

Trackplan Request App Introduction

The Request App has 2 main access levels.

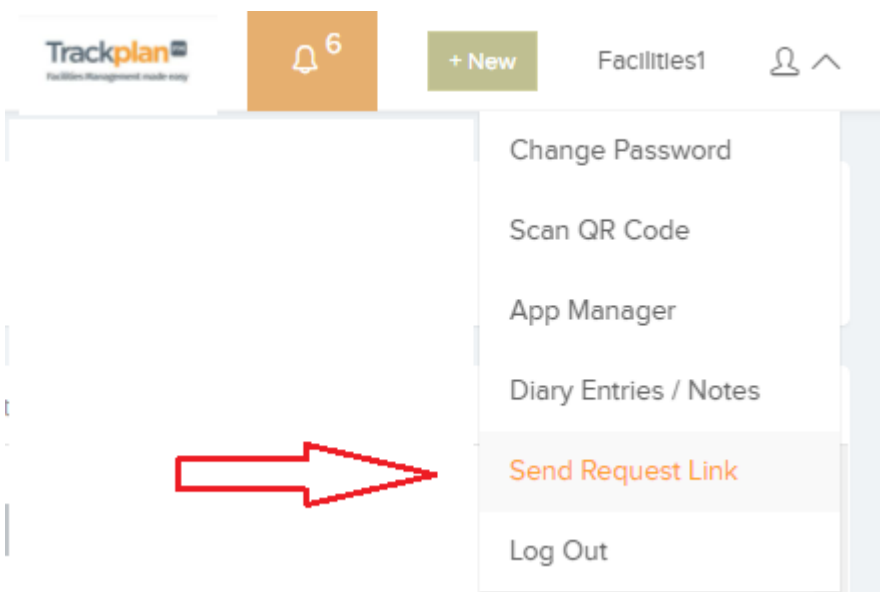
A Guest Access level and a User Access level.

Guest Access level

On the Site details page the client can generate a link that can be sent out to the tenant or staff member via email. When he/she clicks on the link they will be brought to the Request App with the Site and other fields pre-populated. All that is needed is for them to fill in the Request details.

As per image below click on the triple dots and then “Email Request Link For Site” – This will reveal a pop-up where you have the option to add a certain Location, Sub-location, Job Type, Sub Type, Asset and the Email Recipients.

This link can also be generated from the Location Details Page, Sub-location Details Page , Asset Details Page or at anytime from the drop-down in the top right corner of the screen.



Building No 1 test
Site Name

O'Connell Ave, Limerick, N 8, Limerick,
Limerick, B90 8AG
Address

Limerick
Town

Ireland
Country

Site Detail Locations (2) Planned Schedules (19) Assets (9) Documents (2) Forms (134) Contacts (1) Custom Fields

Main Sites List Edit Site New Job

| | |
|-----------------------|----------------------|
| Site Name | Building No 1 test |
| Code | r4 |
| Colour | <input type="text"/> |
| Region | Chilterns |
| Site Type | Client 8 |
| Contract | Client 8 |
| Default Assigned User | Robert Cox |
| Default Team | Not Selected |
| Operational | Yes |

| | |
|-----------|--|
| Address 1 | O'Connell Ave, Limerick, N 8, Limerick |
| Address 2 | Limerick |
| Town | Limerick |
| County | Limerick |
| Country | Ireland |
| Postcode | B90 8AG |

| | |
|--------------------|------------------|
| Site Comments | 0 comment |
| Site Warning Flag? | Yes |
| Site Warning Note | Be aware of dogs |
| Contractor Note | |

- Jobs
- Photo
- New Site
- Delete Site
- Email Request Link For Site

| | |
|-----------------|----|
| # Open Jobs | 16 |
| # Overdue Jobs | 14 |
| # Non Compliant | 14 |
| # Open Requests | 23 |

| | |
|----------------------|-------------------|
| Latitude | 52.3711476 |
| Longitude | -1.79927509999993 |
| Google Map Site Link | Site Map Link |

Email Requestor Link

Site: Building No 1 test

Location: (please select)

SubLocation: (please select)

Job Type: (please select)

Sub Type: (please select)

Asset: (please select)

Email Recipients:

Close Send Requestor Link

Below is what the tenant/staff member will see. Note that the Site is pre-populated.



