Contents

Registration in the System

Using Contractors.es is possible after creating an account in the system by an administrator or company owner. This process begins with filling in basic information in the steps of a simple configuration process, the detailed description of which is available here. Registration in the system is a quick start that will take the user literally a moment.

> **REMEMBER:** Contractors.es is an advanced system, dedicated primarily to facilitating control and supervision over processes related to project implementation in your company.

Account Creation

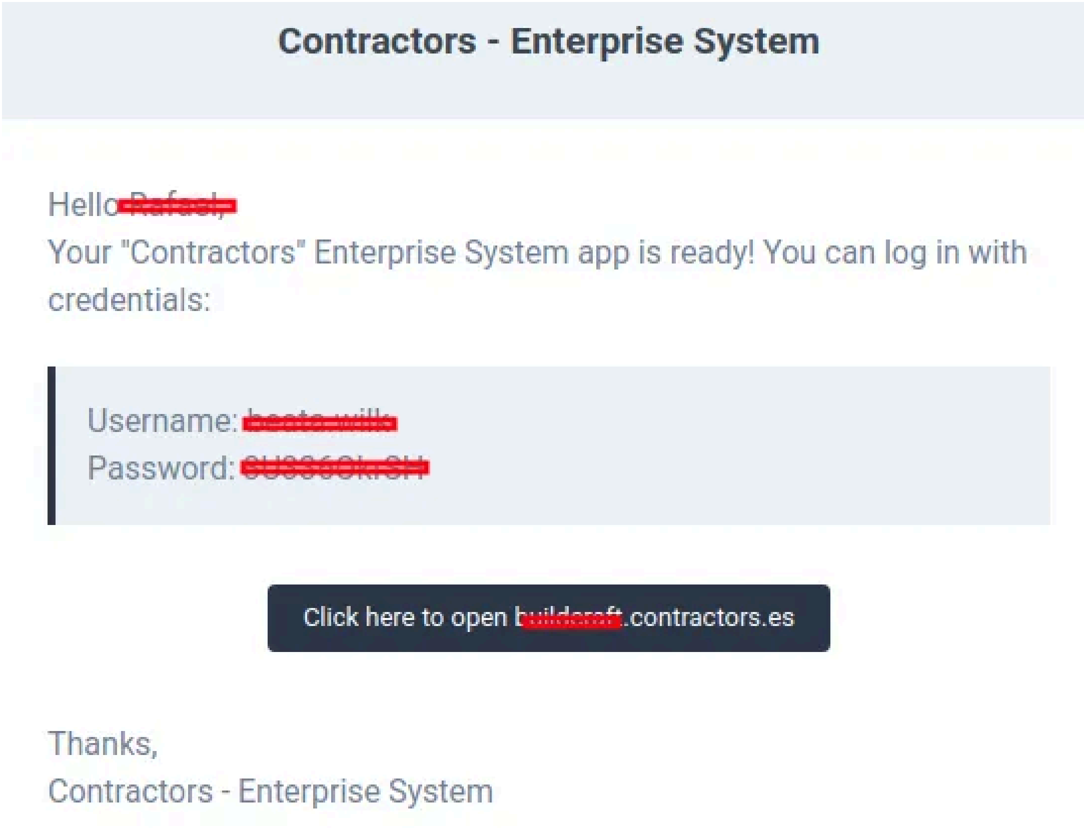
1. Go to the yellow registration field on the page https://contractors.es/ and use the link available there to create an account in Contractors.es.

2. Fill in the registration form by providing the necessary basic information.

> **NOTE:** The Discount Code field applies only to current promotional campaigns.

3. After filling out the form, accept the terms and conditions and the privacy policy, and then confirm the creation of the account by clicking the button:

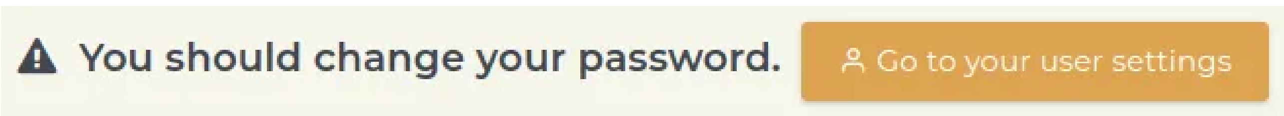
4. You will receive a return message to the email address provided during registration confirming the creation of the account and the generated password for the first login.



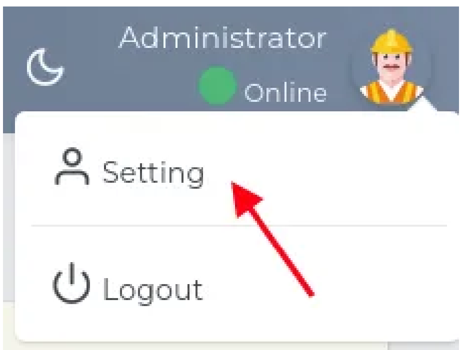
> **REMEMBER:** At the time of the first login, you will be redirected to a simplified system configuration, the filling scheme of which has been described here.

Password Change

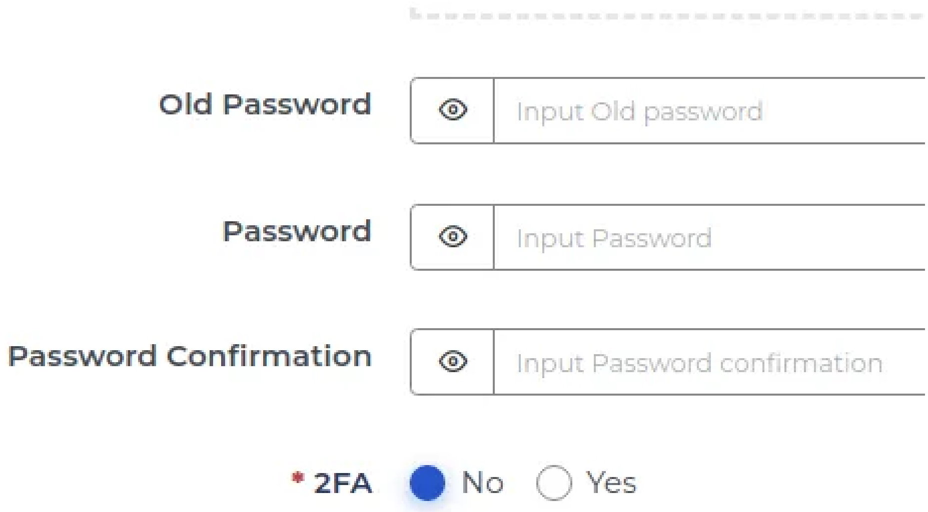
1. After completing the system configuration process (section: First Steps with the System), go to the user icon in the upper right corner of the screen.



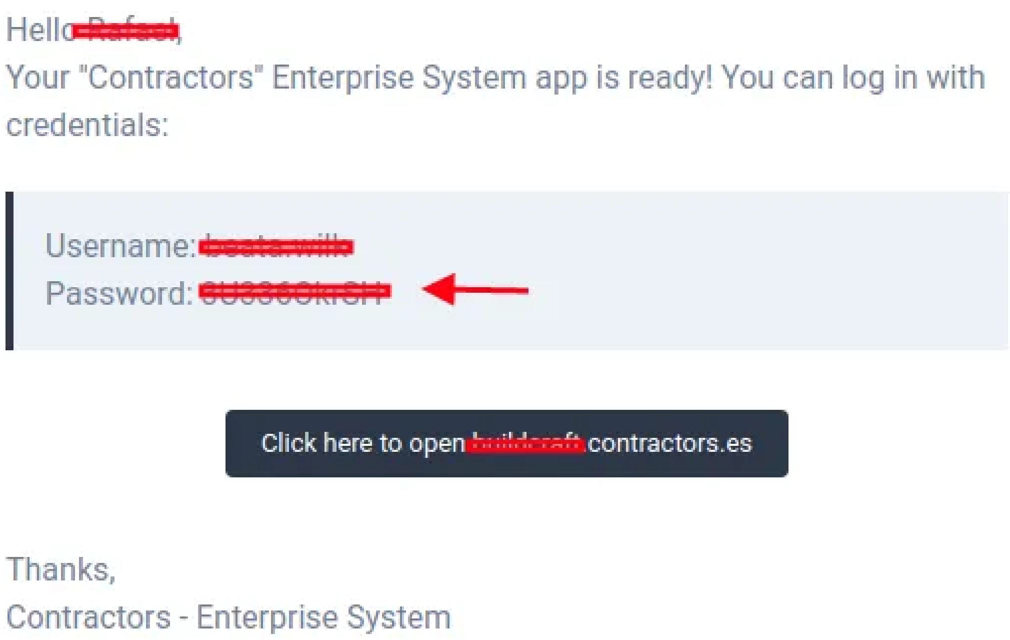
2. Select the “Settings” tab.



3. Fill in all the required fields in the form.

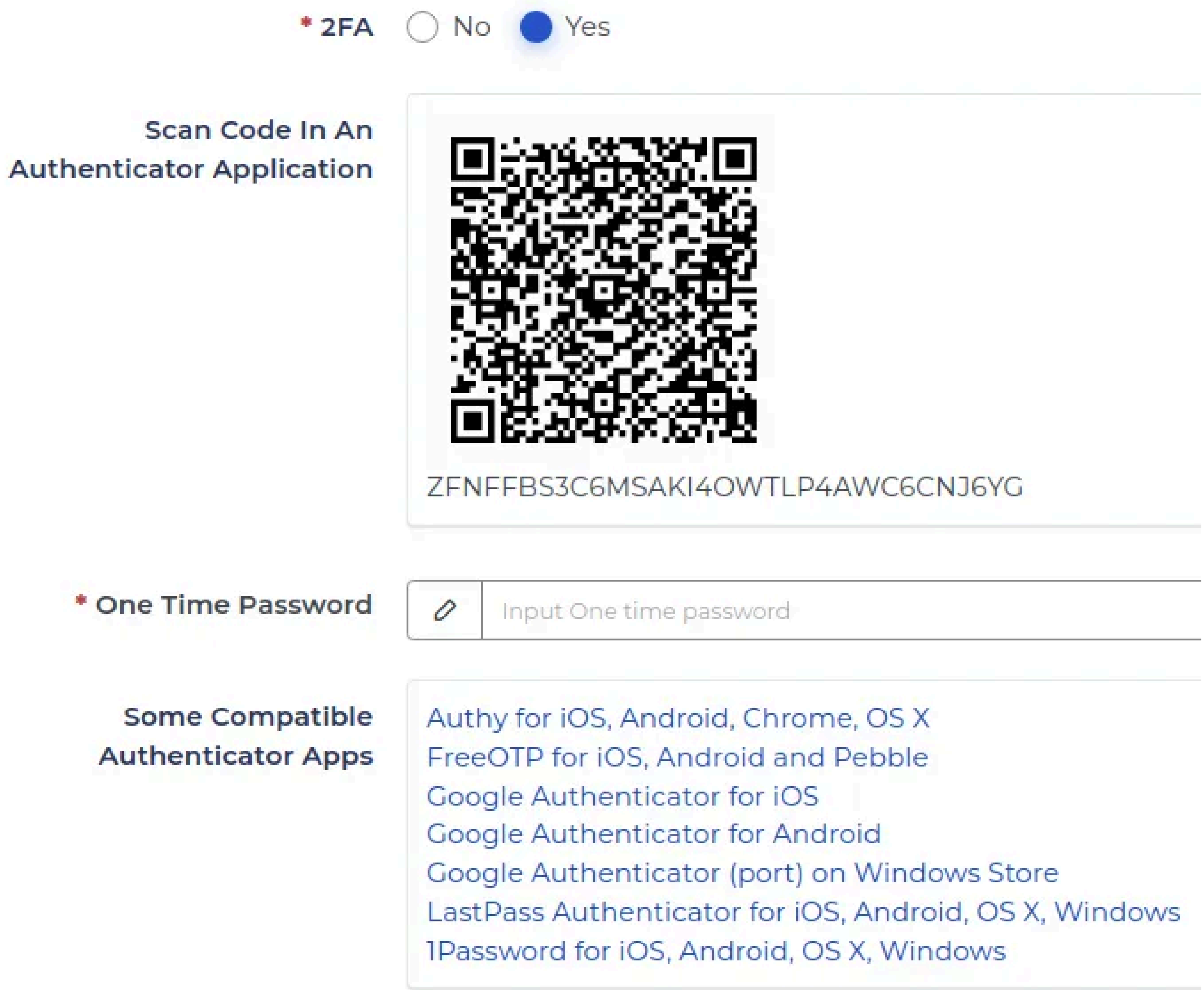


NOTE: In the “Old Password” field, enter the password received in the email during registration.



4. Enter a new password for logging in and choose preferences for two-step verification.

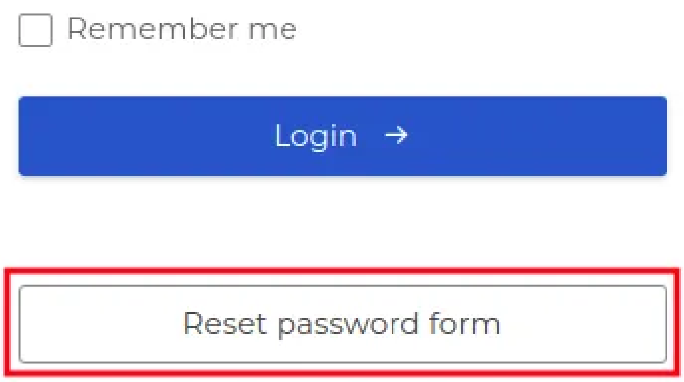
NOTE: Two-factor authentication enhances account security by requiring additional verification. Once set up, it requires entering a one-time password from an app on your phone or computer.



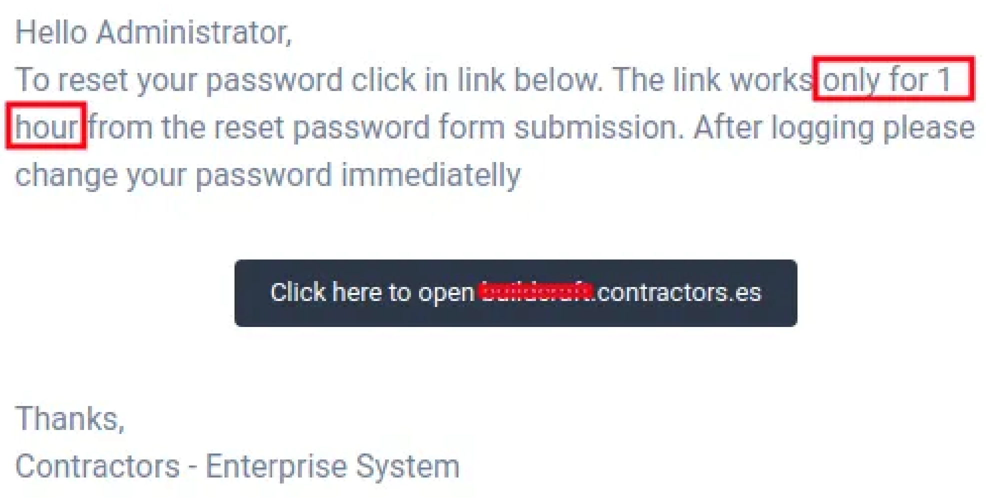
5. Optionally, configure two-factor authentication with the option to avoid asking for a one-time password when logging in from your own computer.

Password Recovery

1. If you forget your password, use the reset option.



2. Check your email inbox. You will receive a message with a link to reset your password.



REMEMBER: After resetting your password, immediately set a new one.

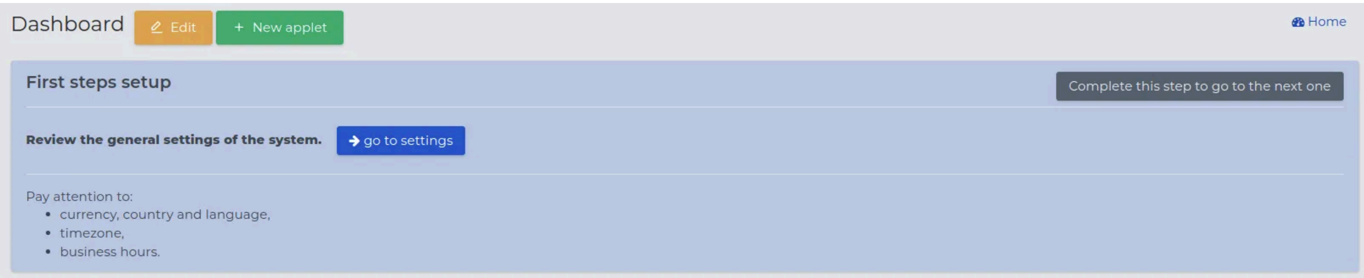
NOTE: The reset link is only active for one hour. After that time, you will need to use the password reset function again.

First Steps - Configuration

After registering an account and logging in as an administrator, you will receive instructions on how to configure the system. Before you start, we recommend going through all the steps to tailor the system to the unique needs of your company.

Step 1: Review the general system settings.

The first step is to adjust the general system settings, which are available in the Admin -> General Settings menu. The general system settings are crucial for customizing it to the needs of the company.



1. Verify and adjust settings such as: calendar, working hours, language, time zone, currency, sidebar appearance, by going to the settings using the button:

> **NOTE:** Most parameters are configured automatically by the system taking into account the current location of the company. However, in some cases, there may be a need to make minor changes.

