

Solution Note M-02 - Update Status While in the Field

How to update the status of activities while walking around the job site with Touchplan

Problem Statement

Having a real time status update of the work happening on site can enable us to make quicker, more informed decisions. Teams typically will walk the job site to review the status of activities, but have to go back to the site office and their computer to update the status. This leads to the potential to lose information along the way as well as needing to handle the data multiple times.

Solution

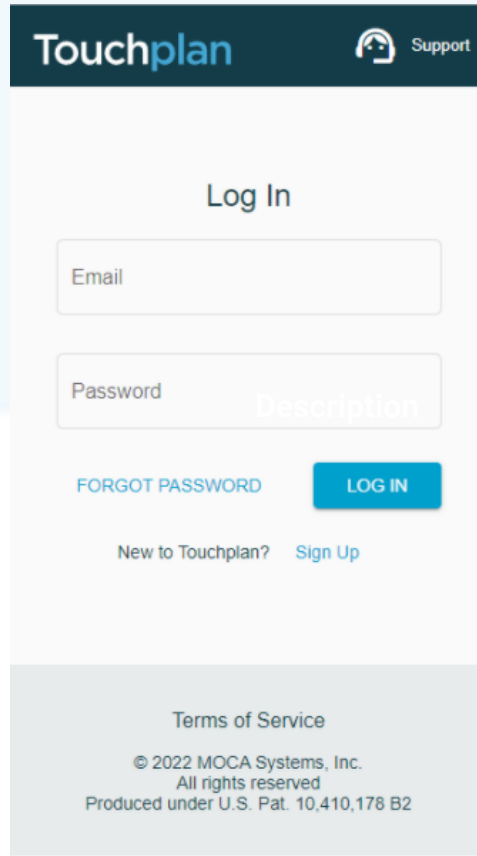
Touchplan can be accessed from your mobile device to reference and update the status of work right from the field. Activities can be reviewed, updated, and statused with a few taps of the phone without needing to leave the field.

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

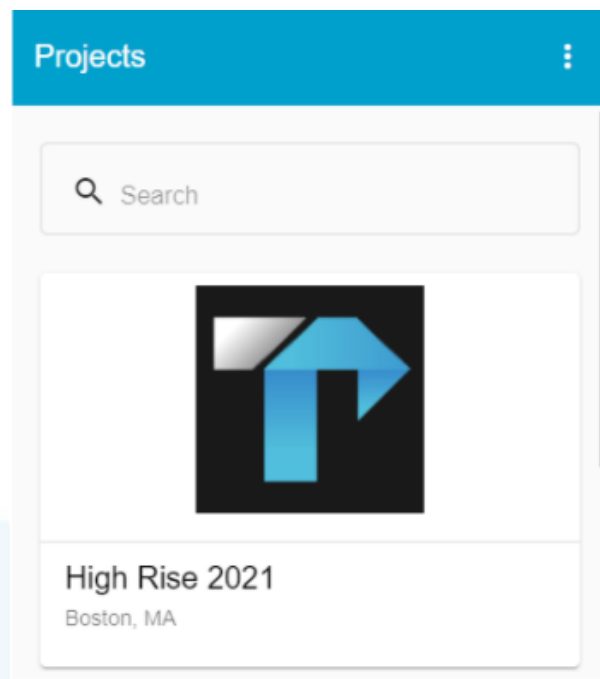
Step-by-step instructions

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

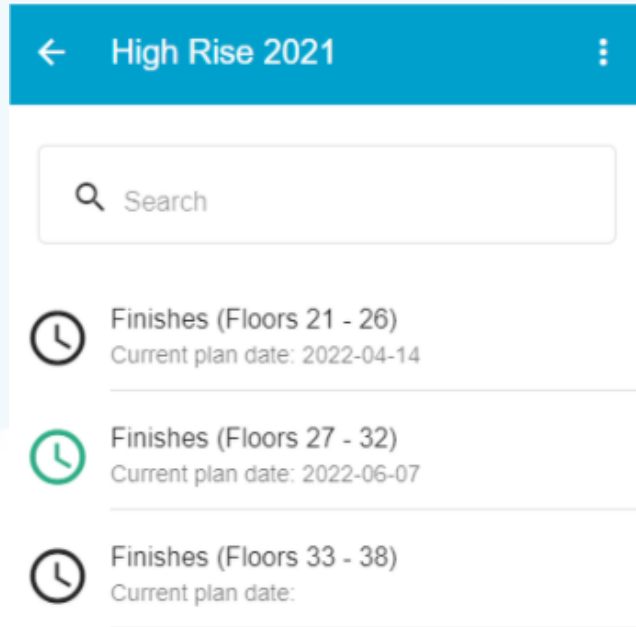


The image shows the login screen of the Touchplan mobile application. At the top, there is a dark blue header with the 'Touchplan' logo on the left and a 'Support' icon on the right. Below the header, the text 'Log In' is centered. There are two input fields: 'Email' and 'Password'. The 'Password' field has a 'Description' label to its right. Below the input fields, there are two links: 'FORGOT PASSWORD' and a blue 'LOG IN' button. At the bottom of the login section, there is a link 'New to Touchplan? Sign Up'. The footer contains the text 'Terms of Service', '© 2022 MOCA Systems, Inc. All rights reserved', and 'Produced under U.S. Pat. 10,410,178 B2'.

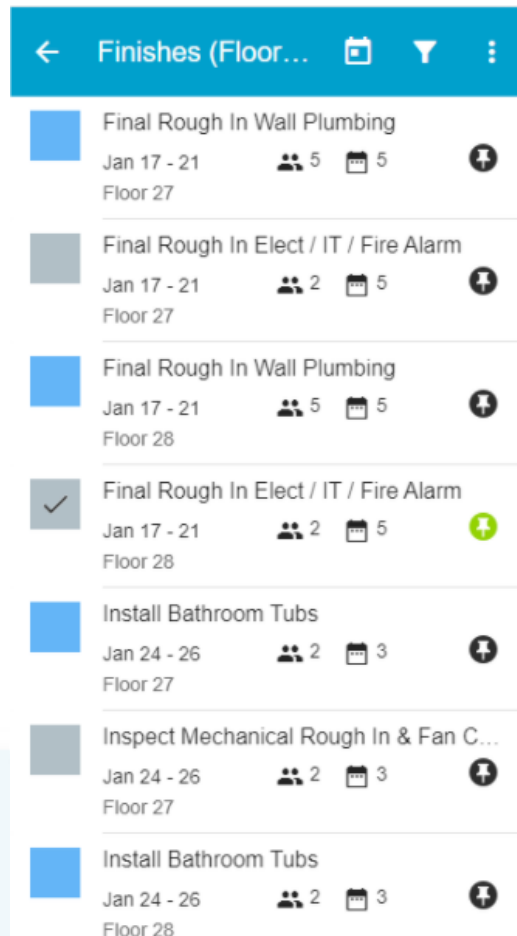
2.. Select your project from the Project List



3. Select a plan from the Plan List



4. Select your ticket from the Ticket List



5. Select Update Status

1. If changes need to be made to the planned ticket, enter the changes and then select Save
2. If no changes need to be made to the planned ticket, select Save

Inspect Mechanical Roug...

Update Status

Start - Actual 1/24/2022

Finish - Actual 1/26/2022

Crew 2 Days 3

Workdays January 2022

Mon 24 Tue 25 Wed 26

CANCEL SAVE

CLOSE

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