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:

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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.

frades <select></select>	<pre>Team </pre>		source Type	Regions <select> *</select>		ailability Status Select>			
	Name †	Туре	Main Con 🍸	Teams	Trades	Regions	Town T	Status T	Ranking
SELECT	Legenfinger1	Contractor			Gardening		ppp	Pending	first
SELECT	Lioyd	Internal		Plumbing	Carpentry, Electrical, Plumbing, S	France		Pending	first
SELECT	LHVAC 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*:

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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)	\checkmark Choose Forms		
Attach Documents to Task (0)	\checkmark Choose Documents	1	
			⊗ Cancel > Next Step

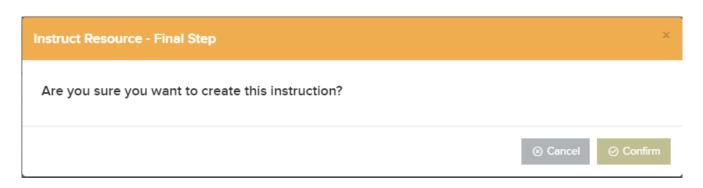
For example, a risk assessment form may be attached in the pop-up window shown above. This risk assessment form may then be completed by the resource either in the Resource App or in the main application.

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			
То				
сс				
Subject	New Job Task [Task numb	er] from Demo at site	: Airport.	
Body	B I U ↔ ↔ Order Number [Task From: Demo To: • Site: • Details: test 16:16 • Location: - • ETA: 24/08/2021 16 • Job Priority : Urgent • Site notes: • Site Contact: • Site Phone Number:	a number] :16		
			⊗ Cancel > In	struct

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:



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:

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Job De	etail Job	Tasks(1)	Costs	Quotes	Assets	Documents	Alerts	Forms (1)	Time R	ecords Sto	:k	Purchase Orders										
	_																				<	(Job List
Job Ta	asks																			🗅 Excel	⊕ Add	Task
	# <u>T</u>	Description	T	Assigned	T	Resource	T	Instructed	T	Expected Start	T	Expected Complete 🛛 🍸	Travel	T	Start	T	Left Task	T	Completed	T	Status	T
 Ø 	2550-001	test 16:16		Daniel Daniel	0	Fred Smith	0	03/09/2021 <i>09:57</i>		24/08/2021 🖉 15:16		24/08/2021 🖉 18:16									Instructed	
			, Items per p																			of 1 Items