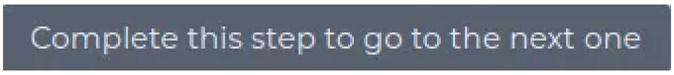
2. Review the values for field names that have been automatically filled in by the system:
   - **Logo** - allows you to set the company logo that will be displayed in the system (e.g., during login).
   - **Header** - content that appears on the user login screen.
   - **Country, province, time zone** - set automatically, it is worth verifying the values set by the system. Missing information should be completed.
   - **Default currency** - the currency that will be set as the first choice in currency fields.
   - **Units of measure** - the default system of units: metric or imperial.
   - **CRM: Calendar - hours range** - the range of hours available in the CRM calendar.
   - **CRM: Calendar - duration of the time slot** - the minimum time range visible on the CRM calendar.

- **CRM: Calendar - default working hours** - the range of hours for a working day.
- **Main company** - the company that uses the system.

> **NOTE:** During some stages of configuration, short tips will appear. They may concern changes that are set by default or decisions that you will have to make.

> **REMEMBER:** To proceed to the next step of the setup, simply click on the field:

> **NOTE:** If a setup step is not completed, a message will remain visible at the top of the screen:



> **REMEMBER:** With an unfinished initial setup, upon re-logging, you will be able to continue the configuration without losing previously entered data.

> **NOTE:** After each completed step, a percentage of the setup completion will be displayed, indicating the remaining amount to be completed.

Step 2: Review the leave settings.

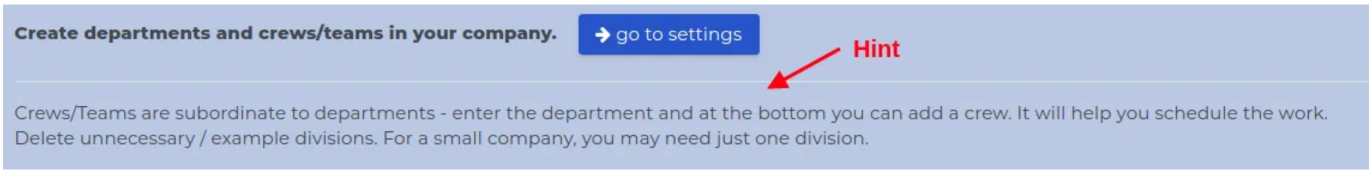
The next stage is to set the rules for the company's leave plan, which is available in the Admin -> Leave Settings menu. The system will take into account the settings entered when settling employees, determining the number of entitled leave days depending on the days worked. These data have been set by default in the system and can be changed.

1. Verify and adjust the default settings visible after selecting the "Go to Settings" button.
2. Proceed in the same way as in **Step 1**.

> **REMEMBER:** The leave plan in Poland is regulated by the provisions in the Labor Code.

Step 3: Create departments and squads in your company.

In the next step, the system settings relate to the names of departments and squads, the number and availability of which you can adjust to the needs of the company. Settings for this step of the configuration are available in the Admin -> CRM -> Departments menu. By default, three departments have been set up in the system: “Administration”, “Painting”, and “Flooring”. They can be changed using the “Edit” button.



1. Read the visible tip and “Go to Settings”.

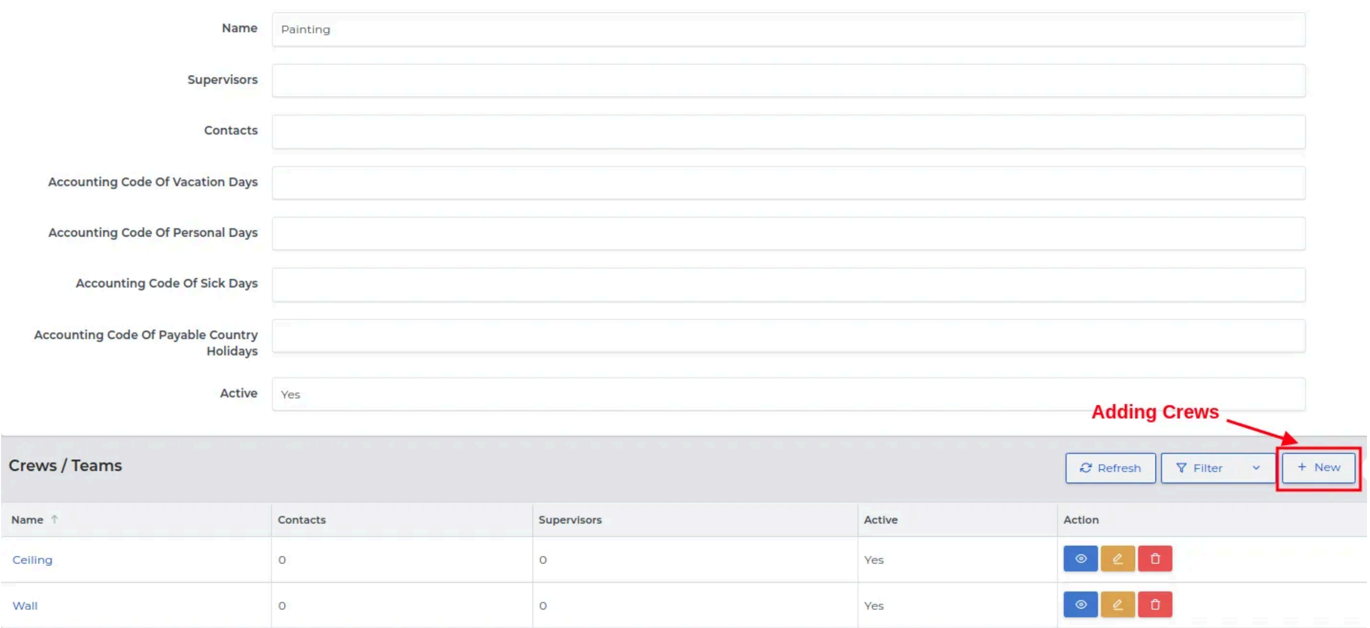
2. Verify the names of the default set departments and create additional departments if there is a need by clicking the “New” button.

> **NOTE:** The system administrator is automatically assigned to the “Administration” department and can also add themselves to other departments.

> **REMEMBER:** Assigning employees and granting them roles and functions will only be possible after completing the simplified system setup.

3. Create brigades associated with departments. First, display the selected department name, and then start adding brigades to it using the “New” button.

Example brigades created for the “Painting” department, e.g., wall brigade, ceiling brigade.



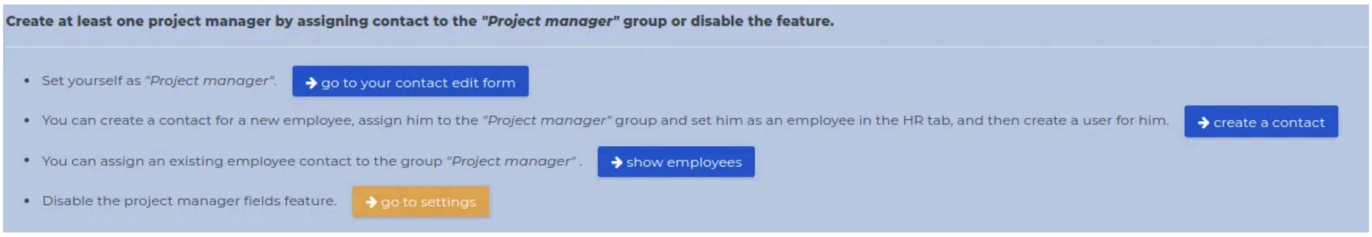
4. Save the brigade creation forms using the "Confirm" button.

> **NOTE:** Every contact or brigade added to a specific department prevents the future removal of that department.

Name ↑	Contacts	Crews / Teams	Supervisors	Active	Action
Administrative	1	0	0	Yes	
Flooring	0	0	0	Yes	
Painting	0	2	0	Yes	

Step 4: Create at least one project manager.

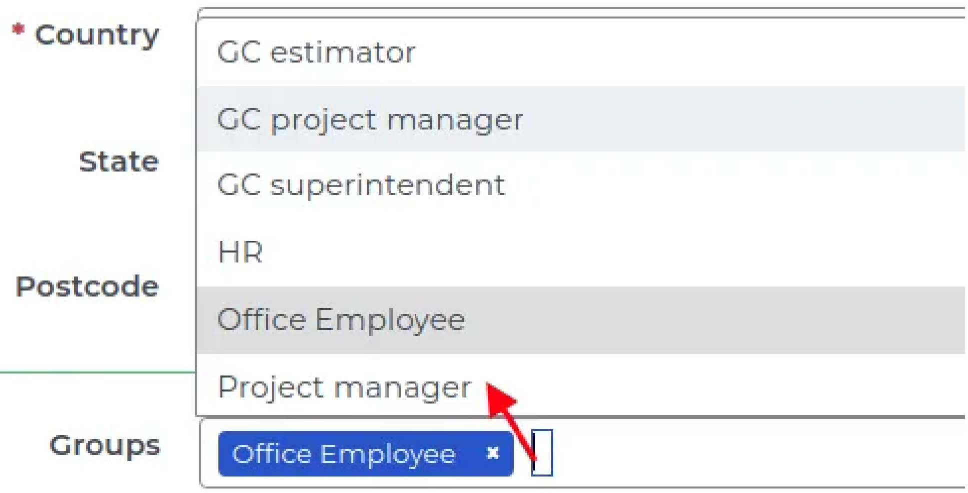
The "Project Manager" role that can be set in the system will depend on the number of requirements in the company related to this position. These system settings are available in the Admin -> Access -> Users section. Depending on the role assigned, the user is simultaneously granted the appropriate permissions. This step can be skipped along with selecting the last available option "Disable the project manager function".



1. Choose one of the four available options proposed by the system:

   I. Set yourself as the project manager.

- Click the "Go to edit your contact" button.
- In the dropdown list in the "Groups" field, select the name "Project Manager".



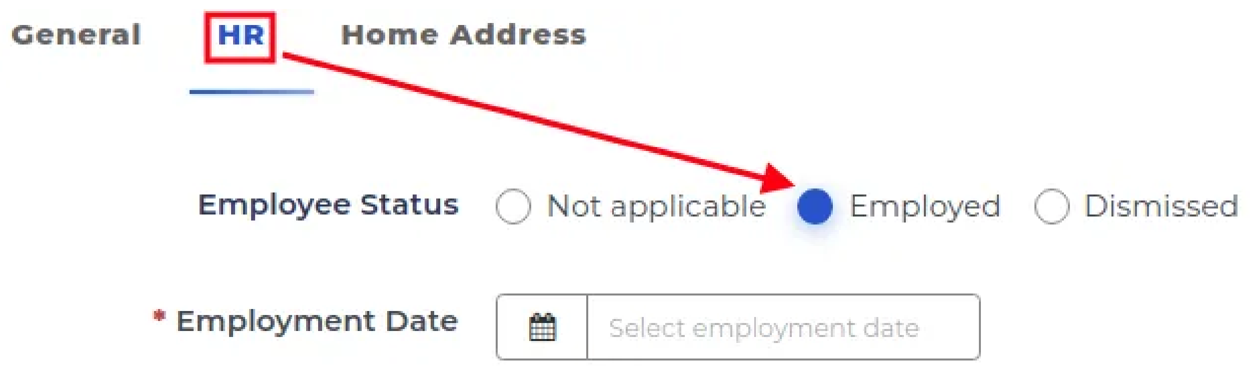
NOTE: The information visible on the blue field confirms that you have an account set up in the system and for each new "Group" name you are added to, the appropriate permissions will automatically be assigned to you.

- Verify the correctness of the data entered into the form and save the changes with the "Confirm" button.

REMEMBER: Make a selection in the "Permissions" field, where the available options on the list are described [here]/en/first-setup/1/#permissions).

II. You can create a contact for a new employee, assign them to the "Project Manager" group, and in the HR tab set them as an employee, and then create a user for them.

- Click the "Create contact" button.
- Fill out the form by entering the details of the employee who is to serve as "Project Manager".
- From the drop-down list in the "Groups" field, select the name "Project Manager".
- Make a selection in the "Permissions" field according to the description available here, and then confirm the changes by clicking the "Confirm" button.
- In the preview of the displayed form, go to the "HR" tab, set the Employee Status to "Employed" and save the data using the "Confirm" button.



- In the upper right corner, click on "Create user".

NOTE: Creating a user account in the system is only possible after changing the employee's status to "Employed".

- Fill in the fields on the displayed form and save the changes with the “Confirm” button.

> **REMEMBER:** In the “Roles” field, define the “Required” values, without which it will not be possible to select any employee from the list, e.g., a Project Manager must also be an office worker.

III. You can assign another existing employee contact to the “Project Manager” group.

- Click the “Show employees” button.

> **NOTE:** You are currently the only employee entered into the system. The values for the fields available in this option will remain empty until they are filled with information about other employees. Then you will be able to proceed according to the scheme described below:

- Choose from the entered employees the contact to whom you want to add the “Project Manager” group.

> **REMEMBER:** An employee entered into the system must meet certain “Requirements” to be able to be assigned to several groups at the same time.

- Click on their name, go to the edit form, and add or change the group name previously assigned to them.
- Save the changes with the “Confirm” button.

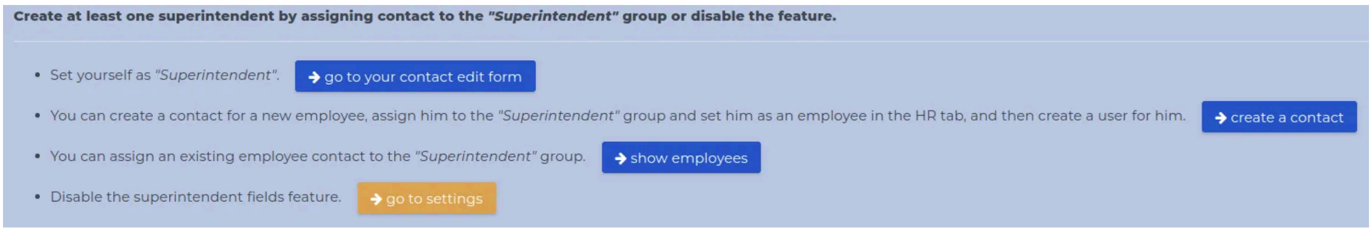
IV. Disable the project manager functions.

- Click on the “Go to settings” button.
- In the “Value” field, select the “No” option and save the changes with the “Confirm” button.

2. Fill in the form displayed according to the choice made and proceed to the next step of the system configuration.

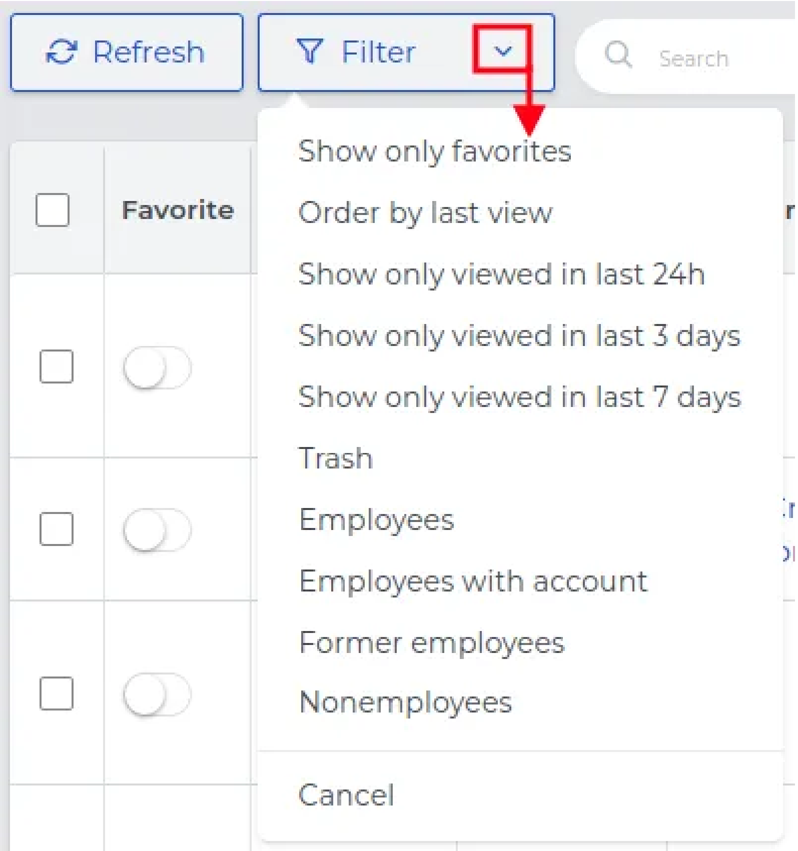
Step 5: Create at least one project manager assistant.

This configuration step is identical to the one described in **Step 4** and can be skipped by selecting the last of the possible options “Disable the project manager function”.



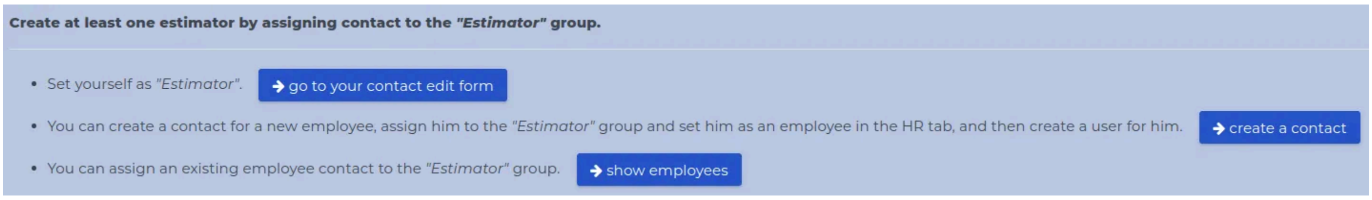
NOTE: If you previously created an employee account, the system will automatically display it on the list when you select the third option in this configuration step.

