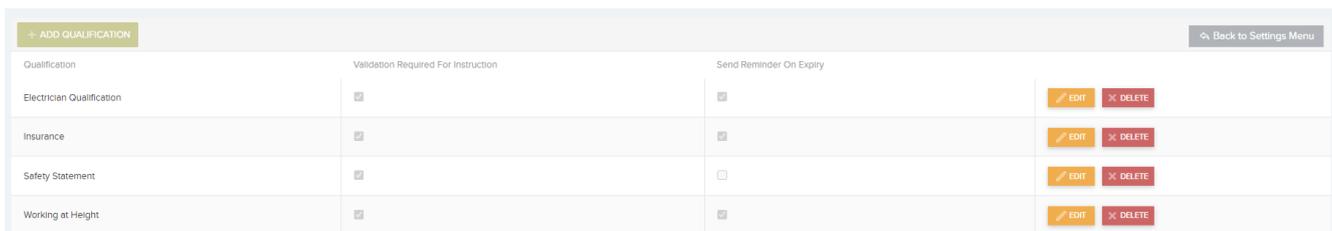


Resource Qualifications

In Settings → *Resource Qualifications* you can create new Qualifications that can be used to manage and vet your contractors' capability and qualifications.

To set up a qualification select the *Add Qualification* button at the top-left of the page:



Qualification	Validation Required For Instruction	Send Reminder On Expiry	
Electrician Qualification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EDIT DELETE
Insurance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EDIT DELETE
Safety Statement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT DELETE
Working at Height	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EDIT DELETE

This creates a row in the qualifications list where you can

- Name the qualification
- Set **Validation Required For Instruction** which will prevent jobs and tasks being instructed to the contractor. On the resource detail page, you can update whether the contractor has been validated or not which will determine whether they can be instructed.
- Set **Send Reminder On Expiry** which will notify nominated Users within 24 hours of the qualification expiring and every 2 days until the qualification date for that resource is updated .

Once you have finished inputting the Qualification information, select *Update* to save the new Qualification and add it to the list.

You can also *Edit* and / or *Delete* the *Qualification* information once it has been added to the list.

After setting up the Qualifications in the settings area you can now go to the Resource Details page and click on the 'Qualifications' Tab.

Contractor 1				Available	Pending
Resource Name		Resource Address		Availability Status	Compliance Status
Details	Regions & Trades	Portal & App	Documents	Qualifications (2)	Availability
				Contacts	Forms
				Billing	Stock
					Custom Fields

From there you can view all the qualifications and set the Expiry Date and whether or not the Resource is validated.

Qualifications		
Qualification Name	Expiry Date	Validated
Insurance	31/12/2021	<input checked="" type="checkbox"/>
Safety Statement		<input type="checkbox"/>
		EDIT
		EDIT

Next step is to nominate Users to receive the email notifications. This can be done in Settings → Users → User Details → Email & Notification Settings.

User Details		General Settings	Email & Notification Settings	Manager App	Request App
← Back ✎ Edit					
Job/Task Email Settings			Resource Email Settings		
Receive Email When Job Assigned To This User or User's Team	Yes	Receive Email When A Resource Leaves Task	Never		
Receive email when job is completed	Jobs Created by the User	Receive Email When Time Sheet is Submitted By Resource	No		
Receive Email When Job is Approved	No	Receive Reminder When Resource / Contractor Qualification Expires	Yes		
Receive Email When Planned Job Overdue and the Assigned User for the job	Yes	Receive Notification When Resource Adds Note Or Document to a job task, and this user is the assigned user.	No		
Receive Email and Notification On Key Job and Task Events	No	? Help			
? Help			? Help		