Solution Note M-01 - Better Visibility of Tasks in Field

How to communicate and view your plan when out in the field with Touchplan

Problem Statement

While walking around on our job sites, we often run into the need to reference our plan to communicate what should be happening on a given day. Unless we have a physical print or photo of the plan, we need to go all the way back to the site office to look at the white board or computer. This takes time away from the work in the field and can lead to miscommunication about what is planned for the day.

Solution

Touchplan can be opened from your mobile device to reference your activities for the day and avoid confusion on what should be happening. Any user can review activities, their needed handoffs, and communicate the plan out to the rest of the team in the area.

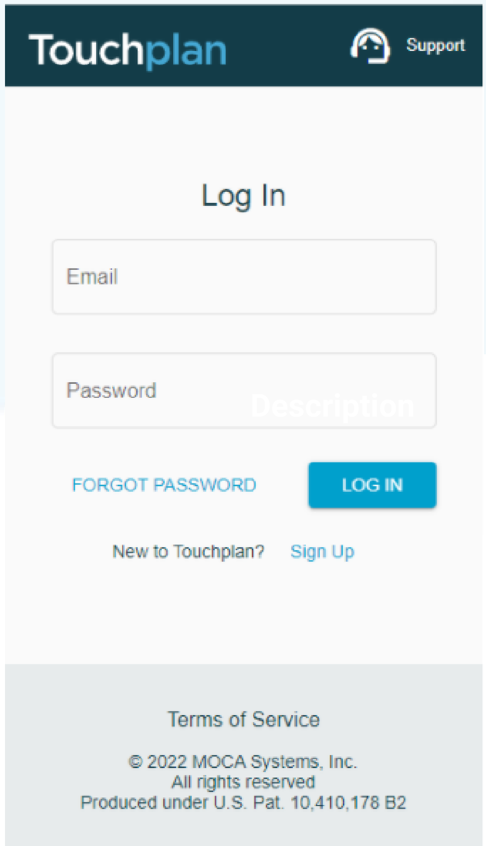
Related Materials

Object	Link	Description
Video	Intro Video	New Mobile Video Coming Soon
FAQ	Use Mobile	Touchplan Mobile Planning User Guide
Touchplan Mobile Planning	Mobile Planning	Touchplan Mobile Planning Website

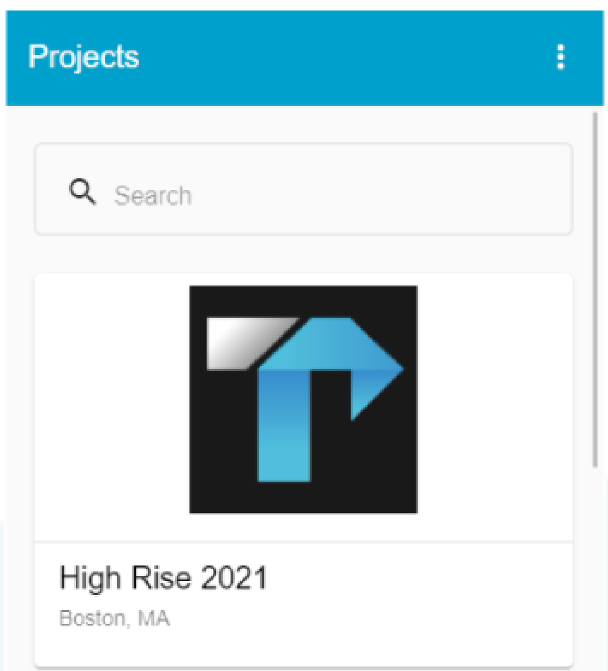
Touchplan

Step-by-step instructions

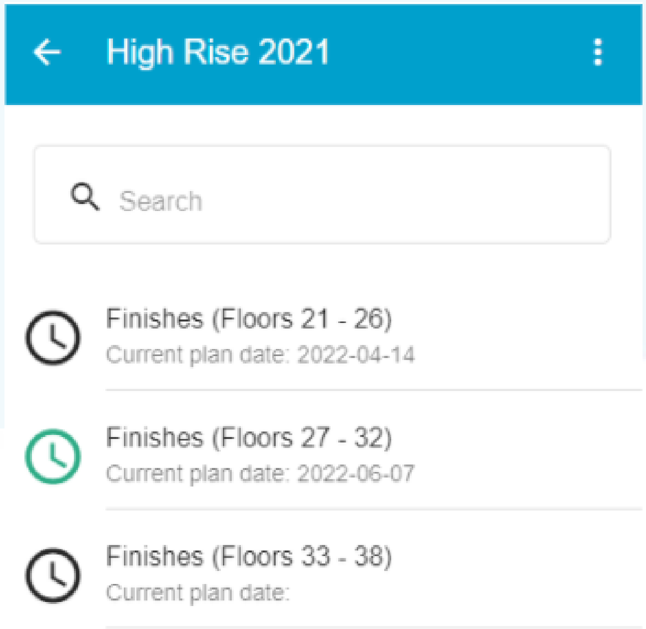
1. Log into Touchplan mobile at https://m.touchplan.io/



