same job number as the job request. From the reactive job details page, the helpdesk user can then choose and instruct the work to a contractor or internal engineer. The job then goes through a series of steps before being completed.

The client / end user can receive email notifications on all key stages of this process. For example, once the request is approved, issued to a contractor, and of course completed. You can configure user by user what emails they receive, and you can also design the emails that get sent out including a client logo.

Further, the job request notes that they will be able to see will also keep them updated.

## Feedback by client / end user on work done

Once the job is completed, the client / end user can give feedback on the work done, and either confirm it is done or reject the work done. At this stage they can also add a note. If the work is rejected, then an email can be sent to the helpdesk. The helpdesk can then take appropriate action. For example, they can reopen the job.

The screenshot displays a job request management interface for job 2042. The top navigation bar includes the job number (2042), site name (Castle View), status (Approved), and details (lift not working). Below this, there are tabs for Details, Documents, and Assets. The main content area is divided into several sections:

- Details:** A section with a title "lift not working" and an edit icon.
- Site Information:** A table with fields for Site Reference (cc8), Site Name (Castle View), Location (- Ground Floor), and Sub Location (23 - Room 23).
- Job Type:** A table with fields for Job Type (- Lifts), Sub Type, and Raised By (Facilities1 Merk).
- Job Request Notes:** A table with columns for Note, By, Date/Time, and Last Email Sent. It contains two entries: "job done" and "Contractor fred4 confirms complete by completing task no 2042-001, completion date: 19/07/2019 14:47". Each entry has a "Send Email" button.
- Job Request Status:** A table with fields for Job Request Status (Approved), Date Raised (19/07/2019 14:21), Expected Start By (19/07/2019 17:21), Priority (Emergency), Approved by (Facilities1), and Date Approved (19/07/2019 14:25).
- Job Information:** A table with fields for Job Number (2042), Job Status (Resource Confirmed Complete), Assigned To (- Facilities Manager), Resource (- francois), and Expected Start By (19/07/2019 17:25).

Key interactive elements are highlighted with red boxes:

- A button bar at the top right containing "Back", "Add Note", "Confirm Work Done", and "Reject Work Done".
- An "Add Note" button in the Job Request Notes section.