REMEMBER: You can change the visibility of records by selecting a different range from the available options on the list.



Step 6: Create at least one estimator.

In this stage of configuration, the procedure is similar to **steps 4 and 5**. Unlike previous stages, this step is mandatory. You must choose an estimator from among the employees and system users.

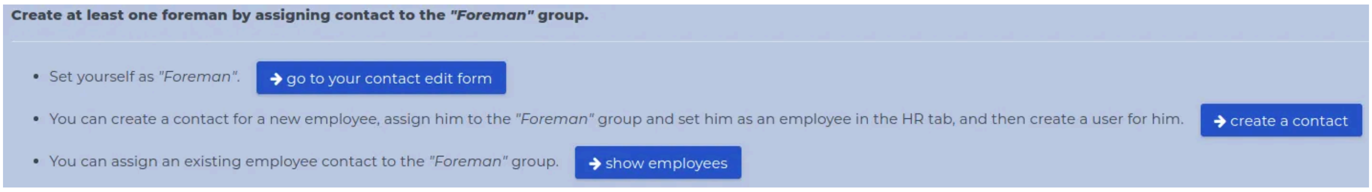


NOTE: In this step, you cannot disable the Estimator function.

REMEMBER: Depending on the number of parallel works on projects, there may be several selected Estimators in the system.

Step 7: Create at least one foreman.

The settings required in this step are identical to those described in **Step 6**. You cannot skip this step. You must choose a foreman from among the employees and system users.



NOTE: In this step, you cannot disable the Foreman function.

REMEMBER: Depending on the number of parallel works on projects, there may be several selected Foremen in the system.

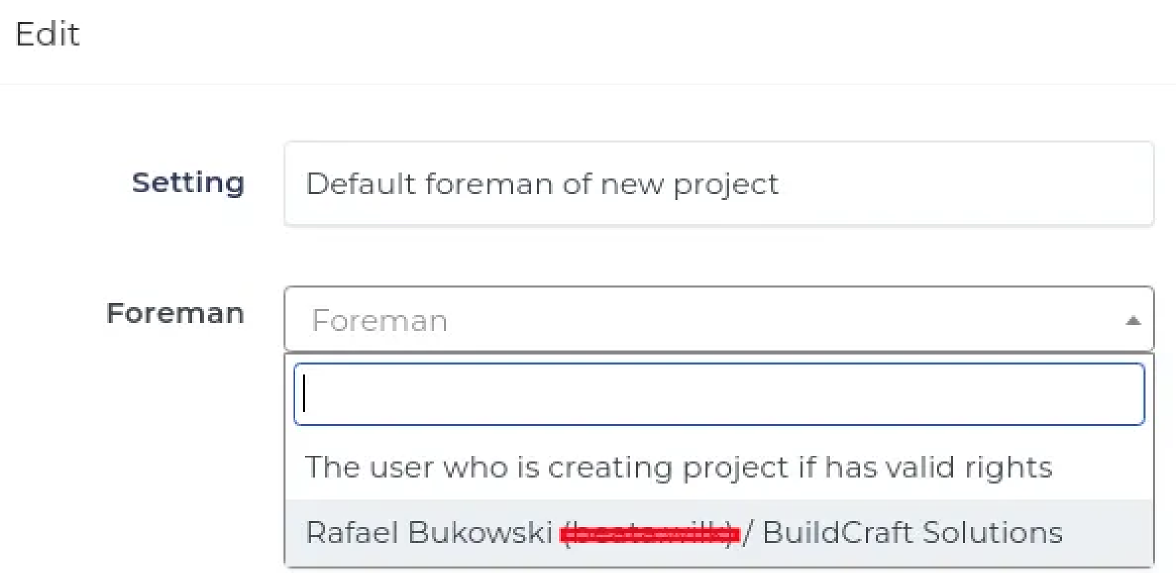
Step 8: Review contract management settings.

In this configuration step, review the contract management settings available in the Admin -> Contracts -> Settings menu. These parameters affect the management and monitoring of agreements between the company and clients. Default values are already set for most fields, but you can change them according to your needs.

1. Verify and adjust the default settings visible after selecting the "Go to Settings" button.
2. Make any changes by clicking the "Quick Edit" button next to the selected record and save them with the "Confirm" button.

REMEMBER: Assigning values to fields starting with the word "default" means that these record names in the system will automatically be filled with entries specified in the form. You can specify who will be visible in a given group by choosing one of the following settings:

- **The user creating the project, if they have the appropriate permissions.** This means that any user who creates such a document will be visible, provided that they belong to the given group and perform the appropriate roles in the system.
- **A specific user selected from the list** belonging to the given group (e.g., Cost Estimator).



Step 9: Review work scheduling settings.

The next stage of configuration concerns the work scheduler, available in the Admin -> Contracts -> Scheduler Settings menu. The parameters visible on this list can affect better control and efficient management of projects using employee work. Default values are already set for most fields, but you can change them according to your needs.

- Verify and adjust the default settings visible after selecting the “Go to Settings” button.
- Make any changes by clicking the “Quick Edit” button next to the selected record and save them with the “Confirm” button.

> **NOTE:** The notification sending time determines the hour at which the employee receives information about the upcoming work assignment, i.e., the place and time to report for the project.

> **REMEMBER:** In order for an employee to receive notifications about work assignments, they must have the Contractors.es mobile app installed on their mobile phone.

> **REMEMBER:** The limits set in the fields regarding informing the supervisor about being late or leaving work early, as well as the employee moving away from the place of assignment, are recorded in the web application under Contracts -> Planner -> Review Events. Events recorded in this way will help determine how honest and conscientious a given employee is.

> **NOTE:** In conjunction with GPS navigation, you will receive warning signals when the limits you have set are exceeded by the employee.

> **REMEMBER:** The employee does not receive notifications about exceeding the limits you have set.

Step 10: Create general types of work that you perform in your company.

At this stage of configuration, set up the types of work available in your company. In the Admin -> Contracts -> Project Types menu, the system has by default defined the most commonly encountered areas of construction work, such as: Construction, Renovation, Expansion, and Support.

1. Verify and adjust the default settings by clicking the “Go to Settings” button.
2. Make any changes by quickly editing the selected record and save them using the “Confirm” button.
3. Add new types of work (e.g., Installation, Demolition) using the “New” button and save them with “Confirm”.

> **NOTE:** Without adding a new type of work, you will not proceed to the next step of configuration.

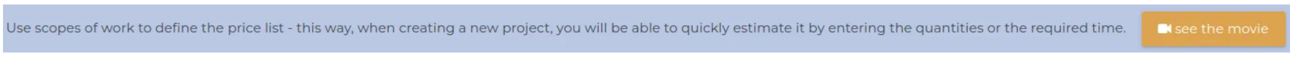
> **REMEMBER:** Records added to the list can only be deleted until they are associated with other system records.

Step 11: Create work scopes. This is also your price list.

In this step, select work scopes from the available list in the Admin -> Contracts -> Work Scopes menu that best reflect the profile of your company. The system has entered a list with the names of the most commonly encountered work scopes in the construction industry. These include, among others, Foundations, Smokestacks, Laying floor panels.

1. Verify and adjust the default settings by clicking the “Go to Settings” button.

2. You can watch a video that step by step shows how to create work scopes.



3. Remove unnecessary work scopes from the list, and determine the valuation methods for the remaining ones.

4. In the form, mark the selected valuation method among the available: individual, according to an adjustable unit rate or hourly rate, or according to a fixed unit rate or hourly rate.

> **NOTE:** Depending on the type of valuation you choose, the number of fields in the further part of the form you fill in may change. Changes will correspondingly affect valuations according to: **adjustable and fixed hourly rates** (value specified in PLN for the hourly work rate), and **adjustable and fixed unit rates** (value specified in PLN for 1 unit, number of units, and estimated number of hours allocated for 1 unit).

Examples of valuations available in Contractors.es:

- **Individual valuation** - roughly determines the value of performing a specific scope of work.

> **Example:** Digging a well depends on many factors, which the contractor determines. The method is based on life experience and the calculation of basic materials. It is used when a company provides a narrow range of services with similar profitability.

- **Adjustable rate per unit / per hour** – a flexible option, tailored for a unit, dependent unit, operational department, or individual process. It differs from a fixed rate by considering current market factors.

> **Example:** The demolition of a building in the city center, with restrictions and procedures imposed by the City Hall, requires a valuation based on variable unit costs. The contractor must consider these factors in the overall calculation.

- **Fixed rate per unit / per hour** – a simple and often used method, determining the final value of the service for a specific task.

> **Example:** When valuing the laying of floor panels, the contractor measures the area and multiplies it by the established unit value per m2. The worker is charged per hour of work according to the set hourly rate. Market prices are imposed by professionals in the field, usually, they are similar to each other.

> **NOTE:** When estimating a project, determine whether you include the cost of materials. If the client provides the material, indicate: **"Estimated Material Cost – No"**.

> **REMEMBER:** If there are associations with other records in the system for a given scope of work, you cannot remove it from the list. However, you can deactivate the "Activity" option, which will make this scope no longer available for selection when creating another estimate in the system.

4. Add new types of work scopes (e.g., Deck Laying) using the "New" button and save them with "Confirm".

Step 12: Thank you for setting up the system.

You have successfully reached the end of "First Steps with the System". Save the settings you have entered using the button:

We invite you to add the rest of the staff, import contacts and companies, and to create your first project, complete the inventory list, and many other activities using the instructions available for different system modules. Don’t forget about our mobile app for manual workers. If you have any questions, feel free to contact us. We are ready to answer them and provide assistance.

Data Import

The use of this feature requires the ability to export data from another program that has been used so far.

The data you want to copy into the system can be transferred automatically. This process is particularly helpful when the company's database is very extensive, and rewriting (manual data entry) would take a considerable amount of time.

Preparing the file for import

1. The file with data intended for import must be properly prepared. You can generate it from the system you have worked on before.

2. The Contractors.es system importer supports the following file types: *.CSV; *.XLSX.

> **NOTE:** This data must be arranged in columns, in accordance with the described headers, as shown below.

	A	B	C
1	First name	Last name	City
2	John	Brown	London
3	Emily	Miller	Manchester
4			
5			
6			
7			
8			
9			
10			
11			
12			

Example: Data for import belonging to the "Contacts" group:

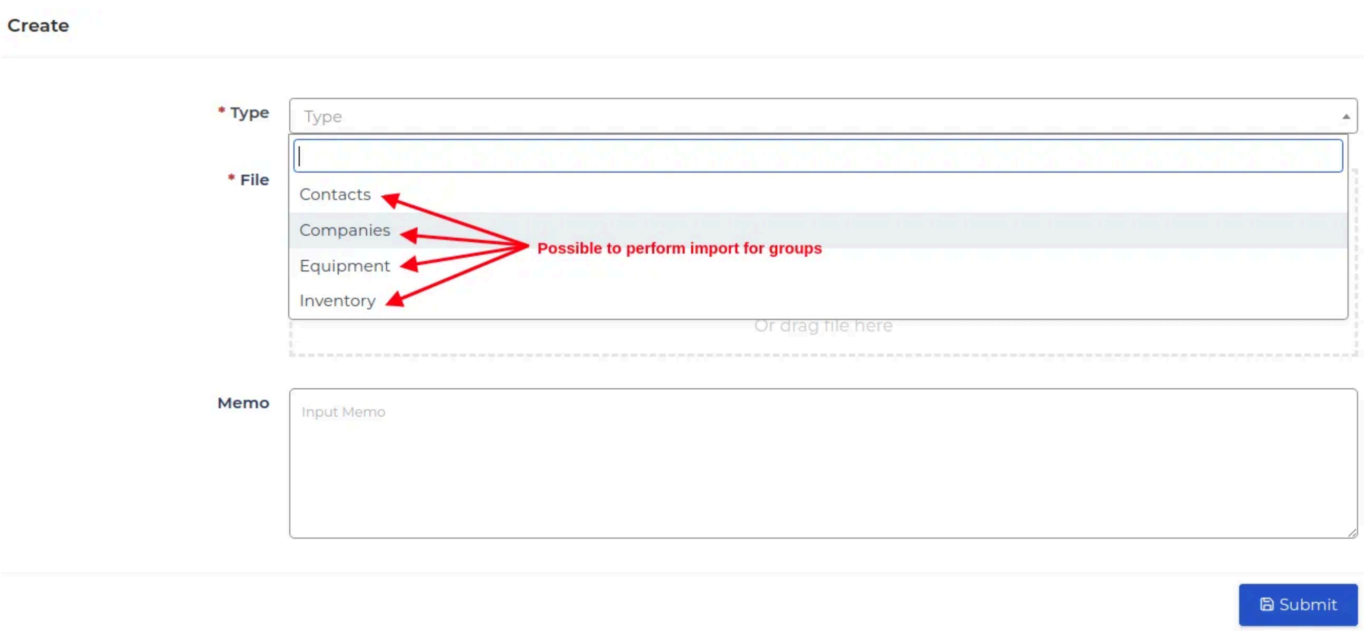
- First Name
- Last Name
- Title
- Company (exact company name - must be in the system)
- Company - Record ID (ID number of the company in the Contractors.es system)
- Company - External ID

- Business Phone
- Mobile Phone
- Fax
- Email
- Website Address
- Address 1, 2
- City
- Country
- ISO country code (for Poland it will be: PL)
- Province
- Province Code
- Department (the name must exist in the system)
- Groups (groups must be defined in the system and should be separated by commas or a vertical bar)

Basic data import

1. To start importing data, go to the data import module in the system menu: Admin → Import.
2. Click the “New” button in the upper right corner of the screen.
3. In the form, specify the type of file to be imported.

> **NOTE:** The system allows data to be imported only to the groups: “Contacts”, “Companies”, “Equipment”, and “Materials Warehouse”. In these groups, statistically, there may be the most data to import.



> **NOTE:** Completing as many fields as possible intended for import at one time will significantly speed up the data transfer process itself. A preview of fields in selected target groups (record types) is available by going, for example, to the creation of such a record:

- CRM → Contacts
- CRM → Companies
- Equipment → Equipment List
- Material Warehouse → Material List

4. Upload a file with data prepared in the appropriate format from your disk (*.CSV; *.XLSX).
5. Save the uploaded file to the system using the “Confirm” button.

Assigning Columns

Simply uploading the prepared file will not input the data into the correct fields in the system. You need to link the field names with the fields available in the data group forms you want to import.

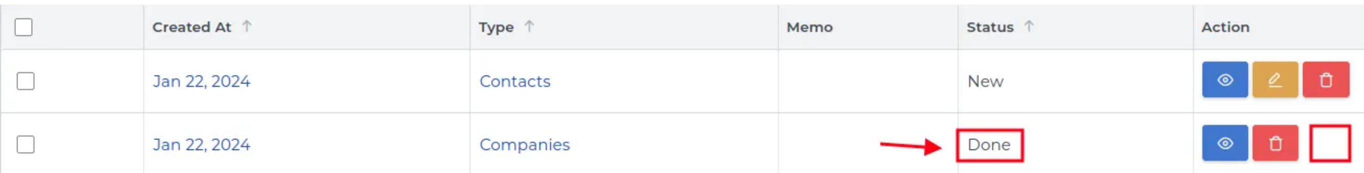
1. Select the record from the list of uploaded records whose file columns you want to link with the data in the system first.
2. Go to its “Edit”.
3. Fill in the fields in the form by selecting the appropriate columns from the uploaded file from the list.

4. Check the “Process File” box as active.

5. Save the entered data with the “Confirm” button located at the bottom of the form.

NOTE: If you do not set the column mapping correctly, the system will not allow the import to be performed.

> **REMEMBER:** Correctly imported files on the record list will receive the status “Completed”.



NOTE: A record with this status will not be editable anymore.

Frequently Asked Questions

1. **How can I create an account on Contractors.es?**

   You can create an account on Contractors.es by clicking on the link located on the page https://contractors.es/ and filling out the registration form along with accepting the terms and conditions and privacy policy.

2. **Where can I find a discount code?**

   Discount codes, allowing you to take advantage of a discount - are provided on our social media and on the pages of our partners.

3. **How do I change the password for my account?**

   You can change the password for your account at any time by selecting the “Settings” drop-down tab visible in the upper right corner of the administrative panel screen. You can read more about this here.

4. **What should I do if I forgot my password?**

   Use the password reset function, which has been described in detail here. You will receive a link to reset your current password to the email address provided during registration.

5. **What should I do if the password reset link expires?**

   If the link expires, use the password reset function again. Remember that this link is only active for one hour.

6. **What is two-step verification and is it necessary?**

   Two-step verification is an additional level of security in the authentication process, aimed at increasing the security of the user’s account. In the standard login process, the user only enters their username and password. In the case of two-step verification, after correctly entering this data, the user must additionally confirm their identity with a second dynamically generated password, e.g., a code delivered by SMS or a temporary password generated by a dedicated application. Although two-step verification is not necessary, it is strongly recommended, especially for accounts containing important or sensitive information. It acts as an additional protective barrier, even if the user’s password has been intercepted or compromised. If you use online services that offer two-step verification, it is worth enabling it for an additional layer of security.

