

# Instruct a Resource on a Job

For each job you have the option to instruct a resource, or multiple resources. This will associate the job with this particular resource(s) and you also have the option to send an SMS or an Email notification. This can be done on the *Job Details* page.

From the *Job Details* tab you can decide between a single resource, or multiple. Selecting either will prompt a pop-up window for you to choose the resource(s) from:



The pop-up window allows you to select from the list of Resources/Contractors. Six helpful filter along the top help to narrow down your search.

	Name ↑	Type	Main Con...	Teams	Trades	Regions	Town	Status	Ranking
<input type="button" value="SELECT"/>	Greenfinger1	Contractor			Gardening		ppp	Pending	first
<input type="button" value="SELECT"/>	Harold Lloyd	Internal		Plumbing	Carpentry, Electrical, Plumbing, S...	France	..	Pending	first
<input type="button" value="SELECT"/>	HVAC Specialist	Contractor		In House Engineers	Carpentry, Electrical		..	Pending	first

Once you have selected the relevant resource(s), you will have the option to either *Instruct* or *Reset*:



Clicking *Reset* will allow you to choose a different resource(s). *Instruct* will prompt another pop-up window to appear on-screen. This window allows you to review and / or edit information such as the ETA and budget. You also have the option to request a quote, attach a PDF, attach a form(s), and attach a document(s):

### Instruct Resource - Step 1

Expected Start (ETA)	<input type="text" value="24/08/2021 16:16"/>
Expected Complete	<input type="text" value="24/08/2021 18:16"/>
Request for Quote	<input type="checkbox"/>
Include Worksheet (PDF)	<input type="checkbox"/>
Budget	<input type="text" value="200.00"/>
Attach Forms to Task (1)	∨ Choose Forms
Attach Documents to Task (0)	∨ Choose Documents

For example, a risk assessment form may be attached in the pop-up window shown above. This risk assessment form may then be completed by the resource either in the Resource App or in the main application.

Step 2 is where you can review the contact information, and choose whether you would like to send an SMS or an Email (or both) to the selected resource(s):

You can also 'Enable QR Code' at this step. This will generate a unique QR code for that task and will be sent with the email. This QR code can then be scanned when the Contractor arrives and leaves the site, starting and ending the task.

**Instruct Resource - Step 2** ✕

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Send Email 
Send SMS 
Enable QR Code

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Mobile

+44

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To

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CC

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Subject

New Job Task [Task number] from Demo at site: Airport.

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Body

**B** *I* U ☞ ↺ **A** ▼ 🔗 ▼

Order Number [**Task number**]  
 From: **Demo**  
 To:

- Site:
- Details: **test 16:16**
- Location: -
- ETA: **24/08/2021 16:16**
- Job Priority : **Urgent**
- Site notes:
- Site Contact:
- Site Phone Number: ...

✕ Cancel
> Instruct

When you are ready to instruct the selected resource(s) select *Instruct* (as in the above screenshot) and you will be asked to confirm your decision:

**Instruct Resource - Final Step** ✕

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Are you sure you want to create this instruction?

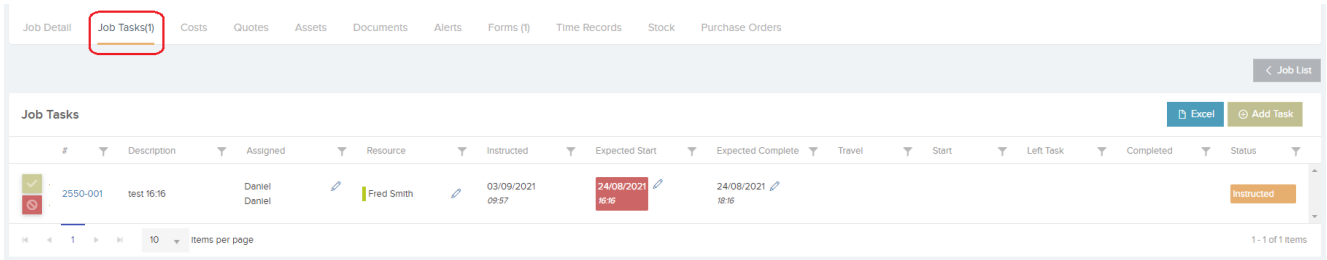
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✕ Cancel
🔄 Confirm

The instructed resource will be displayed on the *Job Details* tab. You have the option to *Re-Allocate* the job to another resource(s) if you wish to change this. There is also a wrench icon that appears alongside the *Resource section*. This icon will prompt a pop-up window displaying other jobs for the selected resource with an expected date near to this particular job:



Once a resource has been instructed, a job task will be created for that specific job. This can be seen on the *Job Tasks* tab of the *Job Details* view:



The screenshot shows the 'Job Tasks' tab selected in the 'Job Details' view. The 'Job Tasks' tab is highlighted with a red box. The table below shows a single job task with the following details:

#	Description	Assigned	Resource	Instructed	Expected Start	Expected Complete	Travel	Start	Left Task	Completed	Status
2550-001	test 16:16	Daniel Daniel	Fred Smith	03/09/2021 09:57	24/08/2021 16:16	24/08/2021 18:16					Instructed

At the bottom of the table, there is a pagination control showing '1' of 10 items per page and '1 - 1 of 1 items'.