

# Job Tracker Professional

## Assign Engineer Feature

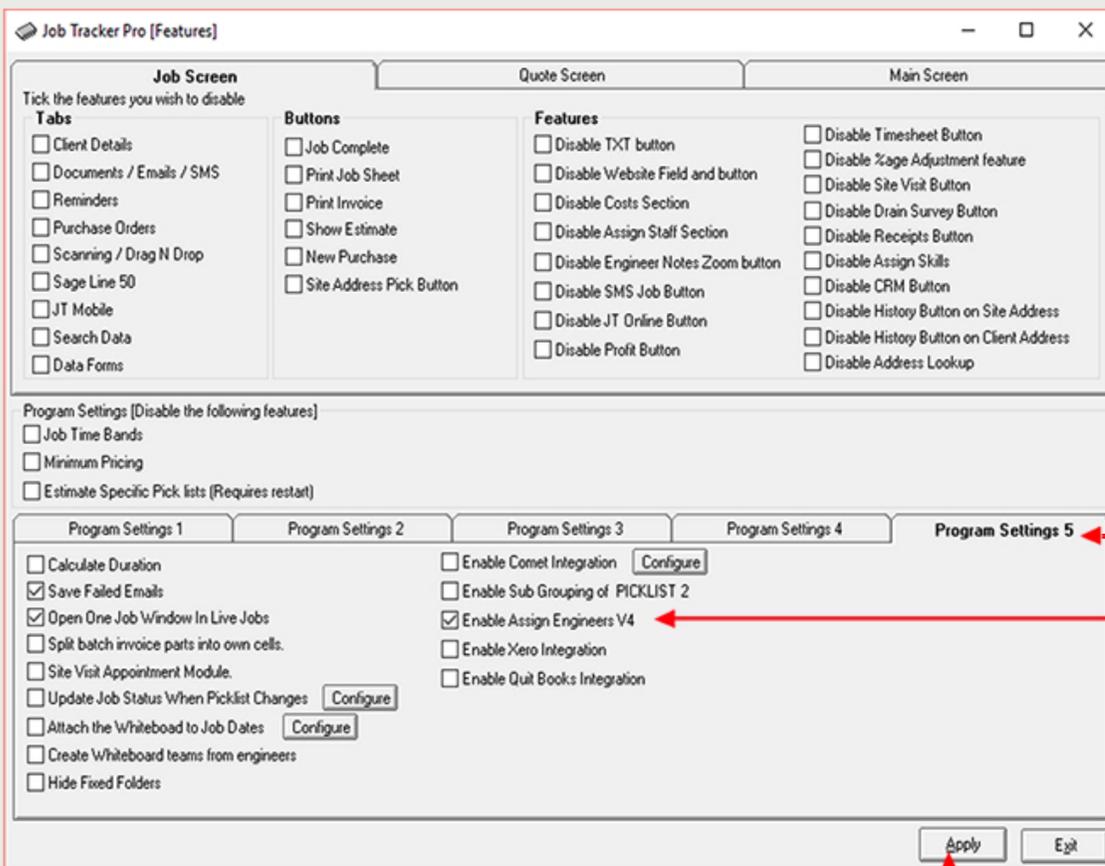
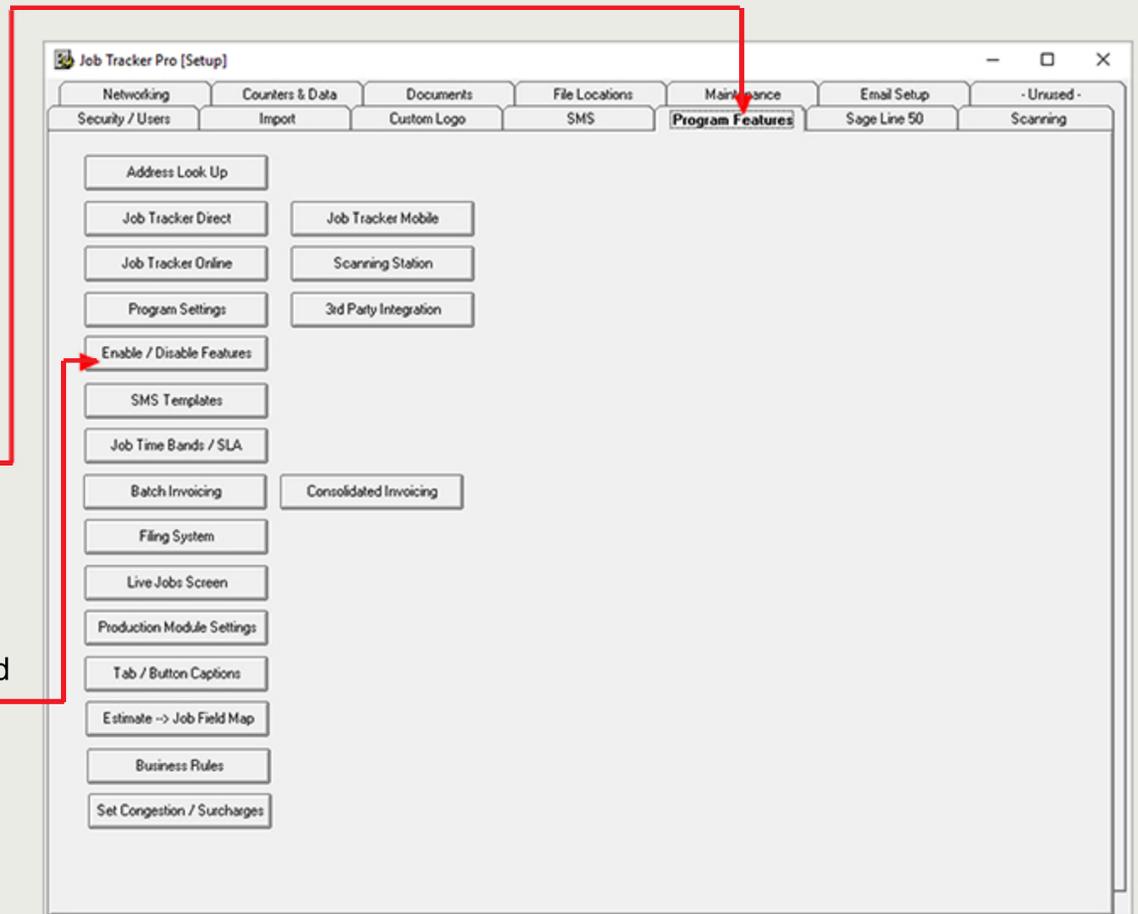


