



Release 29th November 2023

## SUMMARY

### Key Features & Improvements:

- Message Basket - New Messaging module for incoming emails from resources, 3rd party systems and requests.
- Request weblink on new request email to aid better communication on job requests between the request creator and your helpdesk using job notes
- Escalation Rules improvements - new trigger event "Job Complete", plus form link in escalation email so you can send out satisfaction / feedback forms when a job is complete.
- Job Details page - improved layout.
- New Job Screen features - Site address under site dropdown. Can upload a document. Warning message for user.
- Forms, Data Exports and Reports sent to user's email.
- Asset status times (previous status and status change dates now added)

*Main Application v23.7.0*

*Manager App v12.0.10*

*Resource App v12.2.7*

*Request App v2.3.3*

Release timetable	
Date and Time of Release	Which Servers
29/11/2023 From 9pm (GMT)	app.trackplanfm.com app4.trackplanfm.com axxxk.trackplanfm.com h*****b.trackplanfm.com
30/11/2023 From 11am (GMT)	app2.trackplanfm.com
30/11/2023 From 9pm (GMT)	app3.trackplanfm.com
01/12/2023 From 9pm (GMT)	s****y.trackplanfm.com
08/12/2023 From 9pm (GMT)	d**o.trackplanfm.com

Coming Soon in Future Releases:
<ul style="list-style-type: none"> <li>- Merge the Manager App, Resource App and Request App into one app. This is very close, and it is due for release by 8<sup>th</sup> December 2023. The existing apps will continue to work, but you will be encouraged to move to the new single app. The new URL to access and download the single App will be <a href="https://mobile.trackplanfm.com">https://mobile.trackplanfm.com</a>. We will be sending out more information on this shortly.</li> <li>- Request Authorisations. (due end of December 2023)</li> <li>- QR Codes for electronic forms. Work started (due end of December 2023)</li> <li>- Devices and Meter Readings, with Charts, Thresholds and PPM driven by readings. (2024)</li> <li>- Room and Asset Booking (2024)</li> <li>- Graphs and charts for Form results (2024)</li> <li>- View and interact with PDFs and image. Great for seeing your assets on floorplans etc. (2024-2025)</li> </ul>

## Work done for this Release.

### Message Basket.

#### Why is it useful?

This new messaging module is a very useful feature that could have many benefits for you. Any emails you currently receive from other software systems or 3<sup>rd</sup> parties can be captured as messages in Trackplan. This will include any attached documents. And you will be able to associate these messages to a job if there is sufficient information on the incoming email.

And you can make actions happen automatically on receipt of the message. For example, to create a new job or request, or to complete a job task.

For example, you have a BMS system or Health and Safety software that sends out emails on a specific event such as problem with the Fire System. You can then route this email to the Message Basket and create a job off the back of the message.

Another example, some of your larger contractors send out automated emails on the progress of a job. These can be routed to a Message Basket and associated to the job they are connected to. And take actions such as complete the job task.

#### Details:

You will need to set up a different Message Basket for each type of email you receive specifying the from email and to email address. And you will need to forward on these emails to a specified email address within our software.

## Message Basket - Details

Name	BMS System
To Email Address	m111@request.trackplanfm.com
From Domain	groupherve.com

Created By	mark1 m
Created Date	05-10-2023 14:25

### Association Rules

Name	Type	Code/Name	Prefix	Suffix	Resc
site association	Site	Code	site_		

◀ ◁ 1 ▷ ▶ 10 Items Per Page

[? Help](#)

### Action Rules

Name	Type	When To Create	Matching Text	Creator User	Priority	Reported By
Create job	Create a New Job	Only when certain text found	Alert	Darren McGill	Urgent	

◀ ◁ 1 ▷ ▶ 10 Items Per Page

## Request weblink

### Why is it useful?

To improve communication between the person creating the request and your helpdesk.

A weblink can be added to the emails sent to the requestor when they have created a new request.

When they click the weblink it will bring them to the Request details page. They will then have the ability to add a note on their request or upload a photo or document.

