

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.

Select Resource

Trades

Team

Resource Type

Regions

Ranking

Availability Status

<Select>

<Teams>

<Select>

<Select>

<Select>

<Select>

	Name	Type	Main Con...	Teams	Trades	Regions	Town	Status	Ranking
<div>SELECT</div>	<div></div> Greenfinger1	Contractor			Gardening		ppp	Pending	first
<div>SELECT</div>	<div></div> Harold Lloyd	Internal		Plumbing	Carpentry, Electrical, Plumbing, S...	France	..	Pending	first
<div>SELECT</div>	<div></div> 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)

24/08/2021 16:16

Expected Complete

24/08/2021 18:16

Request for Quote

☐

Include Worksheet (PDF)

☐

Budget

200.00

Attach Forms to Task (1)

▼ Choose Forms

Attach Documents to Task (0)

▼ Choose Documents

⊙ Cancel

> Next Step

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

Send Email

Send SMS

Enable QR Code

Mobile

+44

To

CC

Subject

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

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

Are you sure you want to create this instruction?

⌛ 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:

Job Detail

Job Tasks(1)

Costs

Quotes

Assets

Documents

Alerts

Forms (1)

Time Records

Stock

Purchase Orders

< Job List

Job Tasks

Excel

Add Task

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

1

10

items per page

1 - 1 of 1 items