With the new enhanced assign engineer feature, when assigning engineers, you can see from a glance all relevant details such as – Comments regarding their service and costs, their skills & qualifications and now you can assign and view a star rating which is both visual and informative. You can select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

In order to load the new layout for the Feature, open Job Tracker and click on 'Control Panel'.

Click on the 'Program Features Tab' at the top of the screen.

Click on the 'Enable/Disable Features' button displayed on the left hand side of the screen.



Proceed to the click on the 'Program Setting 5' tab at the bottom on the screen.

Tick the 'Enable Assign Engineers V4' box and then click the 'Apply' button in the bottom right of the screen.



# Job Tracker Professional

## Assign Engineer



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/Qualifications that are needed for a Job.

Days	From	To	Hourly Rates £ Pay	Hire Out	Travel Rates £ Per Mile Per Hr
<input checked="" type="checkbox"/> Mon	09:00	17:00	20	35	0 0
<input checked="" type="checkbox"/> Tue	09:00	17:00	20	35	0 0
<input checked="" type="checkbox"/> Wed	09:00	17:00	20	35	0 0
<input checked="" type="checkbox"/> Thu	09:00	17:00	20	35	0 0
<input checked="" type="checkbox"/> Fri	09:00	17:00	20	35	0 0
<input type="checkbox"/> Sat	09:00	17:00	20	35	0 0
<input type="checkbox"/> Sun	09:00	17:00	20	35	0 0

Towards the bottom of the screen, there is an 'Areas Covered' field to capture details of postcodes the Engineer/Subcontractor covers. Within this field enter the first two to four characters of a post code followed by a comma.

To the right of the 'Areas Covered' field you will see a rating bar. You are able to pull the bar left or right to give them a rating between 0 and 10 stars.

At the bottom of the screen there is a 'Comments' field, to capture any comments that are useful or relevant. To help you make informed decisions when assigning personelle to jobs.

I.e.: No Call out Fee – Reliable – Fast work.

Click the 'Save' button displayed in the bottom left of the screen to save all changes that were made.



# Job Tracker Professional

## Assign Engineer



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 results 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 entered 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.

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/Subcontractor 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.