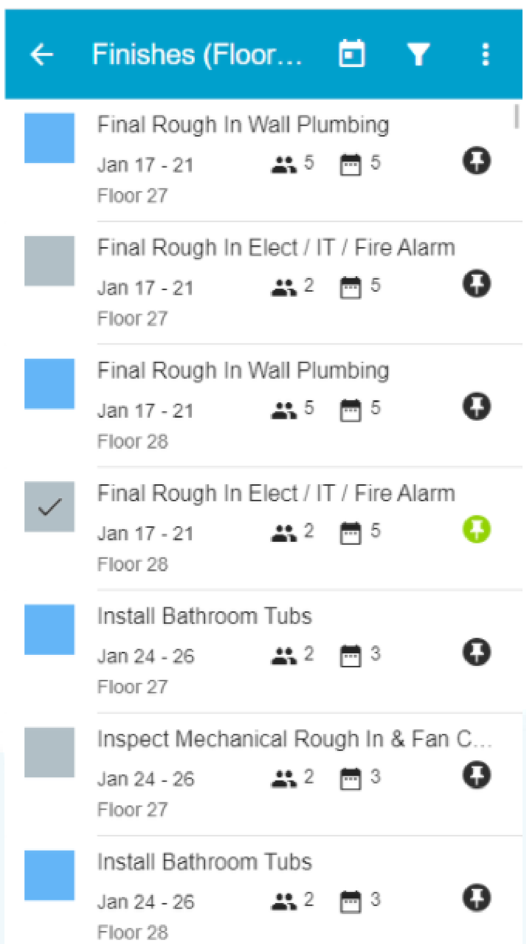
2.. Select your project from the Project List



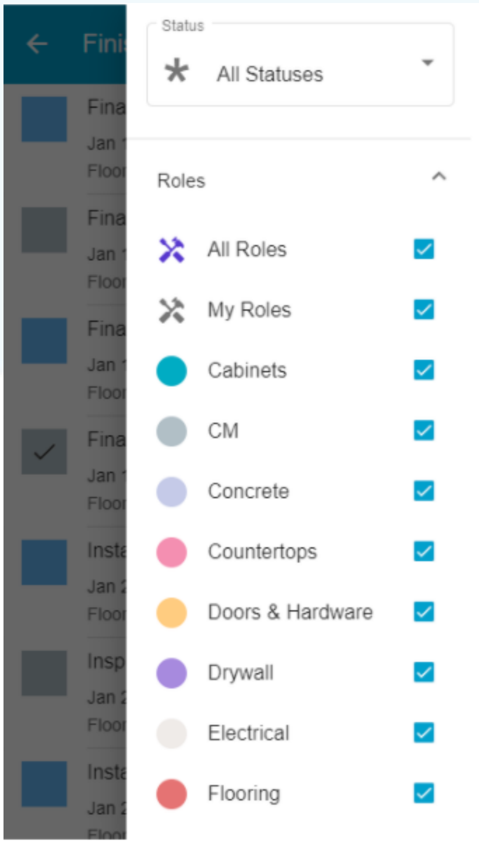
3. Select a plan from the Plan List

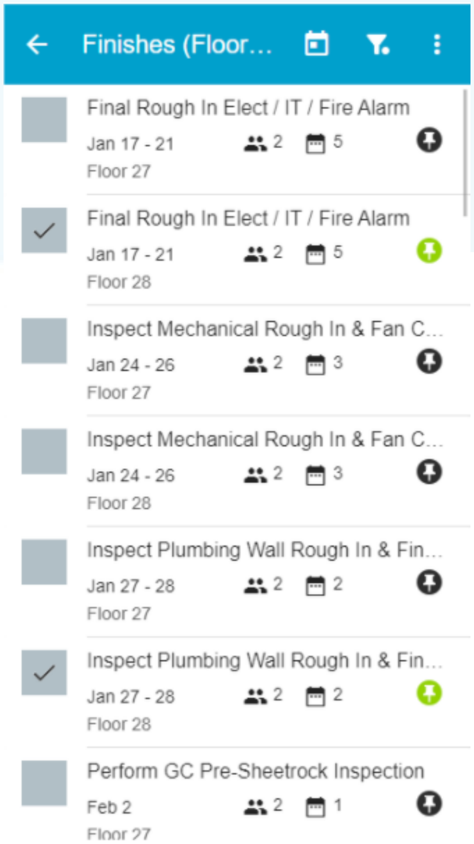


4. Select the filter icon



5. To see only tickets for your roles
   1. Select the All Roles checkbox to turn all role filters off
   2. Select the Mr Roles checkbox to only see tickets for your roles
   3. Select the plan in the background or close the filter to return to the ticket list





Help is available

For help with creating custom fields, visit the FAQ here:
[Use Image Attach | Touchplan.io Help Center]

For help exporting a plan or project CSV, visit the FAQ here:
[Export Reports | Touchplan.io Help Center]

For live help, click on the “Support” drop down in the top right corner of your planning screen and click the “Live Chat” button. This will connect you to a CS representative who will be able to answer any questions that you may have.

Issues, concerns, defects in this note?

We welcome any feedback you may have on this note to help us continually improve our materials and provide the best support that we can to our customers.

Please send any comments, suggestions, or reports of errors to the CS Live Chat