Job Request Settings

The *Job Requests Settings* area allows you to control how the form for creating a Job Request looks and works. You can also decide whether you want to accept requests by email.

Select the *Edit* button at the top-right of the page to make changes.

The page is divided into sections based on the form section being modified.

New Request Screen Settings

The following settings are applied for New Request Screen Settings:

- **New Request on One Page or Wizard** — Choose to have new request form on one single page or over several screens in a wizard.
- **Expected Date or Job Priority** — When a user creates a request, choose whether to ask for date, priority or neither the date or priority. If neither is selected then the date and priority will also not appear on the request details page.
- **Ask for Job Type in New Request** — If this option is checked, then the user will be asked to select a job type (and sub type) in the first step of creating a new request.
- **Ask For Single Asset** — When creating a Job Request, Users can select an asset.
- **Is Job Type Required** — If this option is checked then the Job Type will be required when creating a new request.

- **Is Location Required –** if this option is checked the the location will be required when creating a new request.
- **Duration and Number of Resources in New Request –** If this option is checked, then the user will be asked to specify the expected duration of job and number of resources required.
- **Can Request Quote** – If this option is checked, then the user will be able to request a quote when creating a new Request.

Accept Job Requests from Web-page without user login

Accept Requests Without Login – Turn this setting on and a URL will be displayed. This URL can be sent to anybody, i.e. – residents in an apartment block who can then raise a Request without needing login details.

Accept Job Requests by Email

The following settings are applied for Job Requests by Email:

- **Accept Job Requests By Email** – Check this option if you want to be able to receive job requests by email, sent to a fixed email address of your choice. **Note**: you can enable this and still have requests created through the application.
- **Job Request Email Sent To** – This is the custom email address to which email requests need to be sent to. All email addresses are appended with @request.trackplanfm.com **Eg**: If ABCMaintenance was entered, the email address would be ABCMaintenance@request.trackplanfm.com. You can in

addition choose for users to send email requests to an email on your own domain, and then arrange with your IT team to forward these emails to this email specified here.***Warning** – When using an email address for accepting requests, please DO NOT use this email for a user in Trackplan. Otherwise notification emails sent to this user will in turn create requests!*

- **Default Site for New Requests** – This is the default site associated with your incoming email requests. Please choose a site to which job requests will be initially associated.
- **Cut Off Body Text** – Emails coming in from your users can contain text in the footer, for example company email signatures. So you can cut off this text by entering here text which matches a common string of characters which appear in the email just at the start of such text.
- **Validate From Address of Emails Sent In –** This option allows only requests from selected email domains to be accepted.

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Job Request Authorizations

- **Use** Authorisation **Process** – If this option is checked, then job requests can be sent for authorisation before they can be approved into jobs. Users can be given permission to authorise requests from the user detail page.

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Pending Requests Report

- **Enable Report** – This option will allow you to send reports of pending job requests.
- **Show Pending Requests that are # Days Overdue** – Set the amount of days old a requests should be before it is sent in the report.

Email Notifications to Requester

The following settings are applied for Email Notifications to Requester:

- **Send Email to Requester As Soon As Request Created** – This option allows a confirmation email to be sent to the requester.
- **Send Email Notification Upon Key Job Events** – This option allows for an email to be sent to the requester when a key job event has occurred – this is for requesters who create requests by email and have no login access. For requesters who have a login and are set up as a user, then you can manage this setting in the *Settings -> Users* area.
- **Fixed From Email Address To Use For Email Notifications** – This is the email address from which automated replies will be sent from.
- **Fixed From Name To Use For Email Notifications** – This will be the name on the automatic reply.

Guest Request App Captcha

- **Guest Request Captcha** – Enable Captcha for new job requests created in the Guest Request App
- **Guest Request Accept Terms** – Show an Accept terms box for new job request created in the Guest Request App. Leave empty to disable

Other Settings For Job Request

The additional settings are applied for Job Requests:

- **Enable Assets for Job Requests** – This option allows for assets to be viewed and attached to a job request when active. Once a job request is approved then the assets selected will be passed over to the job.
- **Enable Job Notes for Job Requests** – This option allows for notes to be viewed and created on a job request when active.
- **Show Client Logo** – Set to Yes and the Clients Logo will appear on the Requests form.

Make sure to *Save* any changes made.