Pre-Qualification

💾 Wed, Jan 17, 2024 🛛 🖿 Resources

Should Pre-Qualification be enabled for the system, administration of Pre-Qualification will be required. This can be done by clicking the "Pre-Qualification" button.

> 1. Clicking the "Pre-Qualification" button, displays the Resource PQQ Exclusions screen. Here, a list of all the current Resources that have PQQ Records are shown and it's possible to add new ones to the list.

Resource PQQ Exclusions							
	Exclusions	Add E	Edit				
	Contractor	Valid To	Deleted?				
	Filter	Filter					
	21st Century Lifts Ltd	10/12/2012					
	21st Century Lifts Ltd	19/07/2012					
	365 ODS Ltd	19/07/2012					
	365 On Demand Solutions Ltd	19/07/2012					
	3C Asset Management Ltd	10/12/2012					
	3C Asset Management Ltd	19/07/2012					
	3E Consulting Engineers Ltd	06/01/2013					
	4 Forces Security Ltd	19/07/2012					
	4C Developments Ltd	19/07/2012					
	5M (UK) Ltd	19/07/2012					
	A & A Electrical Distributors Ltd	19/07/2012					
	A & B INDUSTRIAL CLEANING LIMITED						
	A ANDREWS & SONS MARBLES & TILES LTD	08/01/2013					
	A J BAYLISS PETROLEUM ENG LTD	30/06/2013		-			
			OK Cancel				

- 2. After clicking "Add", choose a Client from the list. For information on how to select a Client, see the Client Selection page.
- 3. Next, the Select Resource(s) screen is displayed. Provide a Source and Reference to define the exclusion and an Exclusion Valid To date to state how long the exclusion will last and then select the Resource to exclude. The User can enter any notes regarding the exclusion in the Notes field. If the requirement exists in the system, the Resource will also need to provide certificate as proof of their Pre-Qualification. This can be done ticking the "Use Pre-Qualification Documents" and adding the documents from here. It is actually possible to set more than one Resource as PQQ excluded, just tick the appropriate Resource(s) from the list and click "OK" to add them.

Select Resource(s)										
		Source								
Reference										
Exclusion Valid To			Use P	re-Qualification Do	cuments					
Neter										
		notes								
	Bulk Select Select All Clear All Select All Filter Clear All Filter Select Not Filtered									
		Name		Number	Town	Internal/External	^			
		Filter		Filter	Filter	Filter				
		AKOR BOUW BV		AKO100	Rijssen	External HO				
	Cardinal Shopfitting & Systems			CAR101	Shipley	External HO				
		Cullen Cleaning Li	imited (Europe)	CUL101	Dublin	External HO				
		Standard Control	Systems	STA100	Dublin	External HO				
		Store Developmen	t	STO101	Store Development	External HO				
		EFG		EFG100	Haydock	External HO				
		WIDD Signs		WID102	Leeds	Evternal HO	×			
	`					,	-			
13 available items, 13 filtered items, 0 selected items										
						OK Cancel				

- 4. To edit a Resource exclusion, click "Edit" after selecting the Resource and enter the new details in the respective fields that appears. To delete a Resource from the PQQ Exclusion List, tick the box in the column "Deleted?" against the Resource that is to be removed.
- 5. Once all the necessary changes have been made, click "OK" to apply them.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=148