Job Tracker Professional

Assign Enginer Feature

JOBTRACKER

With the new enhanced assign engineer feature, when assigning engineers, you can see from a glance all relevant details such as – Comments regarding their service and costs, their skills & qualifications and now you can assign and view a star rating which is both visual and informative. You can select subcontractors or engineers that are based in the area of the work or alternatively select those that cover a specific geographical area.



Set Congestion / Surcharges



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In order to add Comments, Ratings, Covered areas and Skills & Qualifications to your Engineers/Staff/Sub Contractors, open Job Tracker Professional and Click on 'Staff Members' that is displayed at the top of the home screen.

Within the new screen, your Staff members/Engineers/Sub contractors will be displayed on the left-hand side of the screen. Double click on their name in order to edit the information displayed. At the top right-hand side of the screen you will see 'Skills and Qualifications'. From the list below this you will be able to tick the boxes for the relevant skills.

Within the assign engineer screen, you are able to filter the results based on the Skills/Qulifications that are needed for a Job.

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Trevor Marshall	Mobile: TXT	
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The new version 4 assign engineer screen will be displayed when you click the 'Assign' button located under the 'Assigned staff' section in the middle of the 'Jobs' screen or 'Quotes / Estimates' screen. Within this new assign engineer screen, you can apply various filters to help you find the relevant resources. If you simply click search, the list will display all engineers/subcontractors that you have detailed in your Staff Members/Engineers section.

There are 2 ways in which you can search for an engineer by Post Code.

Write in the Post code of the Job into the 'Post code' field and click search Job Tracker will then compare this Post code to the one on the Engineers/ Subcontractors contact information. Filtering the restults to show any that have a registered address located in that area.

Tick the 'Covers Post Code Area' box, this will compare the post code of the Job to post codes that were entereted into the 'areas_covered' field on the staff members screen. Filtering the results to show any that match.

 The Engineer/ Subcontractor Rating will be displayed in the column on the right of the screen and will be between 0-10 stars.

In addition to this you are also able to filter for an engineer based on their skill set. This is done from the 'Available skills' section displayed on the right-hand side of the screen. From this section, you can tick the desired skills needed . I.e.: Plumber. The Results will change accordingly.

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2	Filter Settings										-	0	×
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 Double click on the name of the engineer in the results to select them.
Any engineers that you have selected for the Job will display in the 'Selected Engineers' section on the left-hand side of the page. The 'Comments' section will display any comments that were previously made about the Engineer/Subcontracter on the 'Staff Members' screen. I.e - No call out fee.

Once you have selected the engineer you would like to assign, click on the 'Assign Selected Personnel' button located in the top middle of the page.



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