Resources Overview

Contractors and internal engineers can be manually entered through the *Resources* area. Contractors can be given access to view, manage and complete their instructed jobs in the contractor portal. They can also create quotes, enter costs, upload documents, add job notes, and take photos.

Resources can be chosen, and then instructed, for jobs that have been created.

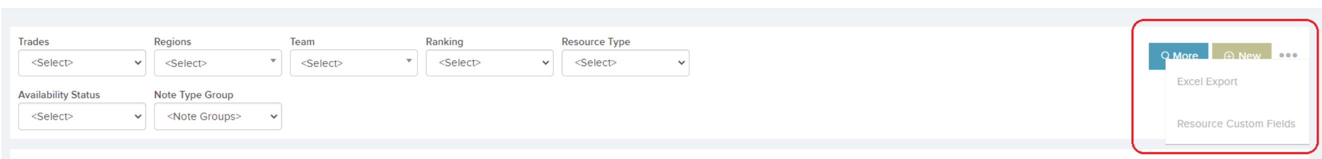
There is also a *Resource App* available for contractors and engineers where they can view and manage instructed jobs on a mobile device such as Android or iPhone.

The *Resource List* allows you to view, manage, and add new resources to the main application.

You can sort the *Resources* list by selecting a column heading. You can also customise the grid by adding / removing columns. Simply select the three dots next to Resource Name. Under Columns you will be able to choose which columns you'd like to display:

Filters are available to refine your search and 2 additions features via the triple dot button:

- **Excel Export** – this allows you to export the list as an Excel sheet.
- **Resource Custom Fields** – Set up Custom Field Forms here

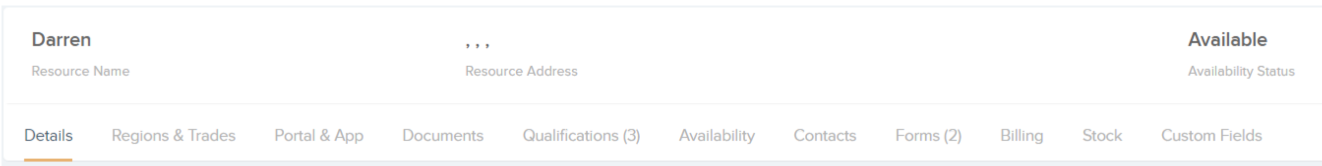


To create a new resource, select the ***New*** button in the top right corner.

This brings you to a page where you can populate the information for the new resource; such as name, address, and contact information, as well as start date, salary, resource type, teams. You can also configure settings for email notifications, and job reminders.

Save to add to the Resource List.

If you select a resource on the list, you are brought to a page outlining the *Resource Details*. Here you can view and manage various settings for that resource, such as contact details, Resource App settings, qualifications, availability, and more:



In the *Portal & App* tab, you can set various settings and permissions for that particular resource, and set them up as a Resource App user:

You can also upload your resources to the main application using an Excel file in the *Upload Centre*.