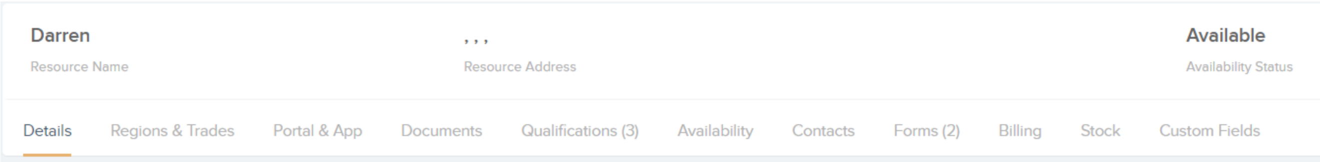
Resource Details

The *Resources Details* area allows you to view and manage all relevant resource information:



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1. The Resource Details tab allows you to view / edit the basic resource information such as their name, address, contact information, start date, salary, team, and resource type, as well as configure email notifications, job reminders, and budget / contract information.

From the *Details* tab you can select the *Edit* button on the right-hand side to edit the existing information (or *Delete* in order to delete the resource from the main application):

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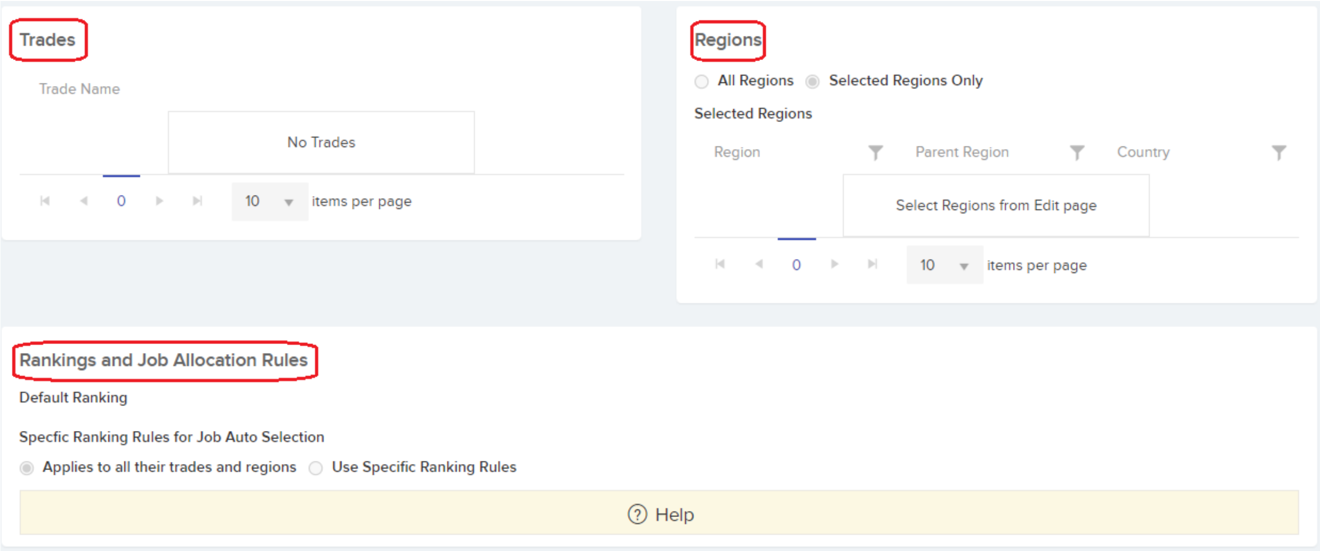
2. The Regions & Trades tab allows you assign different trades to that Recourse, different Regions to that Resource and set Ranking and Job Allocation Rules.



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3. The Portal and App tab allows you to set this resource up as a Resource App user, and configure settings for this resource on both the main application as well as the Resource App.

The Online Portal Settings refer to the main application and allow you to configure settings such as:

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

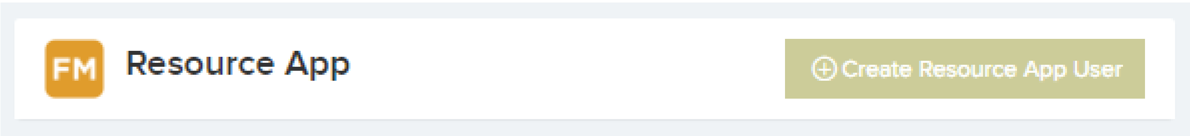
The Resource App Settings allow you to configure settings such as:

- If the resource must accept a job task.
- Ability to log travel time. This allows a resource to

log when they start travel, start the task, leave the task, and travel home. **Note**: that location (GPS) stamps are taken and recorded at the time a resource logs each of these.

- Ability to add expenses to a job task with a photo attached.
- Ability to manage and submit weekly time sheets.
- Turn on or off app notifications for the resource.

For resources not set up as a Resource App User, you will see the option to *Create Resource App User:*



Selecting this will display a pop-up window for you to create a password for the resource to use in order to login to the Resource App.

The Settings Common to the Online Portal and Resource App section shows settings that can be applied to the resource on both the main application and the 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.

The Job / Requests Settings Common to the Online Portal and Resource App section shows more settings that can be applied to the resource on both the main application and the Resource App, focusing on jobs and requests:

- **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.

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4. The Documents tab displays any documents associated with this resource.

You can upload a new document for this resource or filter by tags.

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5. The Qualifications tab allows you to view and edit qualifications for this resource.

Select *Edit* at the right side of the page, and you can now update relevant qualifications for this resource by adding the expiry date and whether the qualification has been validated.

