

# Contractor Portal Set-up

Internal or external Contractors can be given access to the Contractors Portal from the *Portal & App* tab on the Resource Details page.

Greenfinger1	19, Main Street, , Limerick	Available	Approved							
Resource Name	Resource Address	Availability Status	Compliance Status							
Details	Regions & Trades	Portal & App	Documents	Qualifications (4)	Availability	Contacts	Forms	Billing	Stock	Custom Fields

From here the *Online Portal Settings* Column has a number of settings to allow access.

1. Can Login? – Set this to YES to allow access
2. Username – Set a Username
3. Password – Set a Password
4. Show Message When Completing Task
5. Must Acknowledge Message Before Completing Task
6. The Message Upon Completing Task – This message relates to setting 4 & 5
7. Landing Page on Logging in – Choose from Grid View, Mobile Friendly or Dashboard
8. Show Job Budget Information on Job Details
9. Can Reassign Job Tasks To another Resource

## Online Portal Settings

Access through the usual login screen in your web browser - Requires Internet Connection

Can Login ?

☒ Yes ☐ No

User Name

greenfinger1

Password

[↩ Change Password](#)

Show Message When Completing Task

☐ Yes ☒ No

Must Acknowledge Message Before  
Completing Task

☐ Yes ☒ No

The Message Upon Completing Task

Landing Page on Logging in

Grid View

Show Job Budget Information on Job  
Details

☐ Yes ☒ No

Can Reassign Job Tasks To another  
Resource

☐ Yes ☒ No

[? Help](#)

There are 2 other sections on this page with settings related to the Contractors Portal.

### 1. **Settings Common to the Online Portal and Resource App**

- **Completing task completes the job** – The job will only be completed once all tasks are completed.
- **Require Customer Signature** – A signature is required in

order for the job to be closed and completed.

- **Require Photo Before Completes Task** – A photo is required in order for the task to be closed and completed.
- **Enable Location / GPS Tracking for Engineers** – This allows tracking of location and will display on the completed job.
- **Enable Stock** – Allows the resource to attach stock to the job.
- **Assets Enabled** – Allows the resource to view and create assets.
- **Can Add Assets** – Allows the resource to add assets.
- **Enable Quotes** – Allows the resource to create and submit quotes.
- **Enable Costs** – Allows the resource to create and submit Costs.

## **2. Job/Request Settings Common to the Online Portal and Resource App**

- **Can Create Job or Request** – this allows contractors to be able to create jobs on the fly from the app. Setting this to No will disable the subsequent settings below.
- **Creating Job From App Creates Request Or Job** – this determines whether a new issue created from the app is created as a new job or a request. Setting this to “Request” will disable the “Allow Self Delivery For New Jobs” setting.
- **Allow Self Delivery For New Jobs** – this allows contractors using the app to create and deliver new jobs created from the app.
- **Ask for Date or Priority** – When a user creates a request/job this allows date, priority or neither to be shown to the contractor.

***Access can also be given via a link sent out on the Instruct email to the Contractor.***

**Step 1.** – Go the 'Email Templates' in the Settings Area.

### Email Templates

You can design email templates to use when sending emails to users and resources / contractors triggered by key events in the system.

**Step 2.** – Click on the *Job Tasks* tab and then on either 'To Contractor on instruction 1' or 'To Contractor on instruction 2'

Email Template Categories:-

Jobs Job Requests Finance **Job Tasks** Other

Choose Email Template:

- To Assigned user when contractor adds note on task
- To Assigned user when contractor signs off task as complete
- To Assigned user when contractor uploads document
- To Assignee and Resource when task reallocated
- To Assignee on job task assignment
- To Assignee on task completion by internal user
- To Contractor on Instructed 1 Day or More Overdue
- To Contractor on Instructed Task Just Overdue
- To Contractor on instruction 1**
- To Contractor on instruction 2**
- To Contractor on job task cancellation
- To Contractor On Quote Instruction
- To Contractor When Due Date Changed
- To User On Job Task Completion
- To User, Resource Left Task But More Work Required

**Step 3.** – Copy and Paste the **[LinkToContractorPortal]** tag into the main body of the email and click save.

Back

Save

Subject

New Job Task [Task number] from [client name] at site: [site name]

Body

Paragraph

B

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13px

A

Order Number [Task number]

From: [client name]

To: [contractor]

- Site: [site name]
- Details: [Job Details]
- Locations: [location]
- ETA: [ETA]
- Job Priority : [priority]
- Site notes: [site notes] - [contractor notes]
- Site Contact: [site contact]
- Site Phone Number: [site phone]

[LinkToContractorPortal]

Help

This email is sent to a contractor when a job or task is instructed to them. The template can be designed and customized using the editor on the left hand side.

You can place tags within the email template which will be replaced by relevant live data. The tags that can be used within the subject and body are shown below:

[job number]	The job number
[Task number]	The job task number
[Task Details]	The job task description
[Job Details]	The job description
[order number]	Order number for job
[user contact name]	The user who created this alert
[date]	The current date and time
[company name]	Your company name
[company logo]	Your company logo
[contract]	The contract name
[site name]	The name of the site
[sitecode]	The site code
[SiteAddress]	The site address
[ZipCode]	The site zip code / post code
[site contact]	The main site contact
[site phone]	The main site contact phone number
[JobContactName]	The Job Contact Name
[JobContactPhone]	The Job Contact Phone Number
[JobContactEmail]	The Job Contact Email
[location]	The location within the site
[site notes]	Any notes about the site
[priority]	The job priority
[contractor]	The contractor name
[job type]	The type of job
[jobtypedocument]	A link to the document associated to the job type
[Assets]	The list of Assets associated to job
[budget]	The budget for the instructed task
[ETA]	The estimated time of arrival for the contractor
[contractor notes]	Specific site notes for the contractor
[warning note]	Specific site warning note
[LinkToContractorPortal]	Link to job task page
[QRCode]	Display a task QR Code for the contractor.
[TransportPickupAddress]	Display the pickup details of the transport journey
[TransportDestinationAddress]	Display the destination details of the transport journey

**Step 4.** – When creating or editing a Resource/Contractor choose the correct *Email template*.

Send Email on Instruction

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Default Email Template

To Contractor on Instruction 1

To Contractor on Instruction 1

To Contractor on Instruction 2

Body

New Job Task1 [Task number]

From: [client name]

To: [contractor]

- Site: [site name]
- Details: [Job Details]
- Location: [location]
- ETA: [ETA]
- Job Priority : [priority]
- Site notes: [site notes] - [contractor notes]
- Budget for job: [budget]

[LinkToContractorPortal]

[QRCode]