7. **How can I use the data import feature in Contractors.es?**

   To use the data import feature, you must be able to export data from the program you are currently using. Prepare a data file in *.CSV or *.XLSX format and go to the data import module in the Admin → Import menu. More information about the data import process can be found here.

8. **How to prepare a file for import?**

   The data file you plan to upload to the Contractors.es system must be carefully prepared. The Contractors.es system importer supports the following file types: *.CSV; *.XLSX. Make sure the table contains all the required columns and their names are given in the first row.

9. **What file types does the Contractors.es Importer support?**

   The Importer supports files in *.CSV and *.XLSX formats, whose detailed meaning is as follows:

   CSV (*.CSV):

   - The CSV format is a text file in which data is stored as text, and values in each row are separated by a delimiter, most often a comma.
   - Each row represents a single record, and the columns in that row are separated by the delimiter.
   - CSV is widely used, easy to understand, and supported by many programs and tools.

   XLSX (*.XLSX):

   - The XLSX format is a file format used by Microsoft Excel to store spreadsheets.
   - The XLSX file is also supported by other office suites, such as Libre Office, Open Office, etc.

   Both formats are commonly used to store tabular data and are easily processed by various applications.

10. **What data groups can I import into the system?**

    The system allows data import only to the groups: ‘Contacts’, ‘Companies’, ‘Equipment’, and ‘Materials Warehouse’. These are the target groups where statistically the number of records can be extensive, which significantly shortens the time spent on manually entering data into the system.

11. **Can I import data to multiple groups at the same time?**

    You cannot import data belonging to different system groups at the same time. This is related to the column mapping process which you can read more about here.

12. **What if the import file does not contain all the required columns?**

    It will be necessary to correct the import file and add the missing columns.

13. **How to check the status of the imported file?**

    Successfully imported files will receive a “Completed” status on the record list. A record with this status will not be editable.

14. **Is it possible to undo data import?**

    If the import file has been correctly uploaded to the system, it is not possible to undo the import with the submitted data. In case of an error, it will be necessary to manually correct them or interrupt the file upload process.

15. **How can the remaining data be imported into the system?**

    You can use the application’s API, but this requires programming knowledge. Please contact us.

16. **Does the Contractors.es software work with other applications?**

Yes, Contractors.es has integrations with various applications, which allows for free data exchange. This functionality makes it easy to adapt the program to the existing software ecosystem in your company. Please contact us for details.

17. **What data security does the Contractors.es system guarantee?**

    Our software offers comprehensive data security, including encryption, user authentication, meticulous permission management, regular backups, and other measures aimed at ensuring the confidentiality and integrity of data.

18. **Does the software offer technical support?**

    Yes, we provide technical support for our software. Our team of specialists is available to provide assistance, solve problems, and answer any questions regarding features and use of the program. You can always use the active chat available in the lower right corner of the screen.

19. **Will the data entered during an interrupted configuration process be saved after logging in again?**

    Yes, you will be able to continue the configuration without losing previously entered data.

20. **How can I tell how many configuration steps are left to complete?**

    After each completed step, a percentage of the configuration completion will be displayed, indicating the remaining amount to be completed.

21. **Can I go back to previous configuration steps after logging in again, or is the process linear?**

    Yes, the system allows you to go back one step. After logging in again, the current step to be performed will appear on the dashboard, with information about the last step performed and the possibility of editing it. After completing the entire configuration process, go to the selected sections in the admin menu and make changes there if necessary.

22. **How can I set myself as the project manager?**

    To set yourself as the project manager, click “Go to edit your contact” and select “Project Manager” in the “Groups” field.

23. **How can I create a user account for a new employee?**

    To create a user account for a new employee, go to the “Create User” tab after changing the employee’s status to “Employed”.

24. **Why can’t the functions of the Foreman and Estimator be turned off in the system?**

    The Foreman and Estimator function cannot be turned off because it is necessary to have at least one entry for these contact groups in the system. These are important roles in the system that must be present for the system to function correctly in terms of project and contract management.

25. **What does assigning values to fields starting with the word “default” mean?**

    Assigning values to fields starting with the word “default” means that the names of records in the system will automatically be filled with entries specified in the form, e.g., in the “Estimator” field, it will always be Jan Kowalski.

Displaying Data and Basic Interaction

Managing the system involves mastering basic functions such as searching for data of interest and interacting with it, i.e., editing, viewing, deleting, and adding.

Basic Buttons on the Record List

Each selected record has buttons available that perform basic functions in the system. Depending on their location on the screen, we can divide them into the following groups.

1. In the upper right part of the screen:

- Creating a new record on the list.
- Exporting data.

2. On the left side of the screen, just above the list of records:

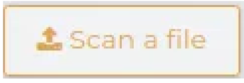
- Refreshing the list of records.
- Filtering data in records.
- Standard search on the list of records.

3. Optionally, other buttons may sometimes appear depending on the functionality offered by a given component, e.g.:

- Menu “Equipment → Rental Register”. Allows issuing several pieces of equipment to one employee at the same time.

- Menu “E-mail → Email Queue”. Enables updating the current list of emails that have not yet been downloaded from the mail server for further processing.

- Menu “Warehouse → Purchases”. Allows uploading a photo or PDF file with an order or invoice, automatically supplementing the warehouse list with scanned data.



- Tab “Attached → Email”. Allows attaching emails that have not yet been archived.

- Menu “Inventory → Stocktakings”. It allows you to conduct an inventory stocktaking.

- Tab “Attached → Email”. Allows attaching already archived messages to the displayed record.

Repeatable Action Buttons

Thanks to action buttons, we can appropriately go to the selected record and apply the chosen function. Action buttons are always located on the right side of the record on the list.

> **NOTE:** The visibility of action buttons depends on the permissions of the user currently logged into the system.

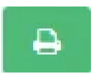
The following action buttons are available in the system:

1. Standard, repeating with each record:

- **Blue** “View” - used to preview the record (detailed view).
- **Orange** “Edit” - carries out the editing of the record.
- **Red** “Delete” - removes the selected record.

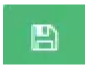
2. Additional, available only in specific modules:

- **Green** “Print device label” - Menu “Equipment → Equipment list”.



- **Green**
  - “Attach this email to another record” - Menu “Email → Archives”

- "Archive new email" – Menu "Email → Queue".



Basic buttons in the record view

The functional buttons visible in the record allow you to make changes to this record and create tasks directly related to it. They will always be visible in every displayed record and located on the right side of the screen.

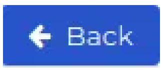
The basic buttons in the record view include:

1. A star on a light background allows you to add the displayed record to "Favorites". A record added to the "Favorites" list will be marked with a star field on an orange background.

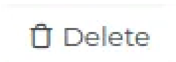
2. Allows editing of the record form (interchangeable with the orange action button "Edit").

3. Returns to the most recently opened list of records, located in a specific module of the system.

4. Returns to the most recently viewed record on a "step back" basis.

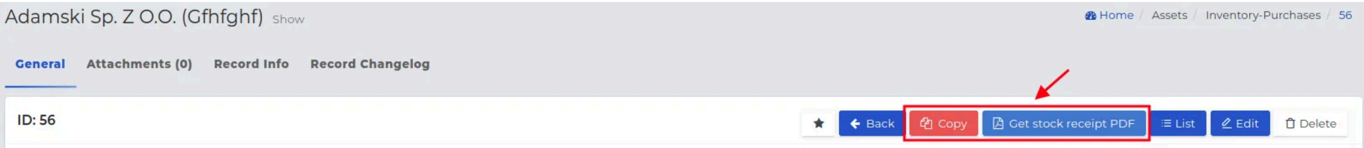


5. Permanently deletes the current record (interchangeable with the red action button "Delete").



Additional functional buttons

In some records, there are additional buttons with extra actions. These buttons will be available between the basic buttons in the upper right corner of the record view.

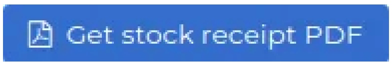


> **NOTE:** The visibility of additional function buttons is dependent on the permissions of the user currently logged into the system.

The buttons corresponding to the following functions in the system can be classified as:

1. Allows you to copy a given record.

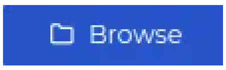
2. Generates the document created in the record to a PDF format version.



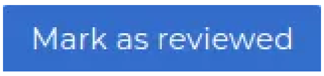
3. Displays a preview of the viewed record on the dashboard.

4. Saves form changes.

5. Choose file to upload and attach it to the record.



6. Allows you to change the status for records awaiting review of their content.



7. Confirms compliance in documents requiring approval.

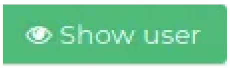
8. Allows uploading another attached file with data onto the disk.

9. Enables operations on the email inbox (interchangeable with the “Archive new email” and “Attach this email to another record” action buttons).

10. Enables sending an email message with the document generated based on the record.

11. Changes the status in those records that are waiting in the queue for execution.

12. Displays user data along with their permissions.



13. Allows you to create a new account for a user in the system.

14. Allows you to create a new material, the status of which can be tracked in the warehouse.

15. Generates a label for printing.

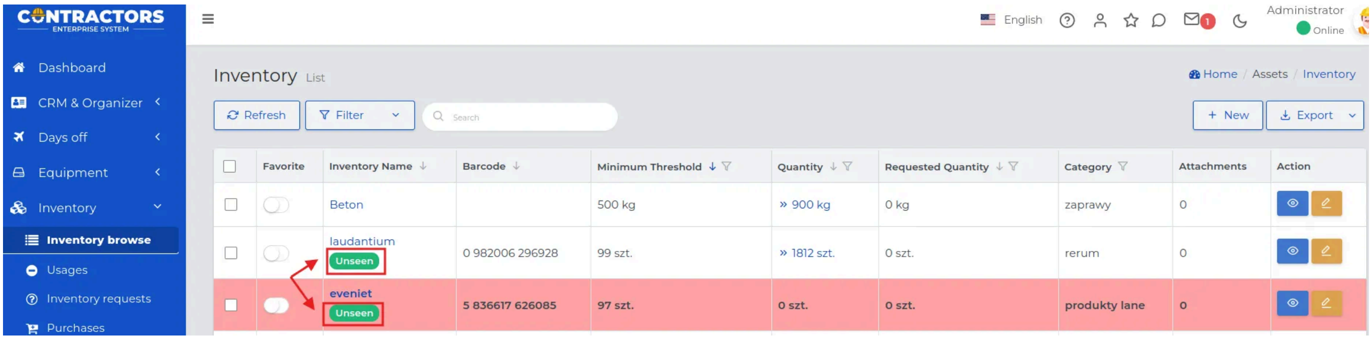
16. Allows you to add a new entity to the system without having to close the form that is currently being completed.

Basic Actions Related to Records

A record is a single entry with a proper name, visible on the displayed list of the selected system menu. The introduced names concern, among others, company names, contact names, material names, etc.

Depending on the screen size on which we view the data, the number of available columns in a record can vary. For example, for mobile phones, there will be two or three columns. For desktop computers and laptops, there will be six columns and more.

Records that have not been read since your last login to the system will be marked in the list as shown.



REMEMBER: New records in desktop applets will be marked the same way.

Preview and Edit a Record

You can preview the content of a selected record on the list by directly clicking on its proper name or by selecting the blue “View” action button.

You can edit a record in two ways:

- Click the ‘Edit’ button.
- Click the record name, then select the blue ‘Edit’ button in the top right corner of the screen.”

> **REMEMBER:** Before confirming changes, you can choose whether you want to continue editing this record, go to its view, or return to the place from which you clicked ‘Edit’. These options can be found at the bottom of the edit form.

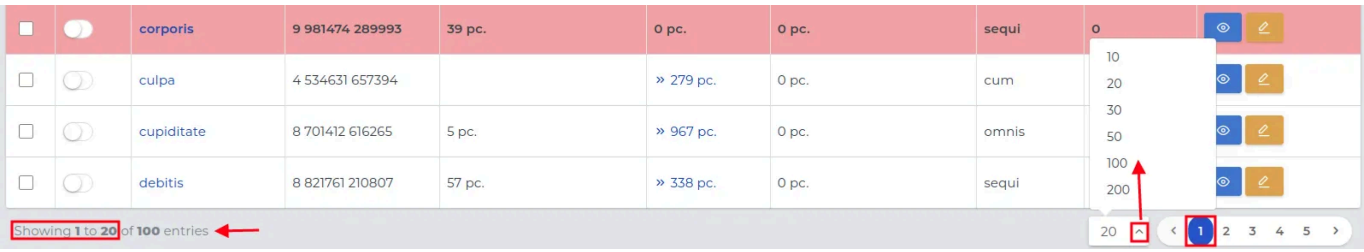
Undo changes - resets the filled-in form. In the case of a new record, it removes data from the form fields. In edit mode, it restores the field values saved in the database.

Go back - saves the entered data and returns to the view where you clicked ‘Edit’.

Continue editing - saves the changes made, remaining in the edit form, without returning to the list of records.

View - after saving, displays the edited record with the changes made.

> **REMEMBER:** The number of visible records is adjusted by changing the display settings. On the list, we choose how many records should be visible on the first subpage.



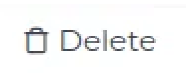
Adding and Removing Records

Creating and deleting records on the list is uniform throughout the system.

1. To add new records to the list, use the “New” button, located in the top right corner of the screen.

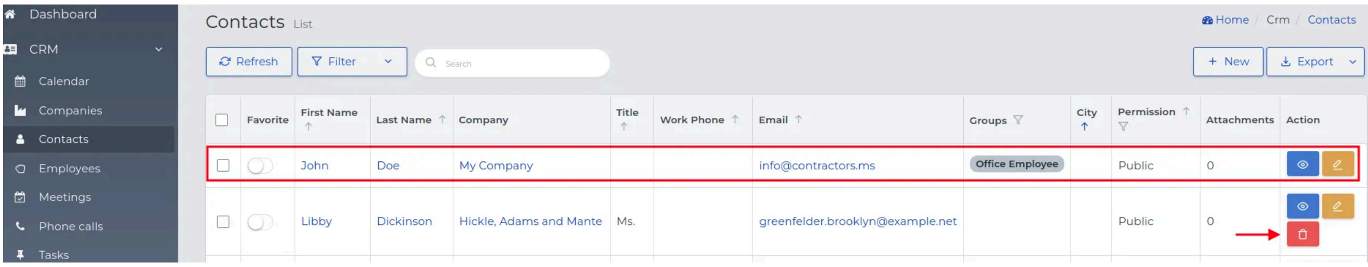
> **NOTE:** In some cases, the system allows for the creation of records with identical names, assigning them different ID numbers. However, it is recommended to delete unnecessary records or assign them additional attributes to facilitate their recognition.

2. To remove a selected record from the list, use the “Delete” function button or in the preview of the selected record choose “Delete”.



> **NOTE:** It may not be possible to delete a record from the system if it is associated with other elements, for example, if the equipment has already been rented by an employee, so you cannot delete this equipment.

Example illustrating the marking of a record in which there is at least one dependency between the other records in the system. The absence of the “Delete” function button indicates that no association has been recorded for the selected record.



Deleting multiple records

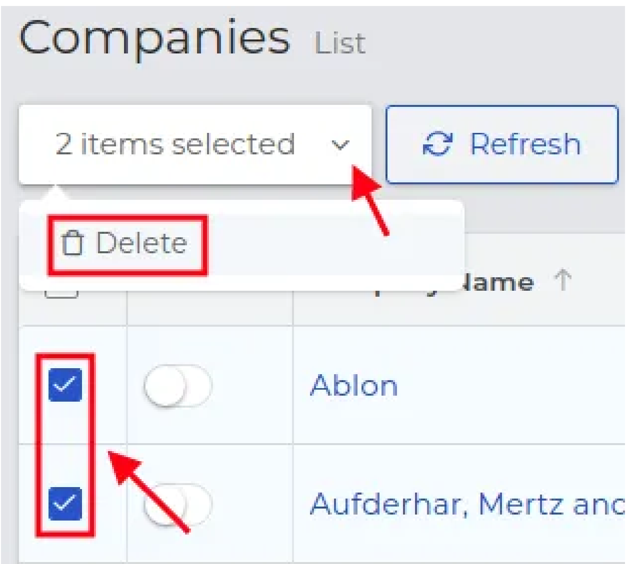
> **REMEMBER:** The system allows for the simultaneous deletion of multiple records from the list using the batch method.

