

Trackplan Request App Introduction

The Request App has 2 main access levels.

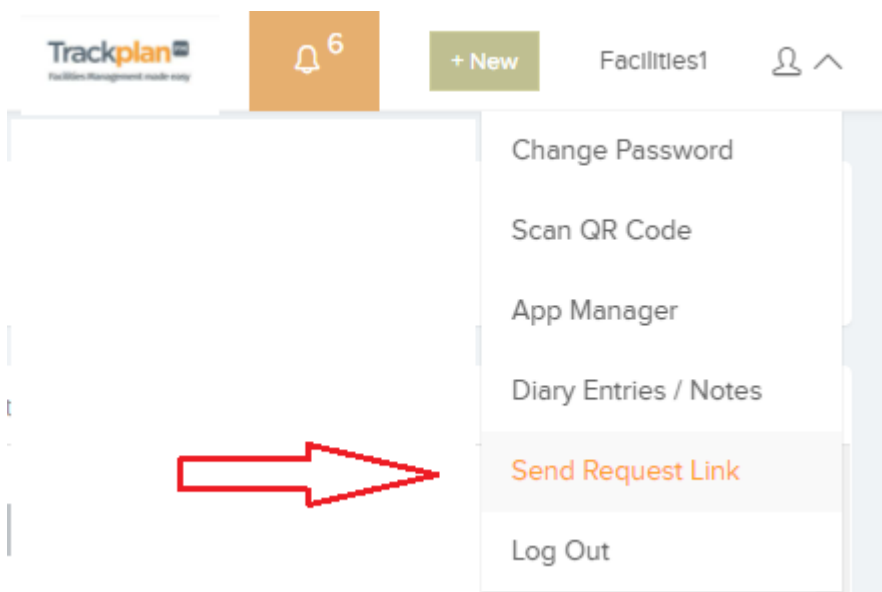
A Guest Access level and a User Access level.

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

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

Main Contact

Declan Murphy

Email

Julie@randstad.co.uk

Telephone

085 242 6071

Fax

Site Comments

e 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

Site Area

Calculated Area

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 interface includes a top navigation bar with tabs for 'User Details', 'General Settings', 'Email & Notification Settings', 'Manager App', and 'Request App'. The 'Request App' tab is active. On the left, there's a 'Request App Settings' section with fields for 'Email', 'Is Activated' (set to 'Yes'), 'Version' (set to 'db'), and 'Last Upgrade Date'. Action buttons for 'Change Password', 'Remove', and 'Sync' are present. On the right, the 'App Settings For User' section shows 'Can View Assets' and 'Can View Sites' both checked. A 'Help' button is at the bottom of this section. A green box at the bottom provides instructions on how to use the Request App, including the URL <https://request.trackplanfm.com> and a note about using Chrome or Safari for mobile devices.

Full Name	Username
User Details General Settings Email & Notification Settings Manager App Request App	

