RYAN ELECTRICAL SERVICES

RES Portal Help

Notes

- A job classed as 'Open' has a status of either 'Tasked', 'Awaiting Quote', 'Quote Submitted', 'Quote Accepted' or 'Servicing'.

- An 'Outstanding' priority highlights a collection of jobs that have a priority of 'Store Not Trading', 'Affecting Trade' or 'Store Break In'.

Job Grid Key

- Jobs highlighted in this colour indicate that the job is 'Open' and does not have a contractor selected.

- Jobs highlighted in this colour indicate that the job is 'Open', has a priority of either 'Store Not Trading' or 'Affecting Trade' and it was added to the system (created date) more than 4 hours ago.

- Jobs highlighted in this colour indicate that the job is 'Open' and the contactor attending date is more than 2 days old. (No longer shown for jobs added after 29/09/14)

RES Division Rules

When adding a job an alert will be displayed if the user selects the wrong trade skill for the given RES division. Below is a list of the 'correct' trade skills for each RES division:

- 'RES Air' division – 'air con' trade skill.

- 'RES Lifts' division – 'lifts' or 'escalators' trade skill.

- 'RES' division – All other trade skills.

Priority / Job Status selection rules

- The priority 'Store Trading' can only be selected during a job update if the previous priority was 'Store Not Trading'.

- The priorities 'Store Not Trading' or 'Affecting Trade' can only be selected if the job status is 'Tasked'.

- The job status 'Invoiced' can only be selected during a job update if the previous status was 'Complete'.

Communication Procedures

- An email will be sent to the contractor 'operations' email address when a contractor has been selected for a job.

- A reminder email will be sent to selected RES Admin at midnight on the selected reminder date (this is set on the contractor tab when adding a job).

- An email will be sent to selected RES Admin when a job is classed as overdue (dependant on the selected job priority*****) – number of hours calculated from the time that the 'Confirm' button is clicked.

- An SMS is sent to Client and RES user for when a job is prioritised as 'Store Not Trading', depending on SMS configuration by administrator. The client will also receive this as an email.

- An SMS is sent to Client and RES users when the notes of this job are updated. The client will also receive this as an email.

- An SMS is sent to Client and RES users for when the job is prioritised as 'Store Trading'. The client will also receive this as an email.

* 2hrs: 'Store Not Trading' or 'Store Break In' / 4hrs: 'Affecting Trade' or 'Security' or 'Health and Safety' / 24hrs: 'Routine'

User Rules

Functionalities	RES Administrator	RES User	Call Out	Client
Administration Area	✓	✗	✗	✗
Export to Excel	✓	✓	✓	✗
Print a job revision	✓	✓	✗	✗
Select a job status of 'Complete'	✓	✓	✗	✗
View the communication log for a job	✓	✓	✗	✗
Visible highlighting of jobs	✓	✓	✓	✗
Contractor details	✓	✓	✓	✗
Directory access	✓	✓	✓	✗
Change Password	✓	✓	✓	✗