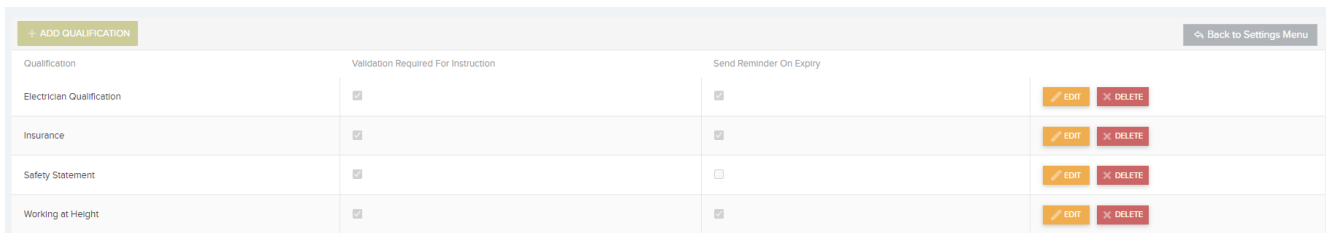


Resource Qualifications

In Settings → *Resource Qualifications* you can create new Qualifications that can be used to manage and vet your contractors' capability and qualifications.

To set up a qualification select the *Add Qualification* button at the top-left of the page:



Qualification	Validation Required For Instruction	Send Reminder On Expiry	
Electrician Qualification	☒	☒	EDIT DELETE
Insurance	☒	☒	EDIT DELETE
Safety Statement	☒	☐	EDIT DELETE
Working at Height	☒	☒	EDIT DELETE

This creates a row in the qualifications list where you can

- Name the qualification
- Set **Validation Required For Instruction** which will prevent jobs and tasks being instructed to the contractor. On the resource detail page, you can update whether the contractor has been validated or not which will determine whether they can be instructed.
- Set **Send Reminder On Expiry** which will notify nominated Users within 24 hours of the qualification expiring and every 2 days until the qualification date for that resource is updated .

Once you have finished inputting the Qualification information, select *Update* to save the new Qualification and add it to the list.

You can also *Edit* and / or *Delete* the *Qualification* information once it has been added to the list.

After setting up the Qualifications in the settings area you can now go to the Resource Details page and click on the 'Qualifications' Tab.

Contractor 1				Available				Pending			
Resource Name		Resource Address		Availability Status				Compliance Status			
Details	Regions & Trades	Portal & App	Documents	Qualifications (2)	Availability	Contacts	Forms	Billing	Stock	Custom Fields	

From there you can view all the qualifications and set the Expiry Date and whether or not the Resource is validated.

Qualifications			
Qualification Name	Expiry Date	Validated	
Insurance	31/12/2021	☒	EDIT
Safety Statement		☐	EDIT

Next step is to nominate Users to receive the email notifications. This can be done in Settings → Users → User Details → Email & Notification Settings.

User Details	General Settings	Email & Notification Settings	Manager App	Request App
Back Edit				
Job/Task Email Settings		Resource Email Settings		
Receive Email When Job Assigned To This User or User's Team: Yes		Receive Email When A Resource Leaves Task: Never		
Receive email when job is completed: Jobs Created by the User		Receive Email When Time Sheet is Submitted By Resource: No		
Receive Email When Job is Approved: No		Receive Reminder When Resource / Contractor Qualification Expires: Yes		
Receive Email When Planned Job Overdue and the Assigned User for the job: Yes		Receive Notification When Resource Adds Note Or Document to a job task, and this user is the assigned user: No		
Receive Email and Notification On Key Job and Task Events: No				
? Help		? Help		