Using the batch method to delete records proceeds as follows:

1. Select the records designated for deletion in the first column.

2. From the drop-down list, choose the “Delete” option and confirm this action in the next step.

3. The number of records on the list will be reduced by the number of marked records for deletion.

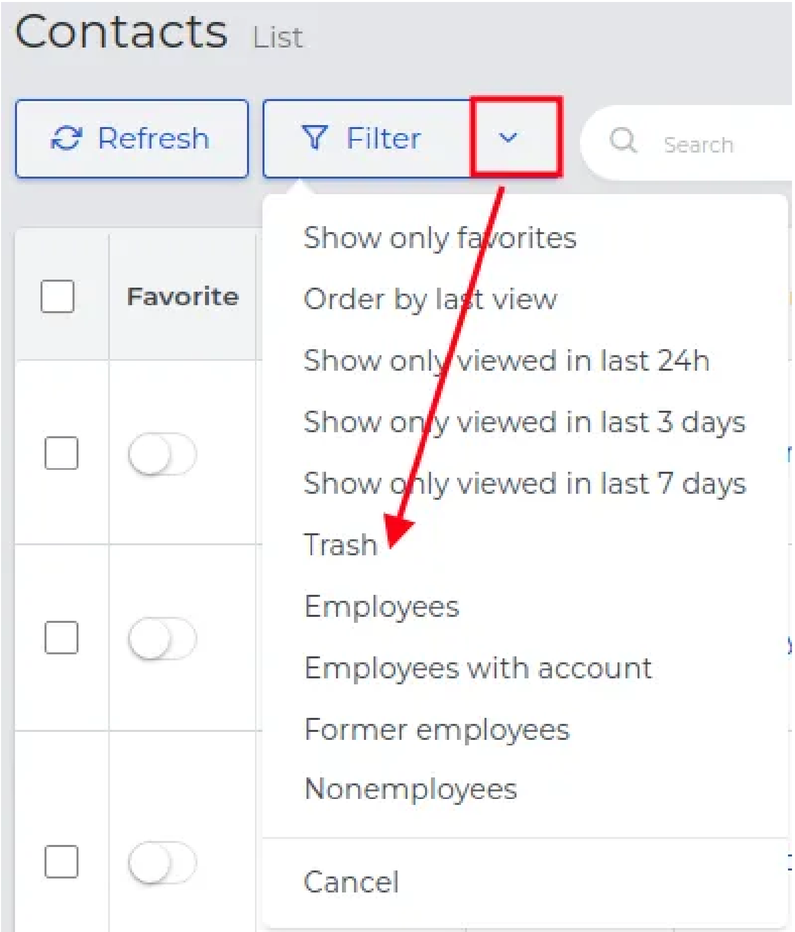


> **NOTE:** Deleted records go to the “Trash”, where the **administrator** can restore them to their original place of deletion, following the scheme below:

Restoring a record

1. Open the list of records from which you want to restore entries located in the “Trash”.

2. On the pull-out list, select the “Trash” option.



3. Select the record you want to restore to the main list from among all the deleted records.

4. Use the “Restore” function button.

5. The record will be restored and disappear from the list named “Trash”.

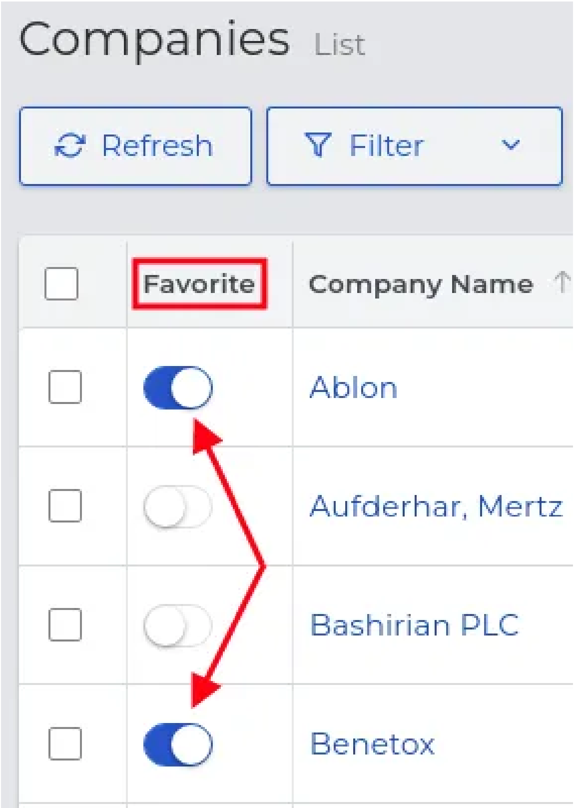
Favorite Records

Adding selected records to the favorites list allows for easy and quick access to the most frequently used items and to **track changes made to them by other users**.

To add a record to “Favorites”:

1. Activate the toggle next to the appropriate entry.

2. Records that have been marked in a specific way will be visible both on the selected module list and on the general list covering all system records that have been marked this way.



NOTE: A collective list of all favorite records is generated automatically and remains visible after selecting the star-marked icon in the main menu (at the top of the screen). The favorites list can be sorted using the drag and drop method.

NOTE: Adding a record to favorites does not automatically create an applet on the desktop with the prefix “favorite” e.g., “Favorite Contacts”. You need to add the appropriate applet to the desktop yourself and set it to display only favorite records.

Copying and Duplicating Records

Copying records is the process of duplicating data, useful for replicating or creating new entries based on existing ones.

> **NOTE:** Only certain types of records have the option to copy.

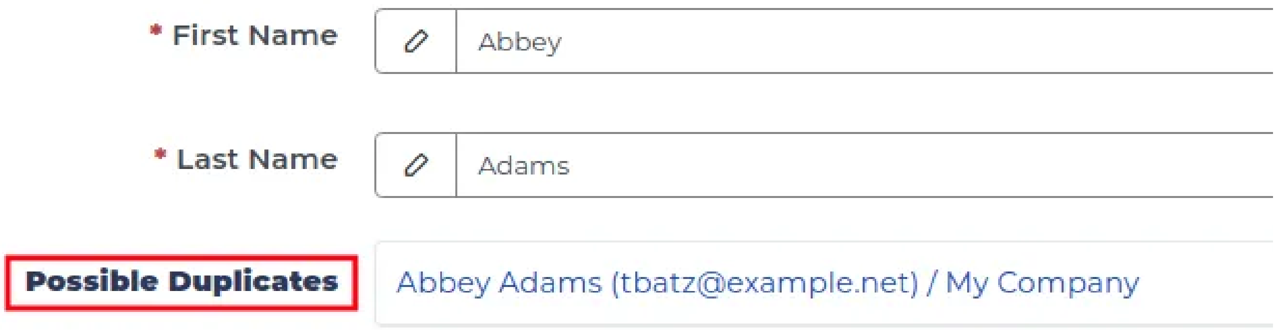
Example modules providing the option to copy records:

1. CRM -> Meetings, Calls, Tasks (changing the date for the entered event).
2. Equipment -> List (the same product names can be given a different serial number).
3. Warehouse -> Purchases, Inventories (changing the date for reordering and inventory stocktaking).

Protecting Contacts and Companies from Duplicates

When entering contacts and companies, the system may suggest duplicates for verification:

1. Start entering a “New” contact with a name that already exists in the system e.g., CRM -> Contacts -> Apolonia Adamczyk.
2. The system will suggest “Possible duplicates”.



3. You can choose the suggested duplicate and go to its “Edit” or continue entering additional data in the form fields, adding a very similar record.

> **NOTE:** After duplicating and saving the record, both entries will be visible during alphabetical sorting by name, arranged one after another.

Ways to Filter Records

All records entered into the system can be sorted and filtered accordingly. Contractors.es allows you to quickly and easily find a specific entry on the selected list from the system menu, according to the requirements set by the user.

> **REMEMBER:** Depending on the final effect we want to achieve, each of the following methods of filtering and sorting records can be used in any order one after the other. One method does not exclude the operation of the next.

Filtering on a Column by Associations

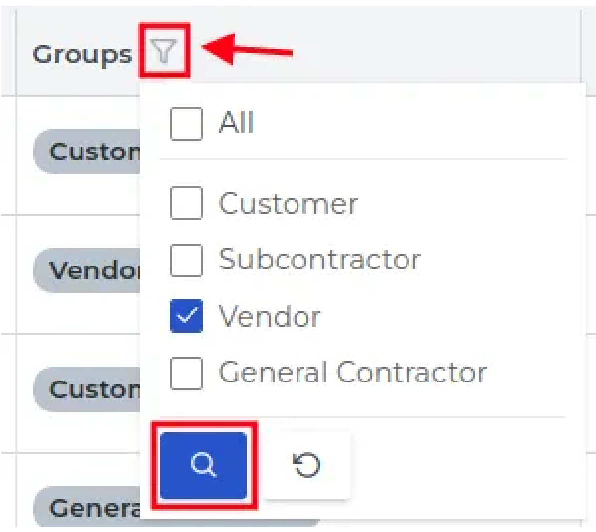
Filtering on a column by associations applies to all fields marked with a red asterisk, which are required when creating new records on the list.

> **REMEMBER:** In the table with the list of records, these variables will always refer to those column names next to which the "funnel" icon is visible.

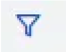
1. Open the selected list with records you want to filter.

2. Click on the "funnel" icon visible next to the column header.

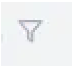
3. Choose one of the available subgroups, select the option you are interested in, and then confirm the search.



4. Only those entries that are associated with the variable you filtered by will be displayed on the list of records.

   - filter on the column is active.

   - filter on the column has not been set.

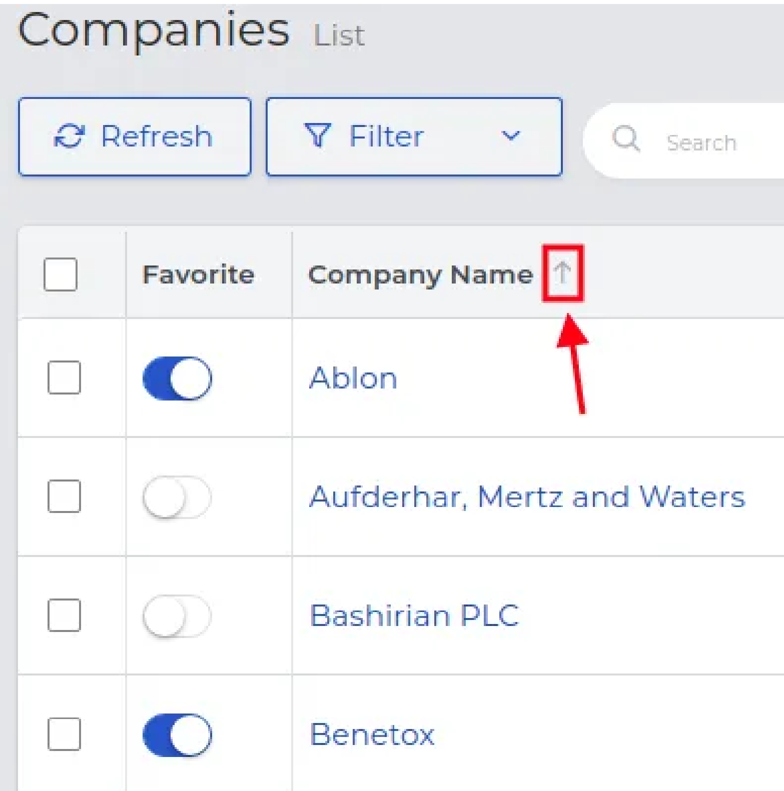
> **REMEMBER:** To reset all active filters, use the “Reset” button.

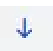
Standard Sorting on a Column

The entered records on the list can also be sorted alphabetically from A→to Z (sort ascending) and from Z→to A (sort descending).

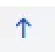
1. On the list with records, select any column name by which you want to sort.

2. Click on the “arrow” icon and set in what order you want the records to be displayed on the list.





- ascending sorting, from the smallest to the largest value (e.g., A -> Z).



- descending order, from the highest to the lowest value (e.g., Z -> A).

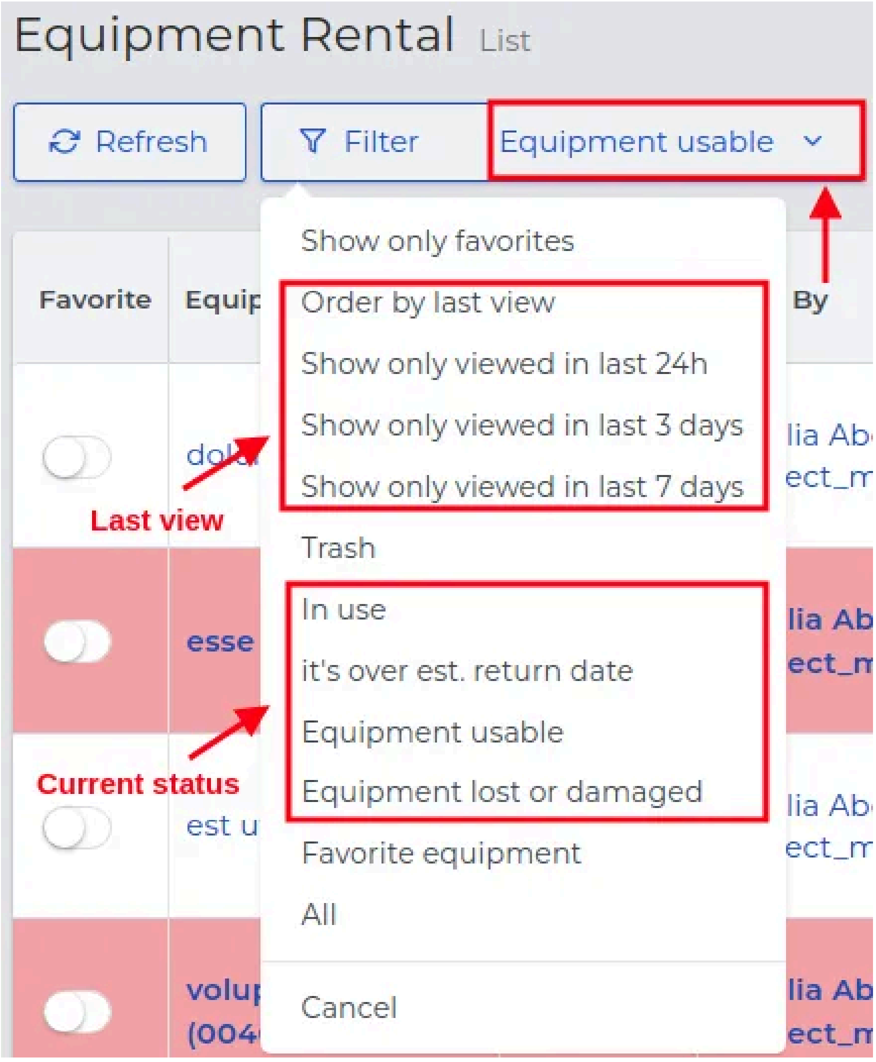
3. The list of records will be arranged according to your choice. Its order can be changed at will.

Predefined Filters

Records visible in the table can be filtered according to the default filters for a given data type.

> **REMEMBER:** Filters vary depending on the data type.

1. Above the list of records available for the selected module, click on the spot indicated in the screenshot below.



2. From the variables displayed on the dropdown list, choose how you want to filter the records.

3. Only those records that meet the selected condition will remain on the list.

> **NOTE:** The "Cancel" option visible on the dropdown list removes the last used filter and restores the default system settings. The option named "All" will display all records if by default not all are visible (e.g., by default only current and future records are visible, not past ones).

Detailed Filtering

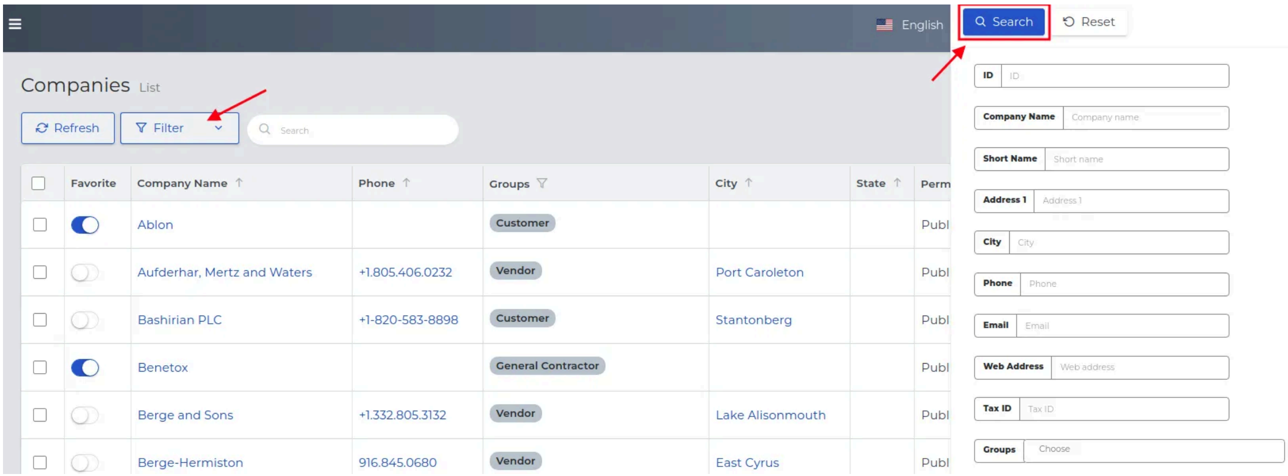
Detailed filtering is the process of searching data to extract only those that meet specific and detailed criteria. The search form contains fields corresponding to column names, as well as additional fields that allow for more precise specification of the searched phrase.

1. Above the list of records, select the “Filter” button.

2. On the right side of the screen, fill in the displayed form. Check the criteria according to which you want to filter the list of visible records.

3. Click the blue “Search” button.

4. Only those records that meet the criteria you have set will remain on the list.



> **REMEMBER:** You can use several variables at the same time for this type of search. The system will automatically limit the list, leaving only those records that meet all the criteria entered in the search engine.

> **NOTE:** To cancel the detailed filter, click the “Undo changes” button, which is located above the search table next to the “Search” button.

Quick Search

This is a commonly used word filtering method. This way of searching the list of records only includes the most important columns.

1. In the search field, type the first letters of the word or the entire word you want to find in the list of records.

2. Only those records in which the searched phrase was found will be displayed in the table.

NOTE: Returning to the full list of records is only possible by deleting the entered entry in the “Search” field.