Raise new request

Details *

Asset *

Job type *

Job sub-type

Site *

AbbeyCourt

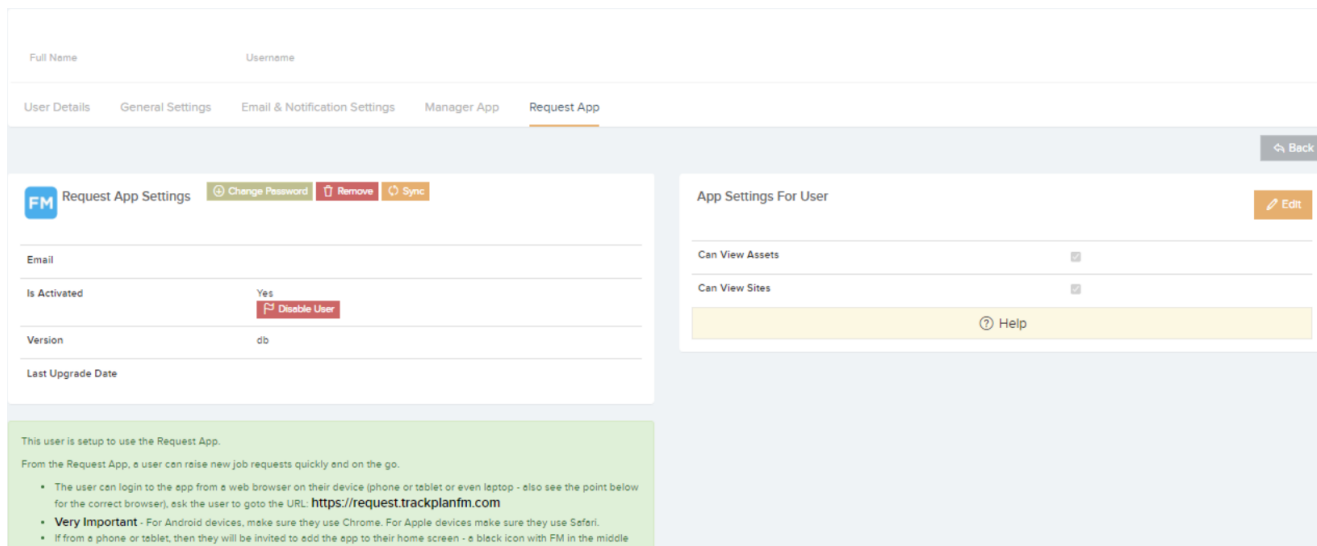
Location

Sub-location

RAISE REQUEST

User Access Level

In Settings -> Users -> Request App you can give Users access to the Request App. This User Access Level gives the User access to all Sites and Assets. He/She can view all previous Requests also.



The screenshot shows the 'Request App' settings for a user. The page is divided into two main sections: 'Request App Settings' and 'App Settings For User'.

Request App Settings:

- Full Name: [Blank]
- Username: [Blank]
- Buttons: Change Password, Remove, Sync
- Email: [Blank]
- Is Activated: Yes (with a Disable User button)
- Version: db
- Last Upgrade Date: [Blank]

App Settings For User:

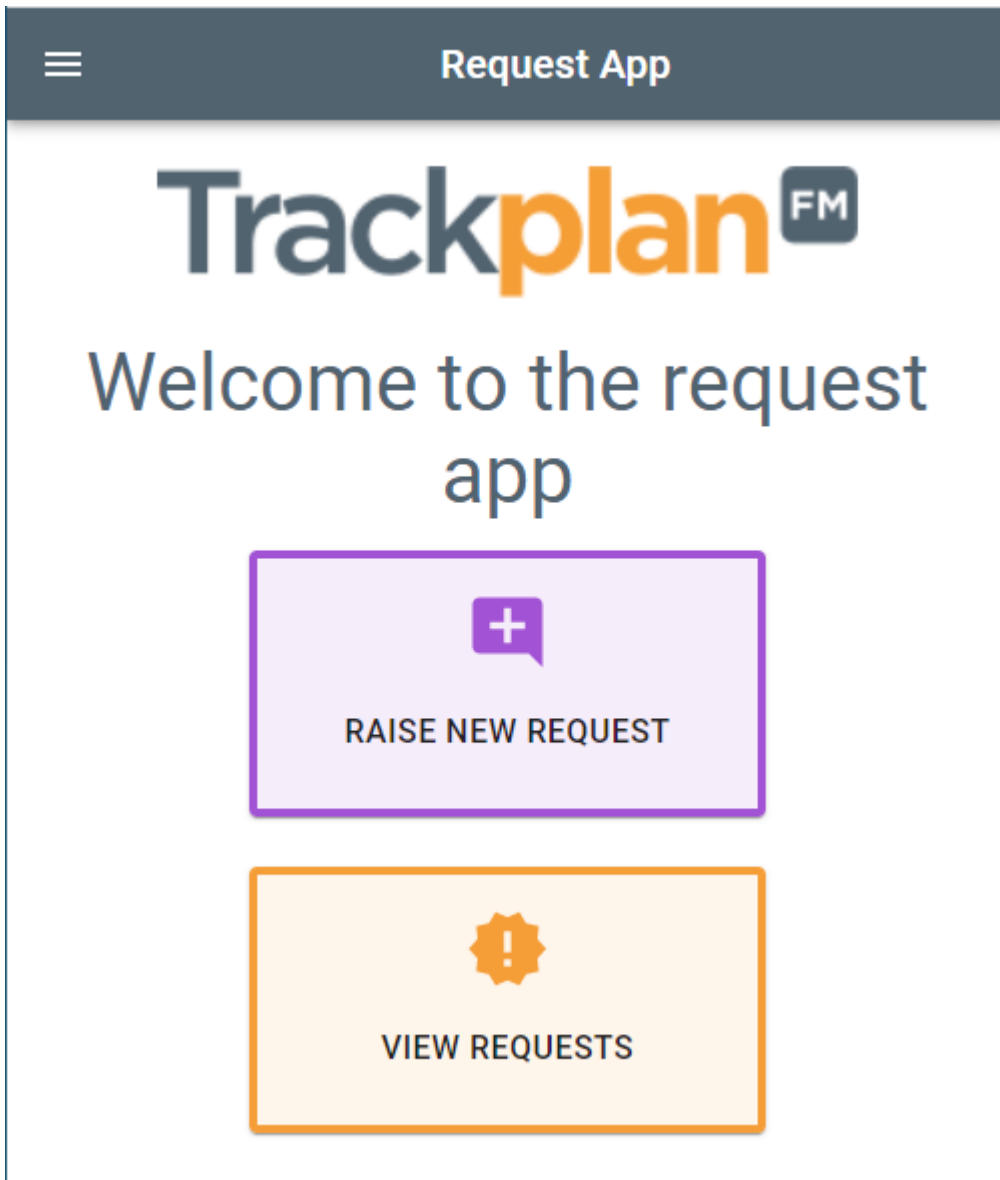
- Can View Assets:
- Can View Sites:
- Help button

Instructions:

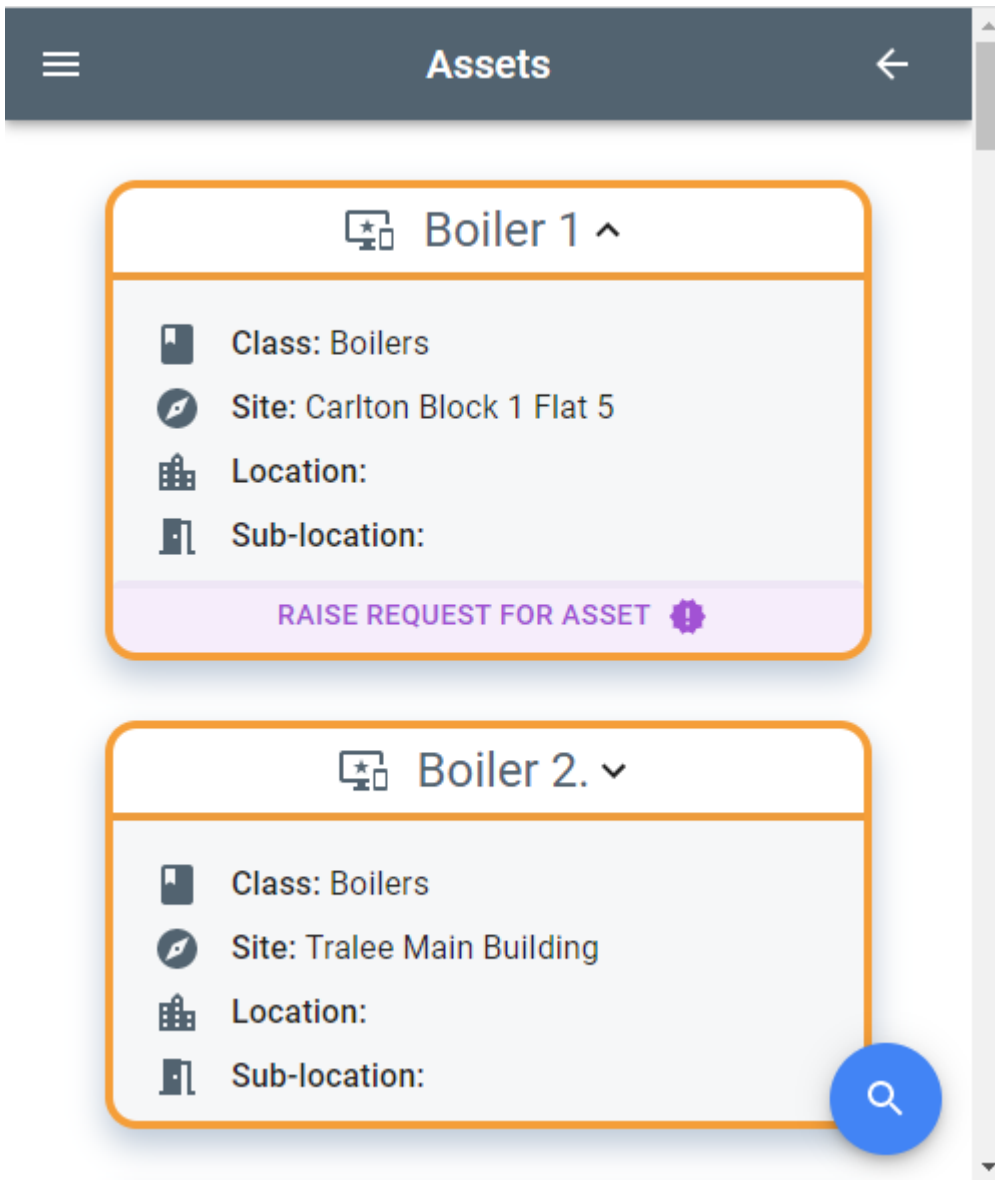
This user is setup to use the Request App. From the Request App, a user can raise new job requests quickly and on the go.

- The user can login to the app from a web browser on their device (phone or tablet or even laptop - also see the point below for the correct browser), ask the user to goto the URL: <https://request.trackplanfm.com>
- Very Important** - For Android devices, make sure they use Chrome. For Apple devices make sure they use Safari.
- If from a phone or tablet, then they will be invited to add the app to their home screen - a black icon with FM in the middle

The User can login via <https://request.trackplanfm.com/> and will be directed to the Homepage.



Depending on User Settings, you can have access to Sites and Assets from the Request App and have the ability to raise a request for a certain asset or site.



Settings in the Main application that will effect the Request App.

1.Settings → Job Requests → New Request Screen Settings:
(The below 2 settings will configure the New Request Screen in the Request App.)

- 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.

2.Settings -> Users -> General Settings -> Job Request Workflow Settings:

- Can Only View Own Job Requests – If set to yes then they cannot see job requests created by other users.