When they add a note to the request this can send an email to users who normally receives an email when a new request is created.

And whenever a help desk user adds a note to the request, they can send an email to the requestor which will include the same weblink so they can access and update the request.

This will be particularly useful for people creating requests without user access to the main application. In other words:

- Creating requests by sending in an email
- The guest request app (from QR codes associated to a site, location or asset)
- From the new request screen set up outside of the main application (eg on your intranet)

### Details:

Add the weblink to the Email Template "To Requestor on new job request" as shown below in the Settings area:

# Email Templates

To Requestor on new job request

Subject

New Request #: [request number]

Body

Format

**B**

*I*

U

☰

☰

☰

✍

✍

☰

☰

(inherited font)

(inherited size)

**A**

💧

*Thank you for sending the request to the facilities team. Your job request number is [request number]. We will further notify you when the request has been approved and the job completed.*

**[RemoteRequestDetailsLink]**



Also add it to the email template “To Requestor On Job Request Note”

**When the requestor clicks on the link they will see something like below:**

The screenshot shows a job request details page. On the left, there is a 'Description' section with the text 'test request from anonymous page'. Below this are several fields: 'Site Reference' (1045), 'Site' (10:45), 'Location', and 'SubLocation'. On the right, there is a 'Request For Quote' section with 'Request For Quote' (No), 'Job Type' (Aa test type), 'Sub Type', 'Raised By' (Remote User kim tracker), and 'Raised By Email' (trackplan@trackplanfm.com). At the top right, there is a 'Status' section with 'Status' (Pending) and 'Created' (29/11/2023). At the bottom, there is a 'Job Request Notes' section with an 'Excel' button and an 'Add Note' button. Below the notes section, there is a table with columns for 'Note', 'By', and 'Date/Time', and a message 'No Job Notes'.

# Job Details page - improved layout.

## Why is it useful?

The job details screen is the most important screen in the system so we have improved and reorganised the layout by changing the number of columns from 4 to 3, creating more panels, keeping the important information visual and hiding the least important information which can be toggled to display within its panel. We have also extended the width of the Job Notes section so it will take up the full width of the screen.

## Details:

The screenshot displays the 'Job Details' page for 'Test Notification Job 1'. The page is organized into several panels:

- Job Information:** Job No. 1417, Site 000 MARK, Status More Work Required. Includes tabs for Job Details, Job Tasks (30), Visits, Costs, Quotes (1), Assets (6), Documents (16), Alerts, Forms (14), Time Records (1), Stock (1), and Purchase Orders.
- Team & Resource:** Team Test, Assigned To Advisors, Resource saj@contractor.com.
- Timeline & Dates:** Due Date 22/11/2023 15:18, Expected Dates (Start: 22/11/2023 15:18, Complete: 22/11/2023 17:18), Expected Duration 2.00 Hours, Date Created 22/11/2023 13:19.
- Client & Contract:** Client Contract Client 3, Site Name 000 MARK, 28 O'Connell Street, Limerick, V54X2YF, Ireland, Code: www.
- Job Specifics:** Job Status More Work Required, Sub Status Stalled Task, Priority 2 hour response, Quote Job False, Order No 1417, Job Type Fire, Actual Costs 18.00.
- Notes Section:** A table listing notes with columns for Note, By, Date/Time, Task, Status, Type, and Less Email Sent. It includes notes about task completion and status changes.