Tabs available in records

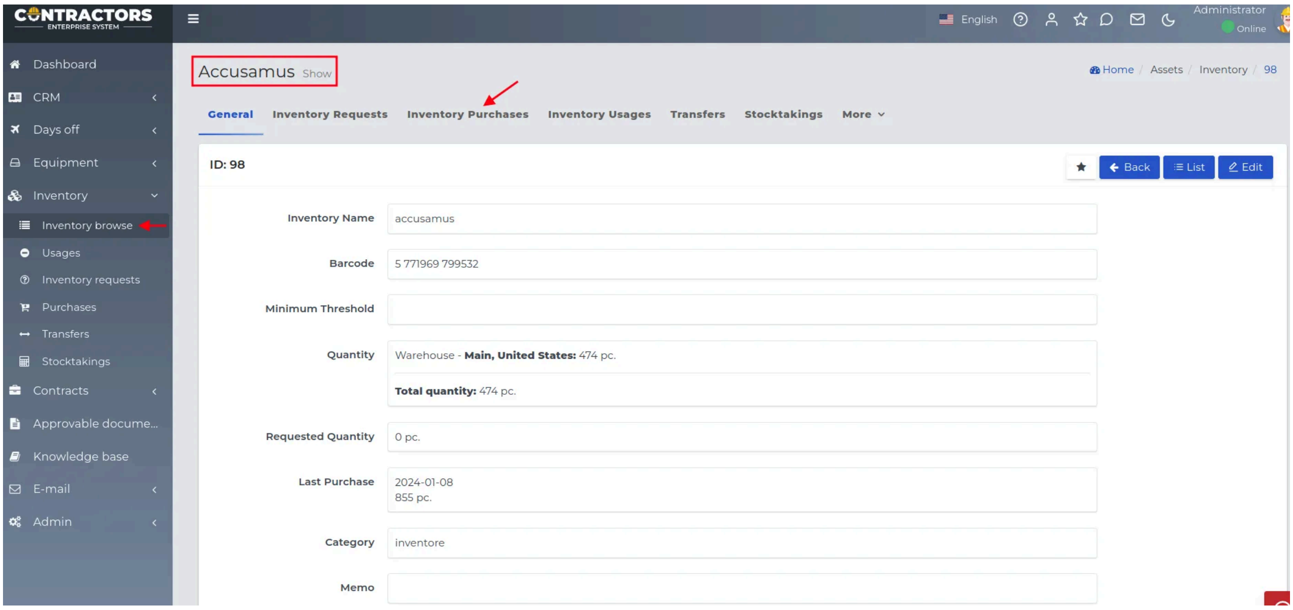
Depending on the selected system functionality, various tabs may be available in the record view. You can navigate to other records corresponding to other system functions through them. Such records are related to each other by some relationship, for example, goods and the order of goods.

An example illustrating the possibility of navigating between system functions through tabs in records:

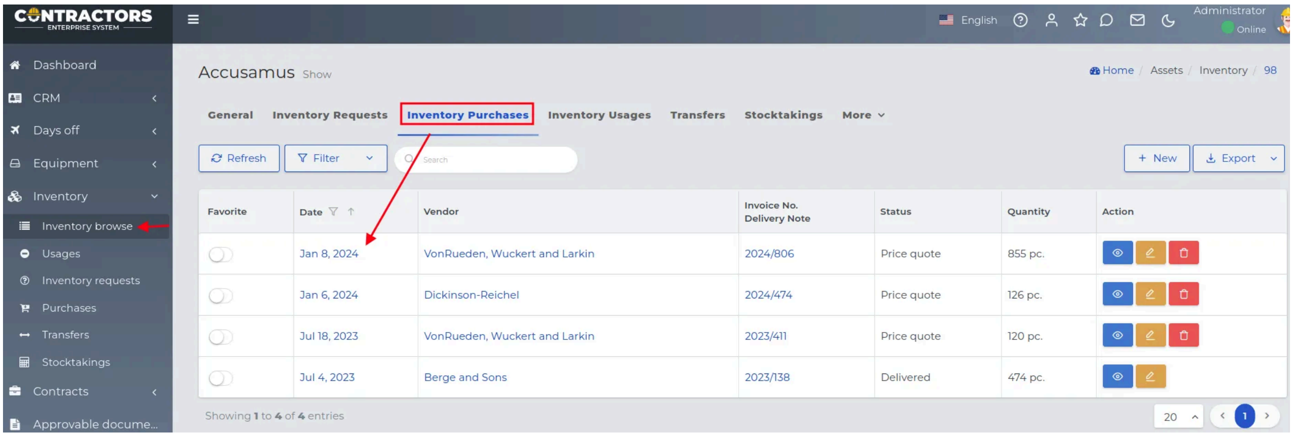
1. Go to the system section “Warehouse -> List”.

2. Select one record from the available materials and click on its name.

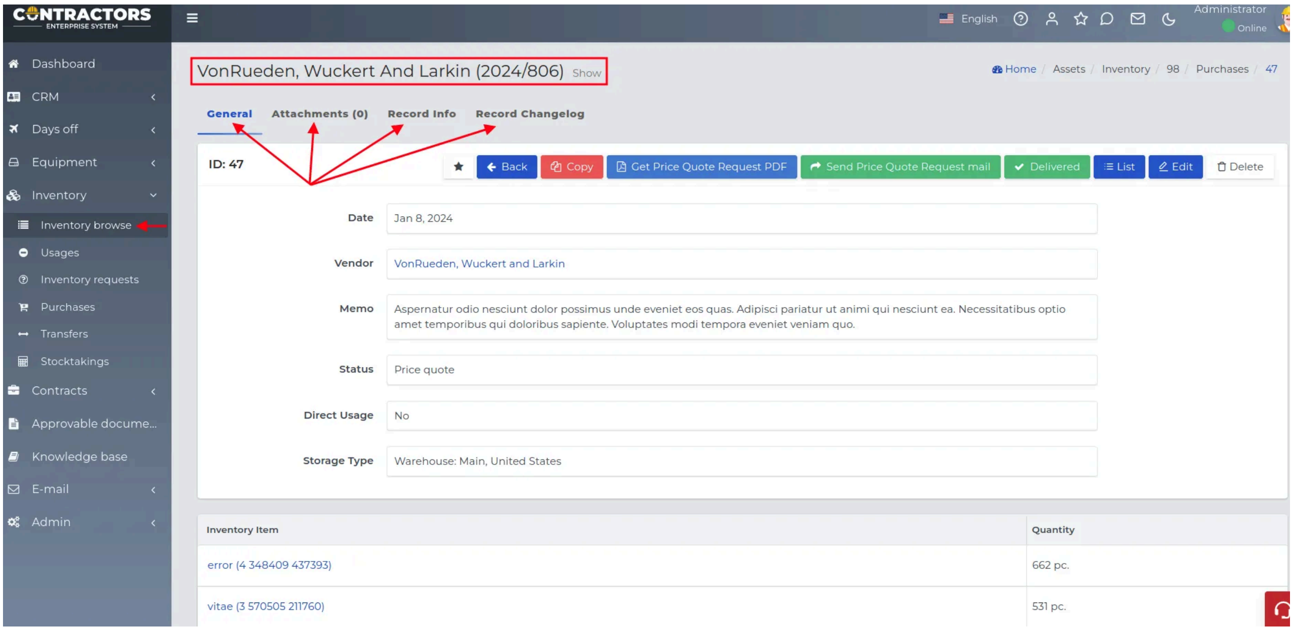
3. Go to the “Purchases” tab in the preview of the selected record.



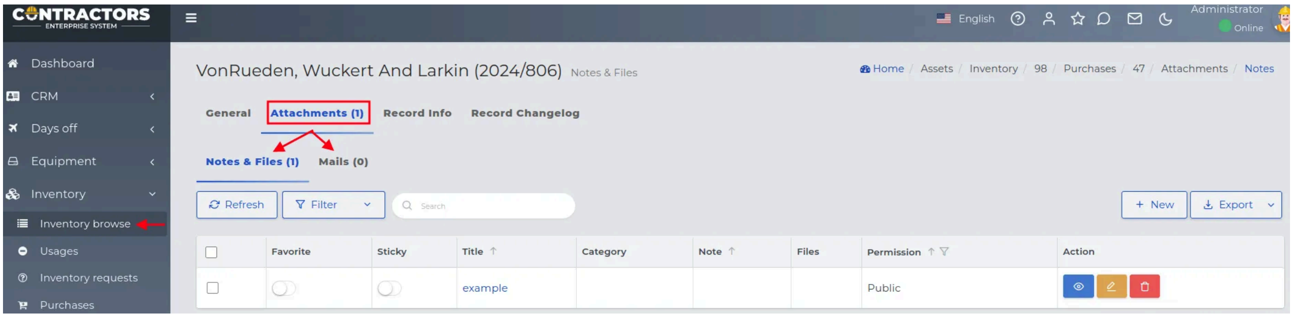
4. Choose any order from the available records.



5. Notice that you still have access to four additional tabs in the order preview.



6. After selecting one of these tabs, sub-tabs assigned to it will appear.



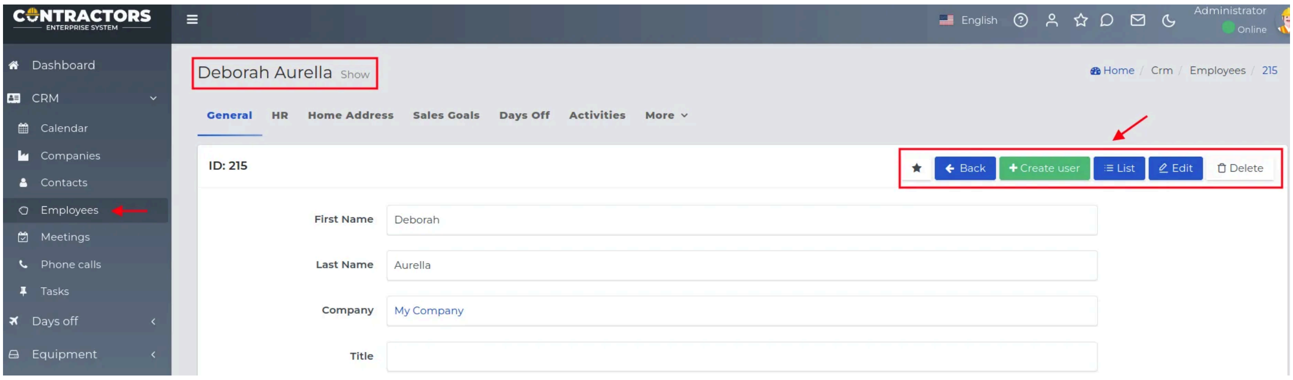
7. For the last sub-tabs in the hierarchy, only buttons for basic interaction will be active.

> **REMEMBER:** The number of all visible tabs after selecting a record from the list will not be identical everywhere. However, their functionality will remain the same.

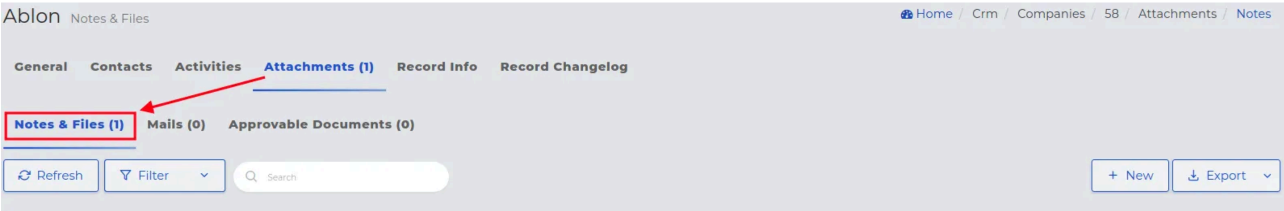
Standard tabs available in different types of records

Names of system tabs that are visible in many types of records:

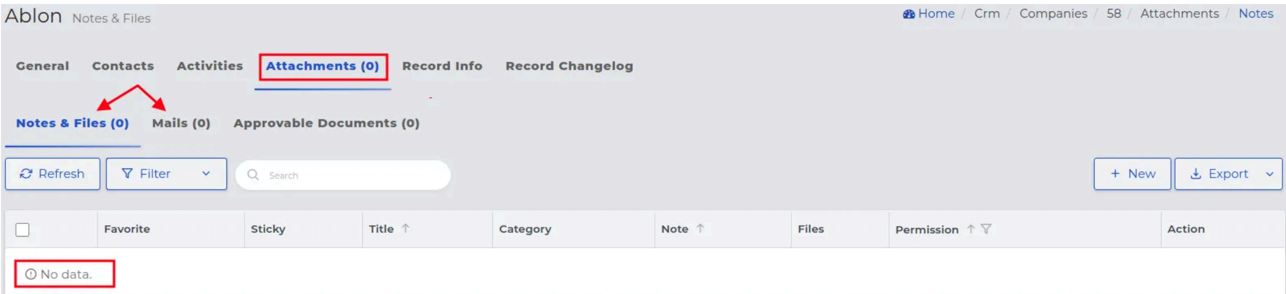
- **General** - basic data entered during the creation of the record. In the created entry, we can use auxiliary buttons, described in more detail here.



- **Attached** - all notes, files, emails, and acceptable documents related to the entry.



> **NOTE:** The number of attachments to the record is indicated by the number in parentheses according to the description in the screenshot below.

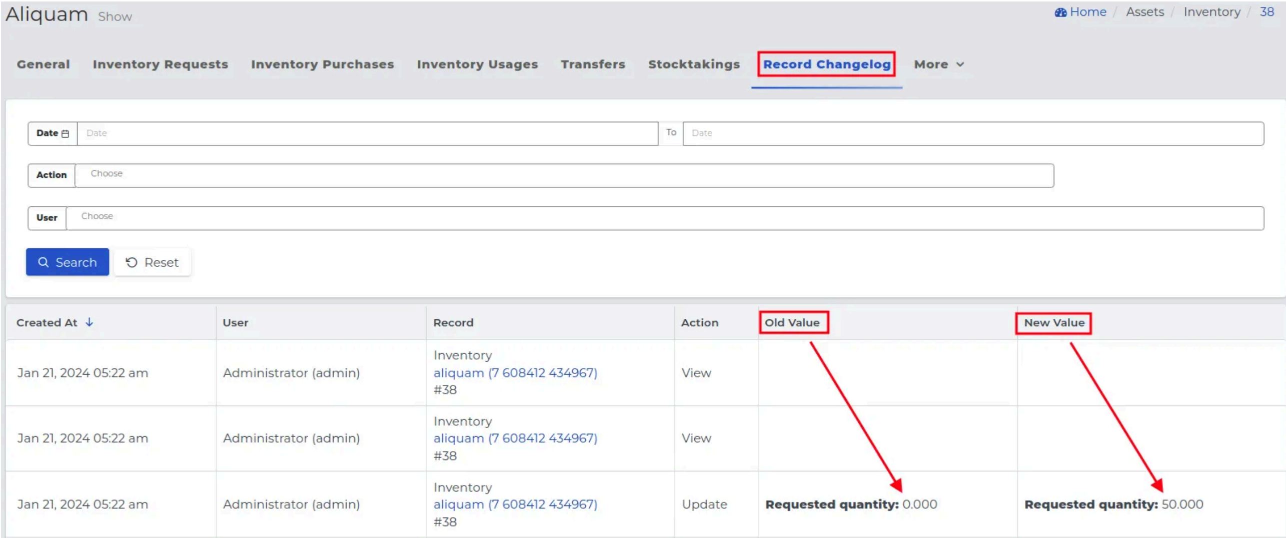


- **Information** - user data of the system who created or last updated the record.

> **NOTE:** These entries are not editable.

- **History** - a chronological record of all changes made to a given record. The system indicates which field values have been changed, by which user, on what date, and at what time.

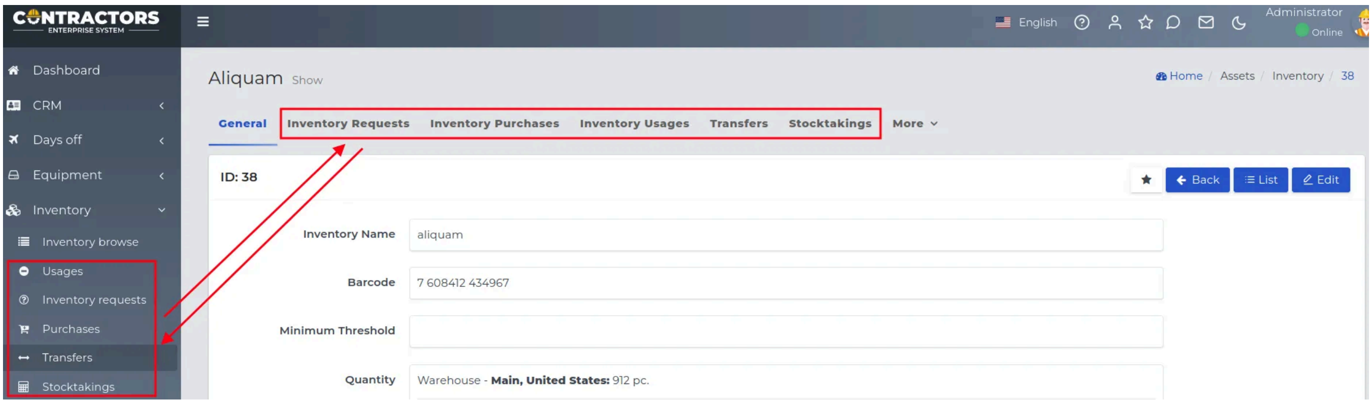
> **NOTE:** Saved values are not editable, but they can be filtered.