Request App Settings Change Password Remove Sync

Email

Is Activated: Yes Disable User

Version: db

Last Upgrade Date

App Settings For User Edit

Can View Assets: ☒

Can View Sites: ☒

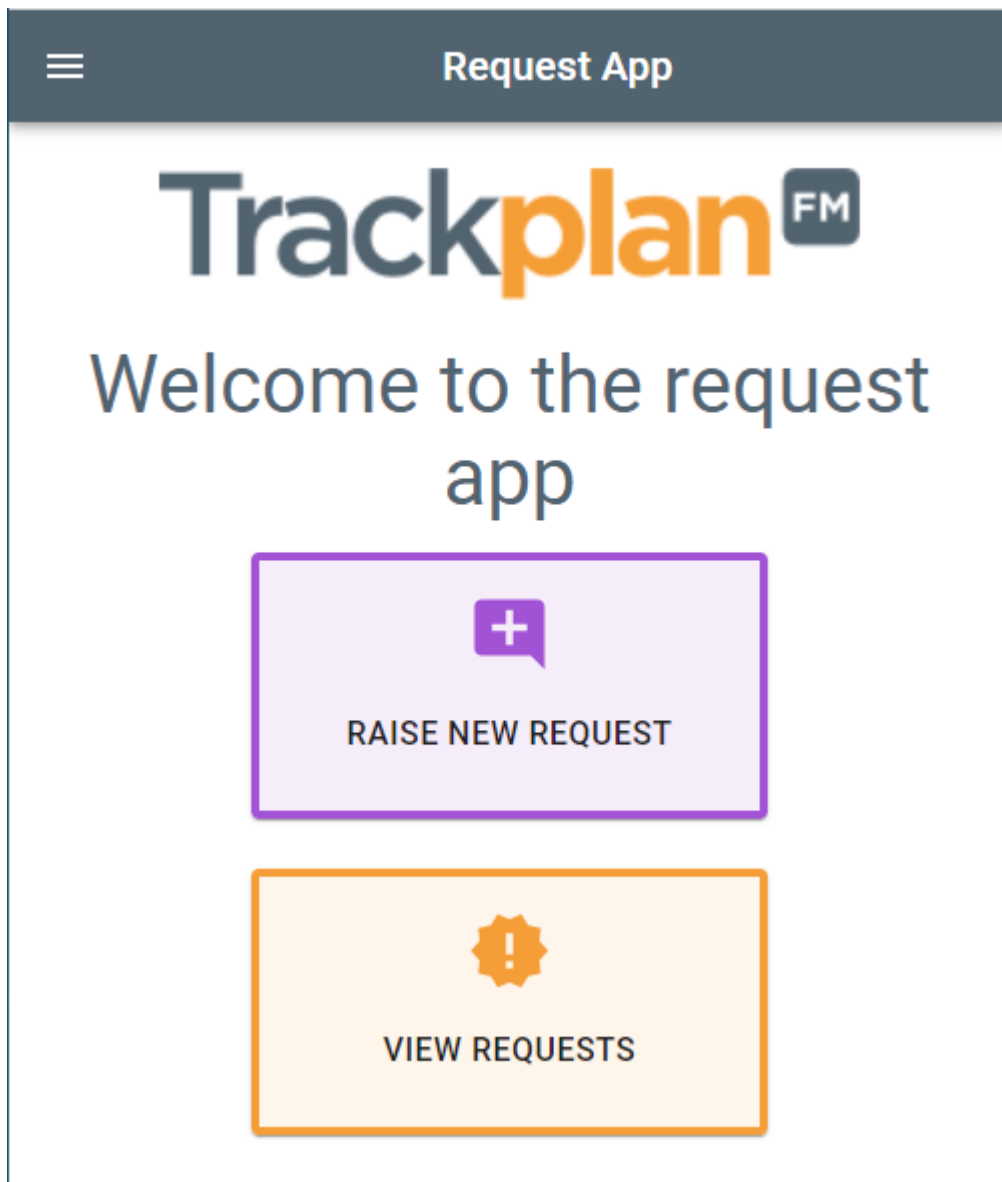
Help

This user is setup to use the Request App.

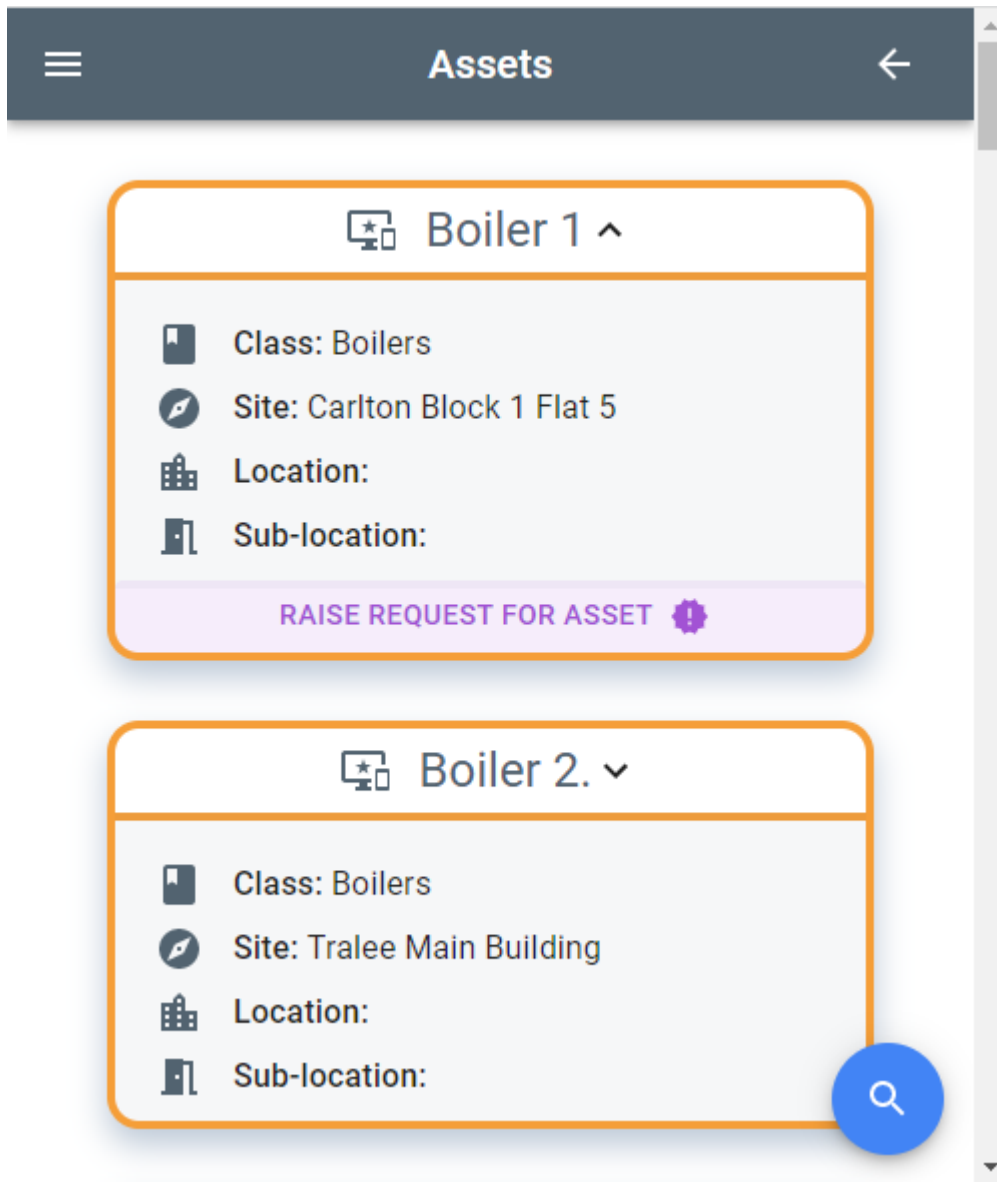
From the Request App, a user can raise new job requests quickly and on the go.

- 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.