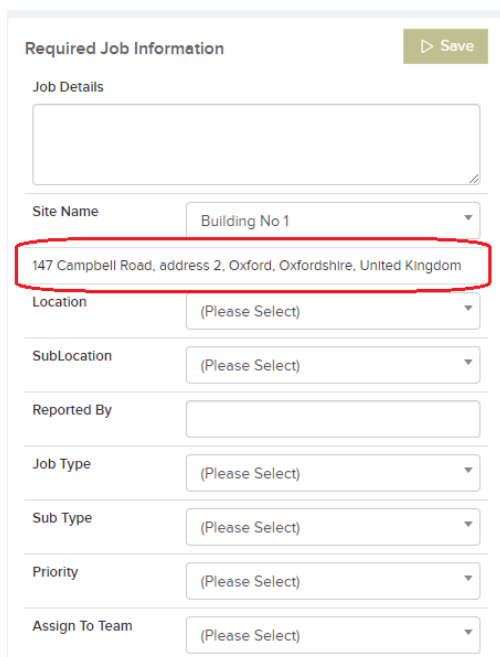
## New Job page - improvements

### Why is it useful?

1. Showing the site address under the site dropdown will give greater visibility to users and eliminate jobs getting raised against the wrong site.
2. The ability to upload a document at the point you create a job will speed up internal processes.
3. You can configure a warning message to display on the new job page for all jobs or for specific client contracts.

### Details:

1. Site address under site dropdown.



Required Job Information Save

Job Details

Site Name Building No 1

147 Campbell Road, address 2, Oxford, Oxfordshire, United Kingdom

Location (Please Select)

SubLocation (Please Select)

Reported By

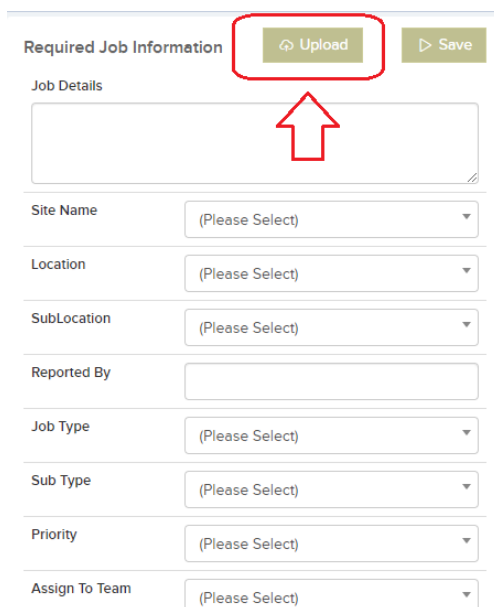
Job Type (Please Select)

Sub Type (Please Select)

Priority (Please Select)

Assign To Team (Please Select)

2. Can upload a document.



Required Job Information Upload Save

Job Details

Site Name (Please Select)

Location (Please Select)

SubLocation (Please Select)

Reported By

Job Type (Please Select)

Sub Type (Please Select)

Priority (Please Select)


Assign To Team (Please Select)



### 3. Warning message for user.

This can be configured in **Settings** → **Job Settings** and also in **Finance** → **Client Contracts**.

Create a New Job

 Did you consult management before raising the job?

Required Job Information

 Upload

 Save

Job Details

Site Name

(Please Select) 

Location

(Please Select) 

SubLocation

(Please Select) 

Reported By

Job Type

(Please Select) 

Sub Type

(Please Select) 

Priority

(Please Select) 

Assign To Team

(Please Select) 

## **Excel Exports from data grids and Reports sent to user's email for large exports.**

### **Why is it useful?**

This new improvement will speed up the user experience when exporting over 1000 rows of data from the main data grids and reports. The software will run in the background and email the excel file directly to the user when ready. You will no longer have to wait for the excel file to be generated.

### **Details:**

1. If the excel export from the data grid or report is going to be over 1000 rows, it will send an email to the user's email address. It will also be available in the Document Manager in the "Report" category.
2. The data grids are affected include the job list, site list, asset list, job task list, job cost list, form result details (with all form columns)

## Asset status times – recent asset status changes shown on the job grid and asset grid.

### Why is it useful?

The status of an asset can be changed, either from the asset page within the main application or within one of the app. And a history of all asset changes is maintained and can be viewed for each asset.

We have added columns to the asset list and job list, so you can see for each asset or associated job the current asset status and previous asset status and the corresponding dates and times when they were changed. This will help reporting for clients that manage the update the status of their assets regularly.