Tabs depending on the type and purpose of the record

The system has a number of different tabs, depending on the type and purpose of the currently displayed record.

> **NOTE:** Not all tabs present in the system have to be available for every record. Different modules may present unique sets of tabs depending on the specifics of a given type of record. An example diagram showing such a dependency is visible in the screenshot below.

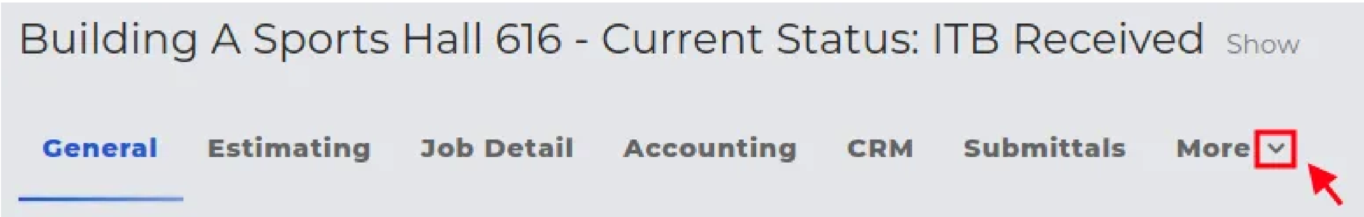


Examples of tabs that may appear in a module where at least one possible dependency between system records has been defined:

- **CRM -> Companies:** Contacts (past and current contacts), Activities (tasks, phone calls, meetings).
- **CRM -> Contacts/Employees:** HR, Home Address, Days Off, Salary, Activities (tasks, phone calls, meetings), Equipment, Assessments.
- **Equipment -> List:** Rentals (pickup orders, requests for equipment extend request), Service.

- **Warehouse -> List:** Demands, Purchases, Expenditures, Transfers, Inventories.
- **Contracts -> Projects:** Estimation, Details, Accounting, CRM (tasks, meetings, phone calls), Changes in projects, Invoices, Costs, Material Verification, Requests for Information, Planner (history, summary, daily reports), Subcontractor Agreements, Project Visits, Estimation Accuracy and Work Progress, Issues (problems, weather-related problems), Equipment (rental registry, extend requests, pickup, demands), Warehouse (inventory, expenditures, demands), Reports (time balance, financial balance).

> **REMEMBER:** The tab named “More” allows you to expand the full list of tabs assigned to the selected module on the list.



For the listed types of system tabs, their functionality has been described in the individual sections concerning selected system modules.

E-mails

Email correspondence, along with telephone conversations, practically constitutes the first form of communication with both potential and regular clients. To enable this form of contact, it is necessary to configure an email account in the system.

Email Configuration in the System

Contractors.es allows for easy configuration of multiple email account names, regardless of the number of departments in the company and the number of people using these accounts.

> **NOTE:** Adding an email account for other users can only be performed by an administrator.

> **REMEMBER:** The purpose of email configuration is solely to read and archive incoming messages. Replying to incoming messages and creating new ones is done through an email program (Outlook, Thunderbird, mobile phone app) or through the web page of the email provider.

You will carry out the email configuration according to the following scheme:

1. Go to the system section “Email → Accounts”.
2. Select the “New” button and fill out the form displayed on the dashboard, paying attention to the fields:
    - **User** - List of users who have access to this mailbox. The field is automatically filled with the data of the logged-in user. The administrator can set up a common mailbox for many users or set up a mailbox for another, single employee.
    - **Email address** - the email address name that the user will use through the Contractors.es system.
    - **IMAP server address** - IMAP incoming mail server.
    - **Login** - login required to log in to the IMAP server.
    - **Password** - a string of characters or letters securing access to the email mailbox.
    - **Connection security** - type of encryption required by the IMAP server.
    - **Type of authorization** - the way the IMAP server authorizes the user.
    - **Server port** - the IMAP server port number specified by the email provider.
    - **Verify the correctness of the SSL/TLS server certificate** - check if the security certificate used by the IMAP server is valid, current, and correctly configured.
    - **Skip folders** - a list of folders that are to be omitted during the import of messages from the mailbox.

> **NOTE:** Depending on the hosting where the email is located, the data will be different. You need to find them in the help section of the email service you are using.

Example: The parameters for configuring email in the “Outlook.com” (Microsoft 365) service can be found on the page: [POP, IMAP, and SMTP settings for Outlook.com - Microsoft Support]

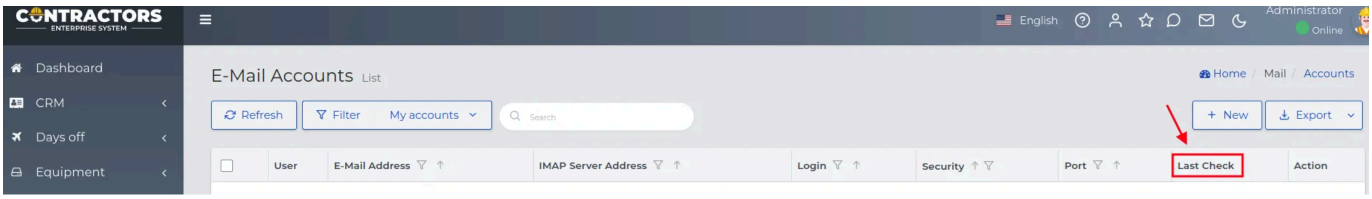
REMEMBER: The type of authorization specified in the form defines the procedure and security of logging into the mail. The system allows configuration in two ways:

- **Password login** - remembers the password entered in the form.
- **oAuth login** - works on the principle of tokens, which are used to confirm identity and access rights. It does not require storing the user’s password on the server.

NOTE: Verifying the correctness of the certificate ensures that the connection is secure and protected against man-in-the-middle attacks. If the certificate is not valid, using the selected email service may involve risk.

REMEMBER: Folders with messages that are skipped during import can be added using the “New” button located under the list with their names. The system by default sets folders named “Trash”, “Junk”, “Social”, “Spam”, “Deleted”, and “Drafts” as skipped.

3. Save the data entered into the form with the “Confirm” button.
4. The newly added email account will appear on the list of records in the “Email → Accounts” section. Each last check of the available number of new messages on the server is recorded by the system and noted in the column marked with a red arrow in the screenshot below.

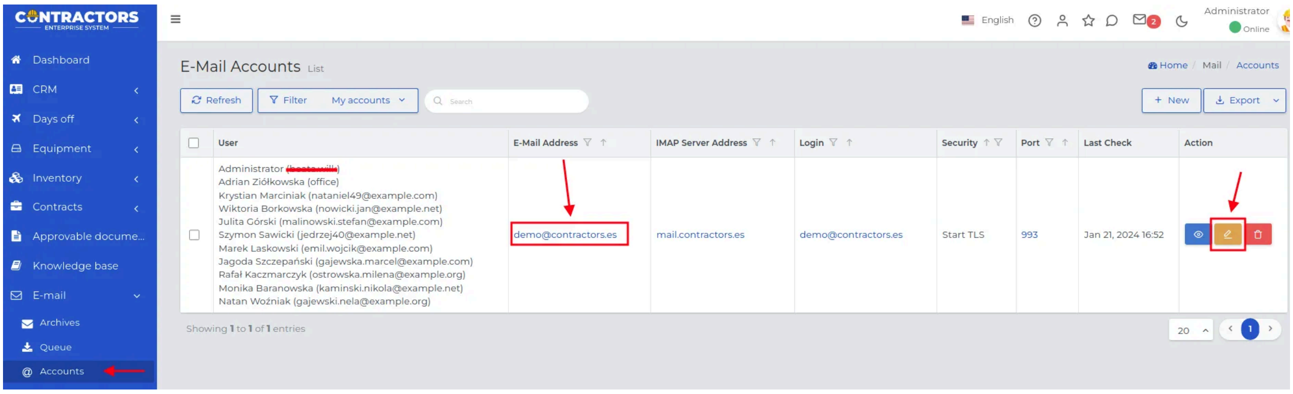


Adding users to the mail

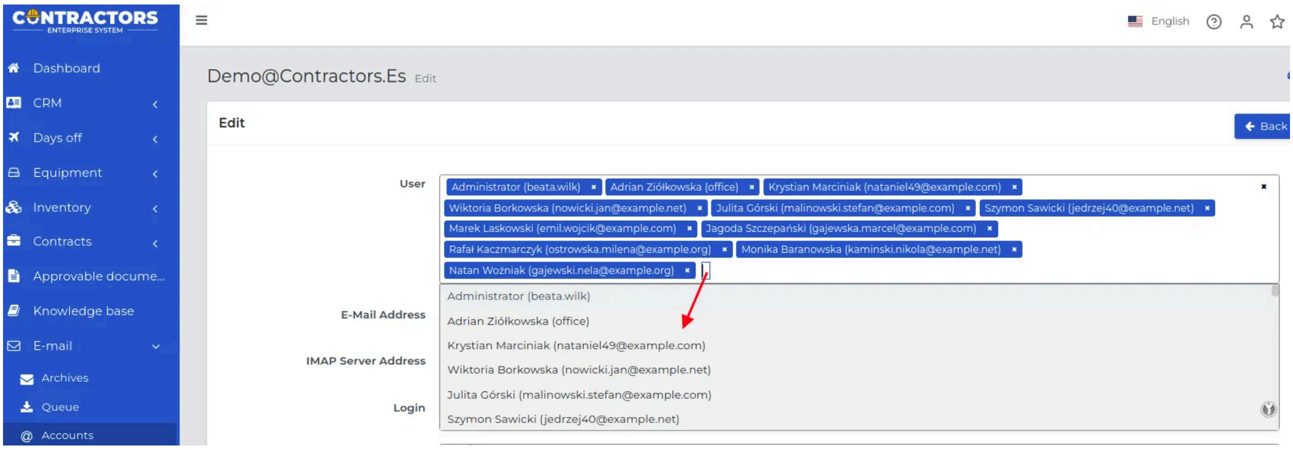
Employees sharing one email box can be assigned to a specific mailbox in a simple and quick way. There are two ways to do this:

Editing an existing email box:

1. In the “Email → Accounts” section of the system, select the record with the email name to which you plan to assign other users.



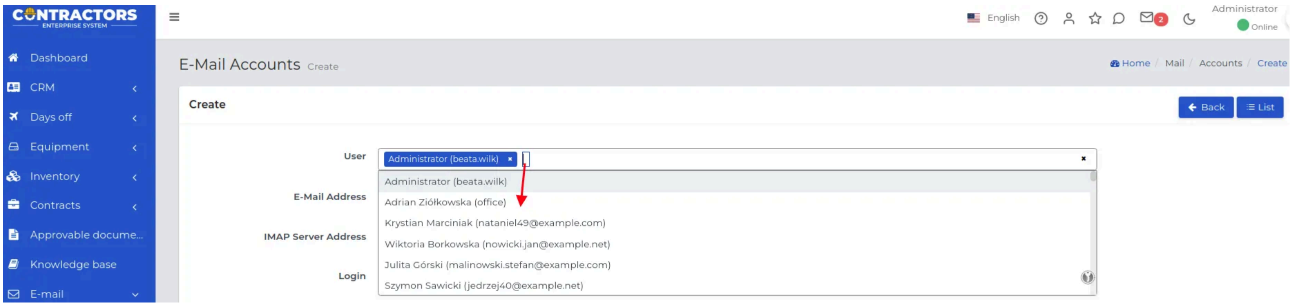
2. Click "Edit", select additional people from the "User" list and share access to the selected email with them.



3. Check the remaining fields in the form and save the changes with the "Confirm" button.

Adding a new email mailbox:

1. In the email import form, immediately select people from the list who are to have access to it.

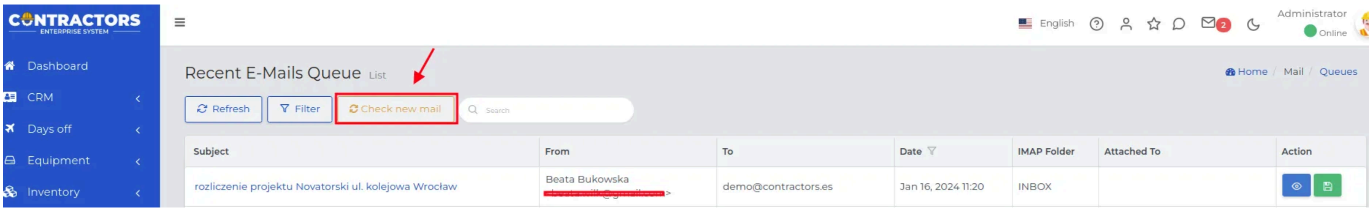


2. Continue as described here and save the form with the "Confirm" button.

Email Queue

The list of emails in the "Email → Queue" module is not visible until they are processed by the system. Messages are automatically retrieved by the server at specified intervals.

> **REMEMBER:** To force check for new emails, use the "Check for new emails" button.



The email queue regularly and automatically updates the list of messages on the email mailbox, making it easier to track the latest messages and archive them.

> **REMEMBER:** The graphic symbols next to the email icon on the top panel change depending on the status of the messages being processed on the server.

- **Red circle** - indicates the number of unread messages on the server.

- **Blue circle** - represents new messages from the last five minutes on the mail server, including incoming and outgoing messages. Messages belonging to groups named “Skip folders” are excluded from the list.

Email Archiving

Email archiving involves moving or storing messages in a way that allows them to be easily found and read in the future.

The email archiving feature in Contractors.es aims to:

1. **Preserving Communication History** - Archived messages can be easily found in the future, allowing for tracking the history of correspondence related to a project, person, or company.

2. **Increasing Data Security** - Minimizing the risk of losing important information by additionally storing them in the Contractors.es application.

To archive messages found in the email list, follow these steps:

1. Go to the mailbox using the icon marked below, located at the top of the screen or through the “E-mail → Queue” module.

2. Select the message you want to move to the archive from the list of visible emails and click the “Archive new email” button.

3. A form will appear on the screen to configure the destination for archived messages. Fields can be filled with values from the dropdown list, which concern:

    - **Record Type** - the type of record with which the content of the selected email on the list is associated, e.g., Companies, Contacts, Warehouse, and Projects.

    - **Select Record** - the specifically chosen name among those available for the specified type of record above, e.g., Companies -> Spostex S.A. or Warehouse -> Concrete or Projects -> Łomianki Playground Construction.

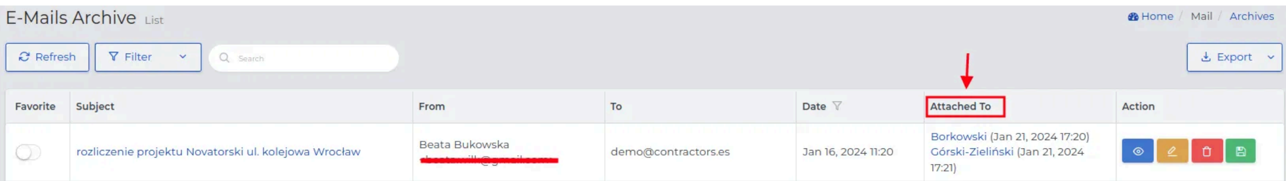
        > **NOTE:** If the content of the message contains a company name that matches the one entered in the Contractors.es system, the system will automatically fill in the fields in the form for related records, e.g., “Spostex S.A.”. However, it is worth manually verifying these fields.

    - **Only for users with roles** - the ability to determine the group of users who should have access to the attached email message, e.g., office worker, foreman, or project manager. If the email is to be visible to all users, leave the field with this name empty, without making a selection from the list.

        > **NOTE:** If a user does not have access to the record to which the email is archived, they will not be able to read the content of that message.

4. Save the changes by clicking the “Confirm” button.

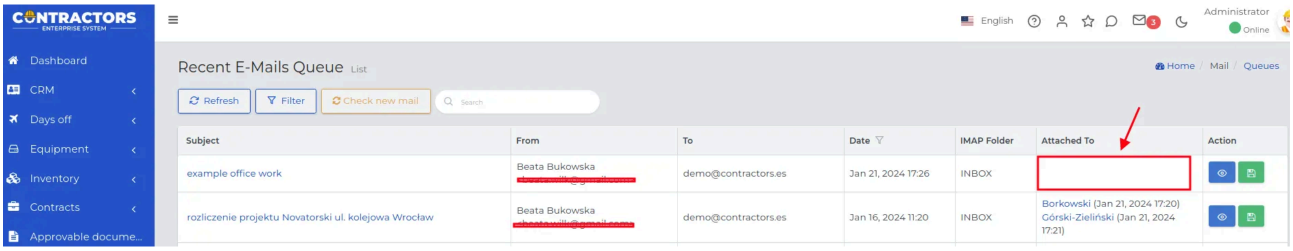
5. The selected email will be moved from the queue to the list of records in the “Email → Archives” module. In the “Email attached to” column, you will find information about the place to which it has been attached.



> **NOTE:** Archived messages remain visible in the “Email → Queue” module for 30 days after being downloaded from the server. During this period, they can still be archived to other records in the system.

> **REMEMBER:** After archiving a message, you should edit it in the archive to change who has access to its content. In the next archiving of the same email, the “Only for users with roles” field will not be available.

> **NOTE:** Emails that are in the queue, without a designated place in the "Email attached to" column - have not yet been archived.



> **REMEMBER:** Each message occupies disk space only once, regardless of how many records it has been attached to.

