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 | Res | source Address | | | | Availab | Ility 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 wel | b browser - Requires Internet Connection |
|---|--|
| Can Login ? | ● Yes 🔿 No |
| User Name | greenfinger1 |
| Password | thange 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.

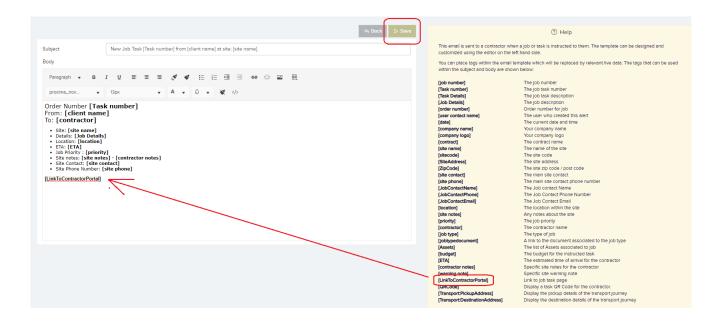
Email Templates

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'

| Jobs Job Requests Finance Job Tasks Other | |
|---|--|
| hoose 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 On Quote Instruction To Contractor When Due Date Changed To User On Job Task Completion | |

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



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