You also have the option to *Block Instruction if no Validated*. Select yes if you wish to enable this option.

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6. The Availability tab allows you to set periods for when the resource may be unavailable, for example; holidays, training courses, appointments etc. These availability settings will also appear on the calendar in the *Resource* view.

If a resource is instructed during a time they are set to be unavailable, a warning note will be displayed on the Availability tab.

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7. The Contacts tab allows you to view and manage contact information for a particular resource.

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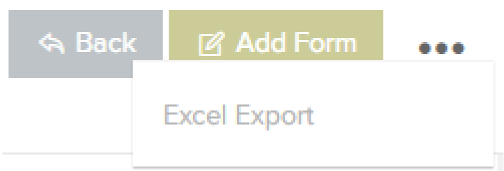
8. The Forms tab allows you to view, manage, and edit all forms associated with this resource. The forms grid shows the form name, when it was created, if a form contains a failed field, form submit status, date and time of submission, and who the form was submitted by.

From here you can also *Add Form* or export the form list as an Excel sheet as shown below:

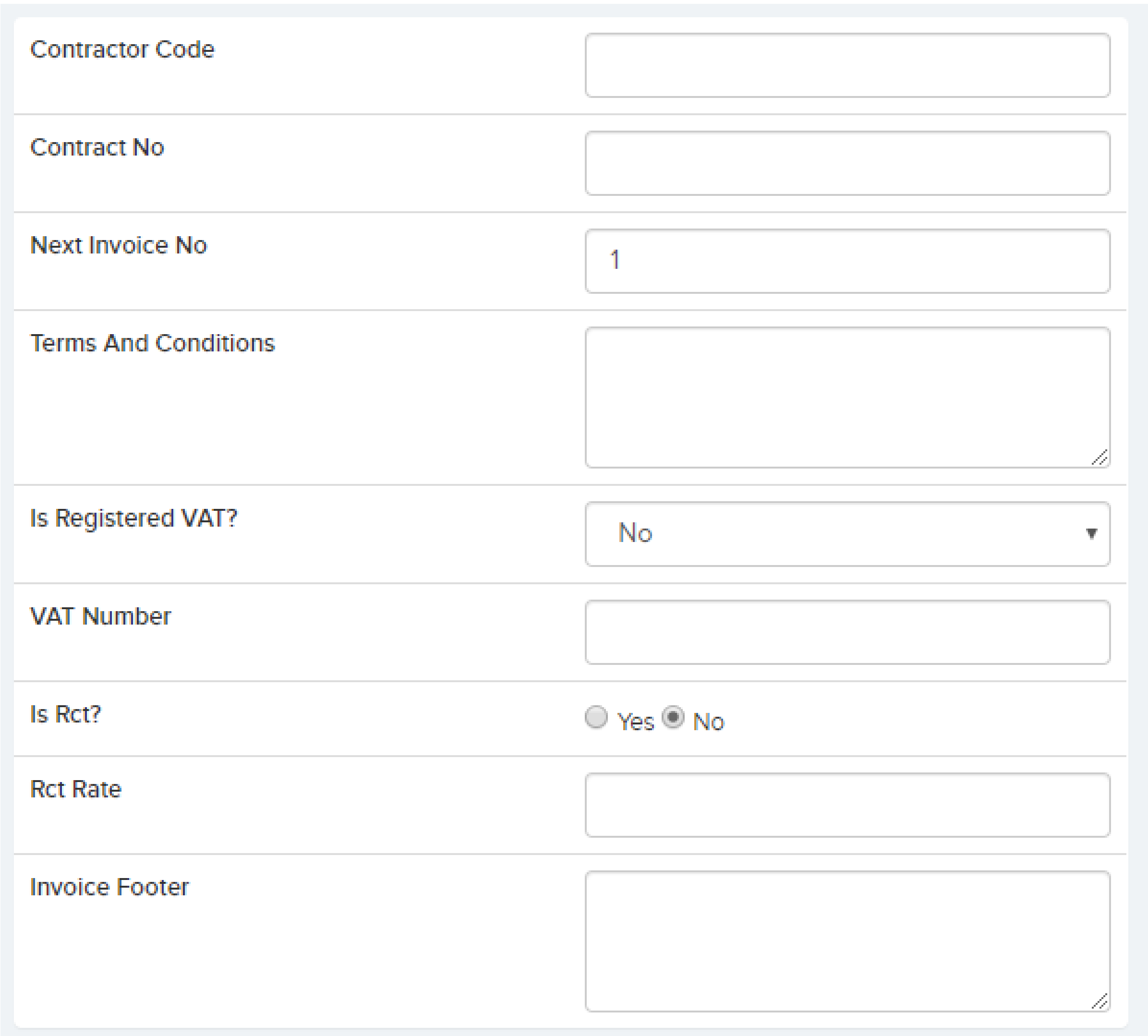


9. The Billing tab allows you to view and edit the billing information for this resource.

The Auto Contractor Billing section allows you to decide whether or not you would like to create contractor invoices periodically from the costs associated to the respective instructed jobs. Enabling this option for a particular resource means that you will be able to receive invoices from this contractor in the *Finance* area.

Contact support@trackplanfm.com for more information

You can also configure other settings such as:



10. The Stock tab shows stock held by this resource. You can add stock by selecting *Add Stock Level* at the top-left of the grid, and then choosing the stock you wish to add. Once the stock level has been added, you can then adjust the stock levels by clicking on the pencil icon in the *Stock Level Value* column.

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11. The Custom Fields tab allows you to view and edit any Resource Custom Field Forms associated to that Resource