Resource Details

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

---

1. The Resource Details tab allows you to view / edit the basic resource information such as their name, address, contact information, team, and resource type. You can also view their KPI information and cost summary.

2. General Settings – Here we can set and update information like, working hours, set customised messages, email template settings, job reminders and reports.

---

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

---

4. The Online Portal tab allows you to set this resource up on the Contractor portal and set their permissions.

---

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

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

---

6. 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.

---

7. 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.

---

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

---

9. 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:

---

10. 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:

---

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