### Details:

You will need to display the columns on the asset list and job list using the column configurator as shown below:

The screenshot displays the 'Job List' interface. On the left, a 'Columns' menu is open, showing a list of columns with checkboxes:  Asset,  Asset Code,  Asset Comments,  Asset Status,  Current Asset Status Changed Date,  Previous Asset Status,  Previous Asset Status Changed Date,  Order Number,  Project,  Job Budget,  Revenue Job, and  Cost Stage. The 'Columns' menu also includes 'Columns', 'Save Columns', and 'Reset Columns' options. The main interface shows a job list with columns for 'Number', 'Job Number', 'Location', and 'Status'. A job entry is visible with 'No 1' in the 'Number' column, 'Floor 1' in the 'Location' column, and an 'Instructed' status tag. The top right of the interface features a notification bell with '17' and a '+ New' button.

## Escalation Rules improvements. Job Completion and Feedback forms.

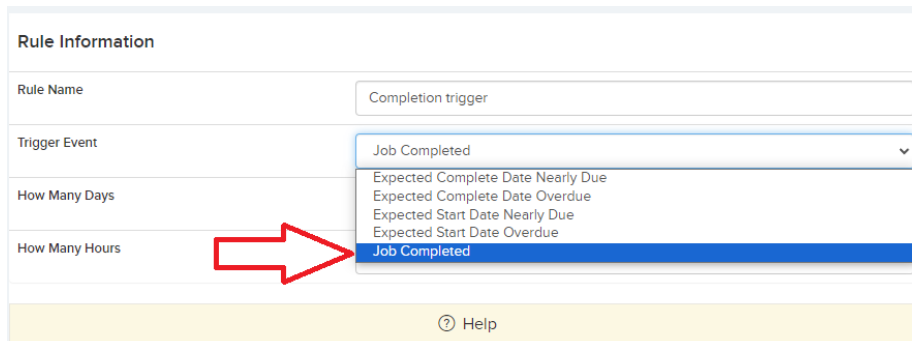
### Why is it useful?

1. We have added a new trigger event 'Job Completed'. You can then have an email sent to a team of people in your organisation as soon as a certain type of job is completed. You can also apply filters for Job Priority, Site, Job type for example to restrict the email to be sent out for only certain kinds of job.
2. On the body of the email to be sent out on job completion you can include a weblink to any form you have already designed.
3. For example you can send out a feedback form to the person who first created a job request to get their feedback on the job once complete

### Details:

Goto Settings -> Escalations

1. There is a New trigger event "Job Complete"



Rule Information

Rule Name: Completion trigger

Trigger Event: Job Completed

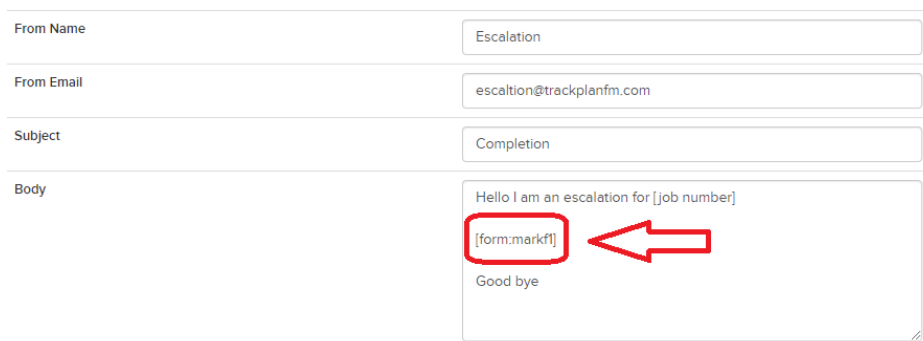
How Many Days: [empty]

How Many Hours: [empty]

Help

2. Form link.

When creating your form in the Form module the setting "Can Form be sent out by email to remote users" must be enabled for this to work. You will then copy and paste the tag **[form:formname]** into the email body and replace 'formname' with the actual name of your form.



From Name: Escalation

From Email: escalation@trackplanfm.com

Subject: Completion

Body: Hello I am an escalation for [job number]  
[form:markf]  
Good bye