## Internal Resources

💾 Wed, Jan 17, 2024 🛛 🖿 Viewing/Editing a Resource

To view/edit an Internal Resource, click "Resource List" and open a Resource that says "Internal" in the Resource Type column by either double clicking it or selecting the Resource and clicking "Next".

1. This is the Internal Resource - Detail Tab. All the different information concerning the Resource is displayed here such as the Resource Name, the Clients the Resource performs work for and the Work Order Types the Resource does work for. The status of the Resource is displayed at the top alongside the Name of the Resource. It is possible to edit all fields within this screen apart from the Resource Number field as this is system generated. Click "Next" to proceed.

Resource Information	Deactivate Set On-Hold Edit Accounts Code Edit	Further Information	Edit	đ
Category	Internal (Tier 1)	Types Of Work Order	All	
Status	Active	Work Order Types	BUILDING FABRICATION	sign
Resource Number	INT113 ()		DOORS SHUTTERS	nent/
Resource Name	Internal Maintenance Team	Grouping	ELEC INICAL *	Acce
Resource Type	Internal	Contraction Zerose		otanc
Timezone	(UTC) Dublin, Edinburgh, Lisbon, London	Contractor Zones		1 Z
Clients	Ostara Demo			otes/
		Internal Owner		Pre-
	· · · · · · · · · · · · · · · · · · ·	External Owner		ualifi
		Recall Warranty Period (days)		catio
		Can Sub-Contract?	No	D D
		Performance Review Date	Rates Review Date 31/12/2014	ddres
		Website URL		1
		Mobile Honeymoon End Date		ontac
		Zero Accrual On Stop	No	8
				1.
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2. The next tab is the "Assignment/Acceptance" Tab. From here you can set the automations of Assignment and Acceptance for the Resource. Defaults are set to Automatically Assign, and Automatically Accept, with an automated Email as the notification on assignment, but these defaults can be changed as below:

Reactive (In Hours)	Edit	Reactive (Out Of Hours)		Edit	Detai
Assignment Type	Automatic	Assignment Type	Manual		
Assignment Notification Type	Email	Assignment Notification Type	Phone		signa
Acceptance Type	Manual	Acceptance Type	Manual		nent/
Quote (In Hours)	Edit	Quote (Out Of Hours)		Edit	Accep
Assignment Type	Manual	Assignment Type	Manual		tance
Assignment Notification Type	Phone	Assignment Notification Type	Phone		Z
Acceptance Type	Manual	Acceptance Type	Manual		otes/F
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					Jalific
					ation
					Add
					ress
					G
					tacts

3. The next tab is the Notes/Pre-Qualification screen:

Notes	tes Edit Notes Edit Finance Notes					
Notes						
Finance Notes						11
Pre-Qualification				Add Remainin	g Clients Add Edit	it
Client	Use Documents?	Source	Reference	Notes	Active	Ĩ.
Filter	Filter	Filter	Filter	Filter	Filter	
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- 4. The next tab is the Address Tab. Here, it is possible to see the different addresses that have been recorded for the Resource. To switch between addresses, click the Address Type drop down and select one of the option from the list. These options will be "Primary", "Invoice" and "Helpdesk". All of these addresses can be modified in this screen if needed. Click "Next" to proceed.
- 5. The last tab displays the Resource Contacts. A list of all the contacts that are associated to the Resource can be seen and opened to view them in more detail from this page. Each contact will be shown with a Contact Name, Job Title, Type, the state the contact is in at present (Active or Inactive) and the Login Type of the contact. Editing Resource Contacts must be carried out via the People List function in Core Data rather than directly against the Resource record.

When ready, click "Close" to close the Resource page.

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