

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

The screenshot shows the top of the Resource List interface. It features a row of five dropdown filters: Trades, Regions, Team, Ranking, and Resource Type, each with a '<Select>' placeholder. Below these are two more filters: Availability Status and Note Type Group. To the right of the filters is a menu icon (three dots) which, when clicked, opens a dropdown menu. This menu is highlighted with a red rectangle and contains three options: 'More' (with a magnifying glass icon), 'Excel Export' (with a document icon), and 'Resource Custom Fields' (with a gear icon).

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:

Darren	...	Available
Resource Name	Resource Address	Availability Status
Details	Regions & Trades	Portal & App
Documents	Qualifications (3)	Availability
Contacts	Forms (2)	Billing
Stock	Custom Fields	

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*.