Attaching an email to a record

Messages moved to the "Archive" can be associated with other records in the system, making their content visible to those linked records. You can attach emails to records in the system in three ways:

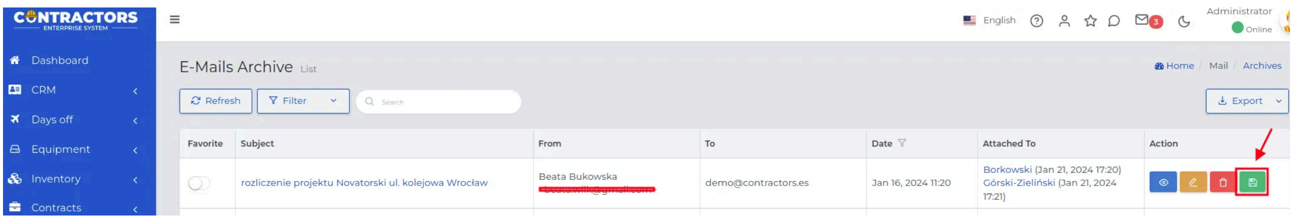
Method I:

1. Go to the "Email → Archives" module and select the message you want to attach to a selected record in the system.

> **NOTE:** Attaching emails to other records is only possible after previously archiving those messages from the queue.

2. Click the "Attach this email to another record" button.

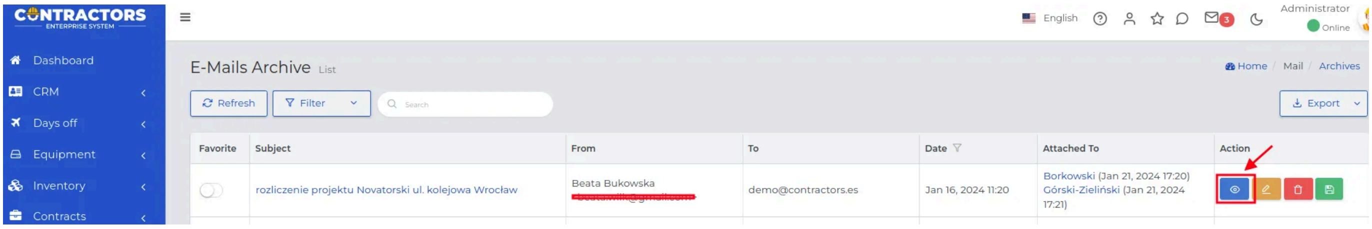
> **REMEMBER:** In the column named "Email attached to" you can see the records to which the selected message has already been previously attached.



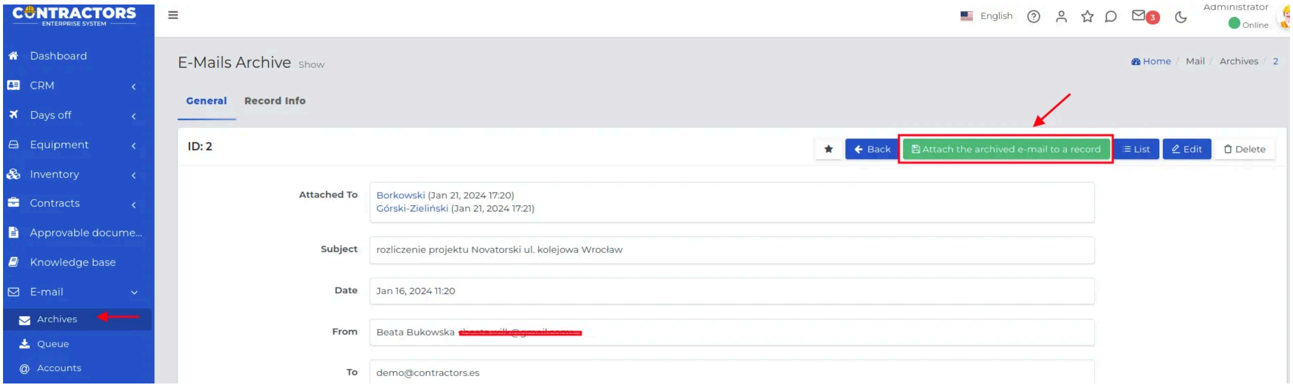
3. Fill out the displayed form according to the scheme described here and save it by clicking the "Confirm" button.

Method II:

1. With the selected message in the "Email → Archives" module, use the "Display" button.



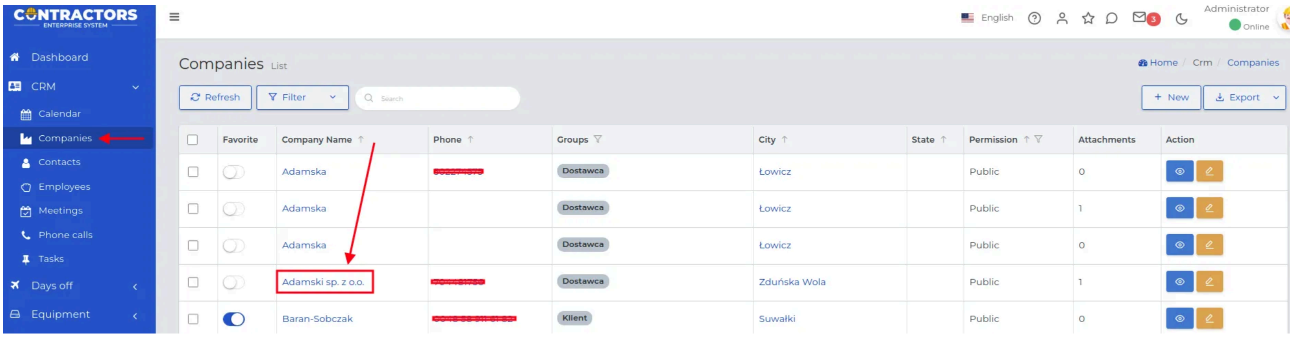
2. In the email preview, click the “Attach to another record” button.



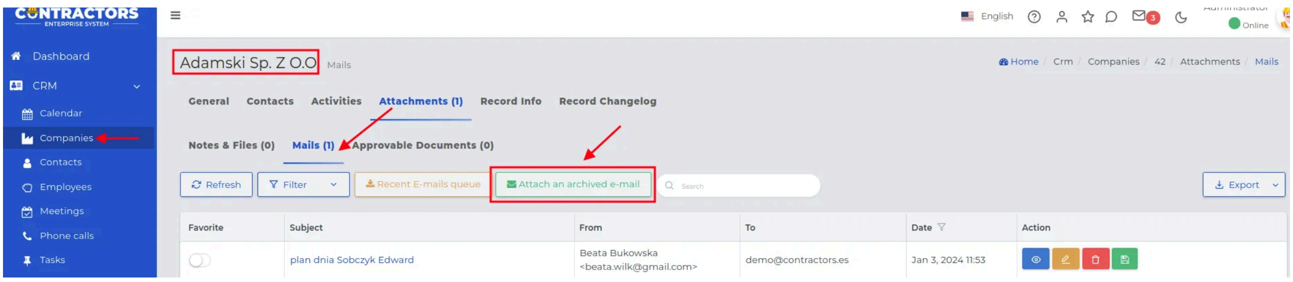
3. Fill out the displayed form according to the scheme described [here] and save it with the “Confirm” button.

Method III:

1. Select the destination in the system to attach an email from the archive e.g., CRM -> Companies -> Adamski.



2. Click on the name of the selected company and after displaying its preview, select the “Attached - Emails” tab.

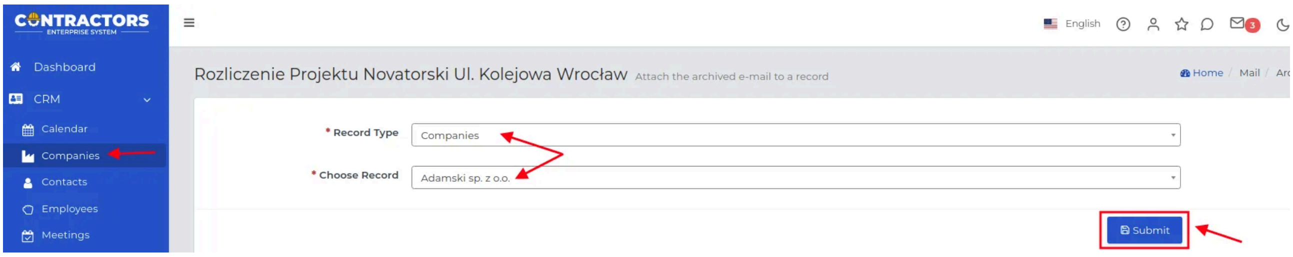


3. Choose the “Attach archived email” button.

4. From the list of archived messages, select the one you want to pin to the Adamski company record.

5. Click the “Attach this email to another record” button.”

6. The form fields will be automatically filled with the data of the record you are currently in.

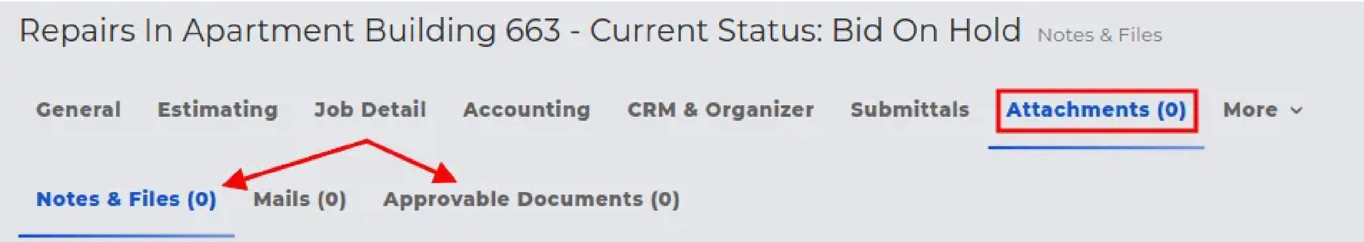


7. Verify their correctness and save the changes with the “Confirm” button.

Notes and Documents

Adding various notes and documents is meant to facilitate the management of information and documentation within the system. These can include, among others, projects, technical documentation, photos of damages, service reports, test protocols, as well as any other documents that facilitate communication within the team.

Notes, files, and documents are visible in the record preview under the "Attached" tab.



> **REMEMBER:** By attaching documents and files to records, system users have easy access to the necessary data, which helps them make appropriate decisions based on complete documentation.

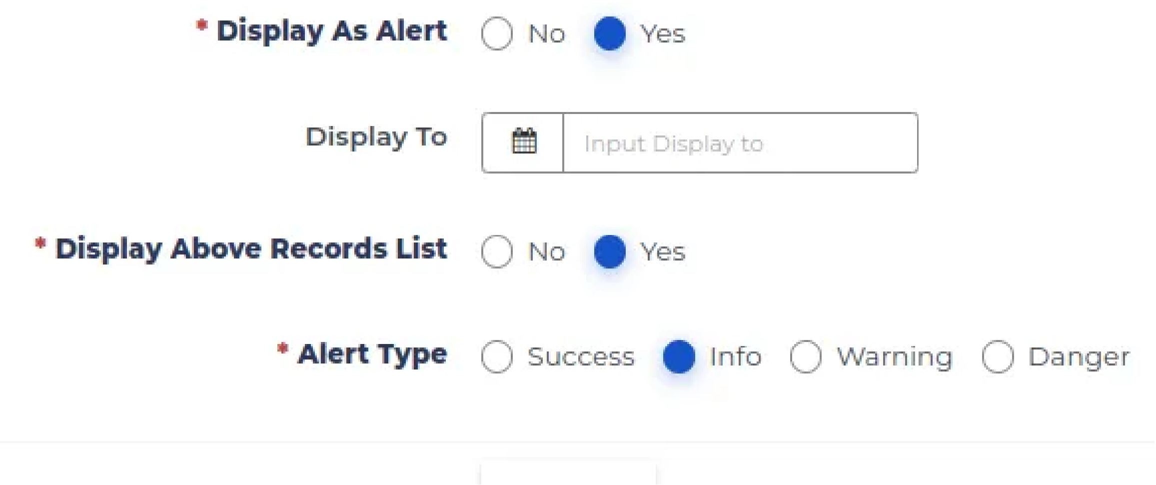
Adding Notes and Files

To add notes and files in system records, follow these steps:

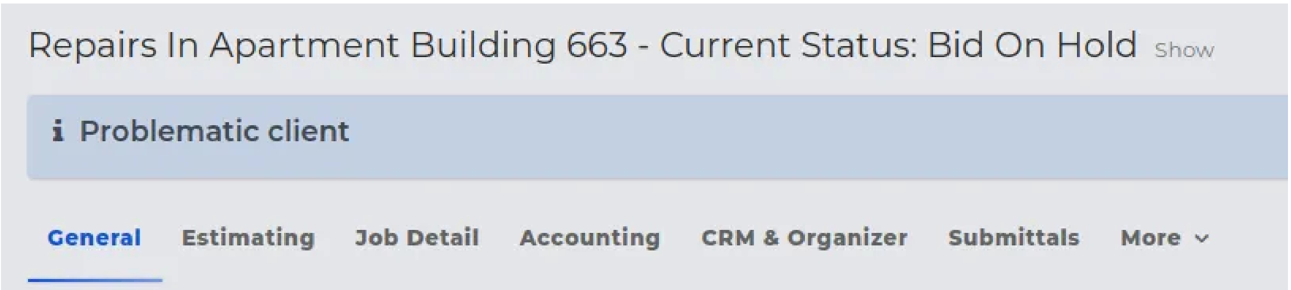
1. Go to the "Attached" tab in the selected record.
2. Select the "Notes and files" option and click the "New" button.
3. Fill out the form, paying attention to the fields:

- **Pinned:** Setting to "Active" will display the note at the beginning of the list of notes.
- **Title:** The name of the note.
- **Category:** Choose the type of category to which the entry should belong.
- **Files:** The ability to add files from the disk as attachments.
- **Permissions:** Define employee access to system records. You can find more about permissions here.
- **Display as a message:** Checking this option will display the added note as a message.

Settings regarding how the message is displayed can be determined in the further part of the form.



- **Display message until:** Defines the time range in which the message is to be displayed.
- **Message on the list:** Determines where the message in the form of a note is to be displayed, whether on the list or outside of it.
    - Choosing the option **"No"** - the message will be visible in the record preview, just below its name.



    - Choosing the option **"Yes"** - will cause the message to be visible above the list of records.

> **REMEMBER:** If you want to find out which record the displayed message refers to, click on the button marked in the screenshot above.

- **Type of message:** Determines the form of the message delivery, which is defined by the background color.

Success - green color

Information - blue color

Has connections at the city hall

Warning - white color

Takes information outside the company

Attention - red color

Exposed the company to costs

4. Save the entered data with the “Confirm” button.

Acceptable Documents

If the **administrator** has properly set up the ability to attach an acceptable document to another record (description here), then in the view of such a record in the “Attached” tab, you can add an “Acceptable Document”.

To add it, follow the scheme:

1. Go to the “Attached” tab in the selected record.

2. Choose the option “Acceptable Documents” and click on the “New” button.

3. Fill out the form, paying attention to the fields:

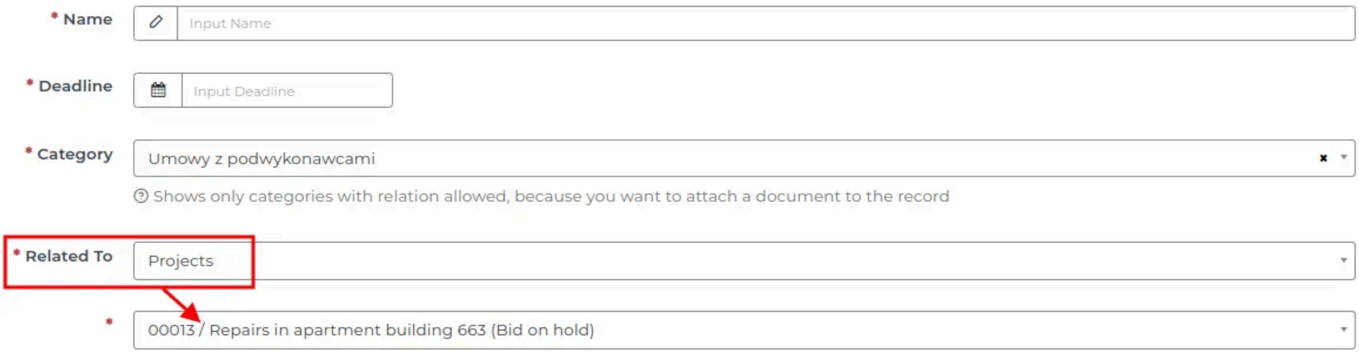
- **Name:** The name of the document.

- **Acceptance deadline:** Specifies the date by which the document should be accepted.

- **Category:** Determines the type of document.

> **NOTE:** Since you want to attach the document to a record, only those document categories for which a link created by the **administrator** is displayed.

The system will suggest values in the subsequent fields according to the further linkage entered into the system.



REMEMBER: Acceptance of a document submitted for approval requires attaching a file or entering content.

Document Acceptance

The list of documents for acceptance only displays records associated with the logged-in user, regardless of their category. The system displays documents for acceptance with the status “Pending my acceptance”.

NOTE: Only users with the appropriate system permissions have access to the “Acceptable Documents” section.

REMEMBER: The types of document categories suggest how many approval stages the created document belonging to the selected category will have, for which settings have been set by the administrator.

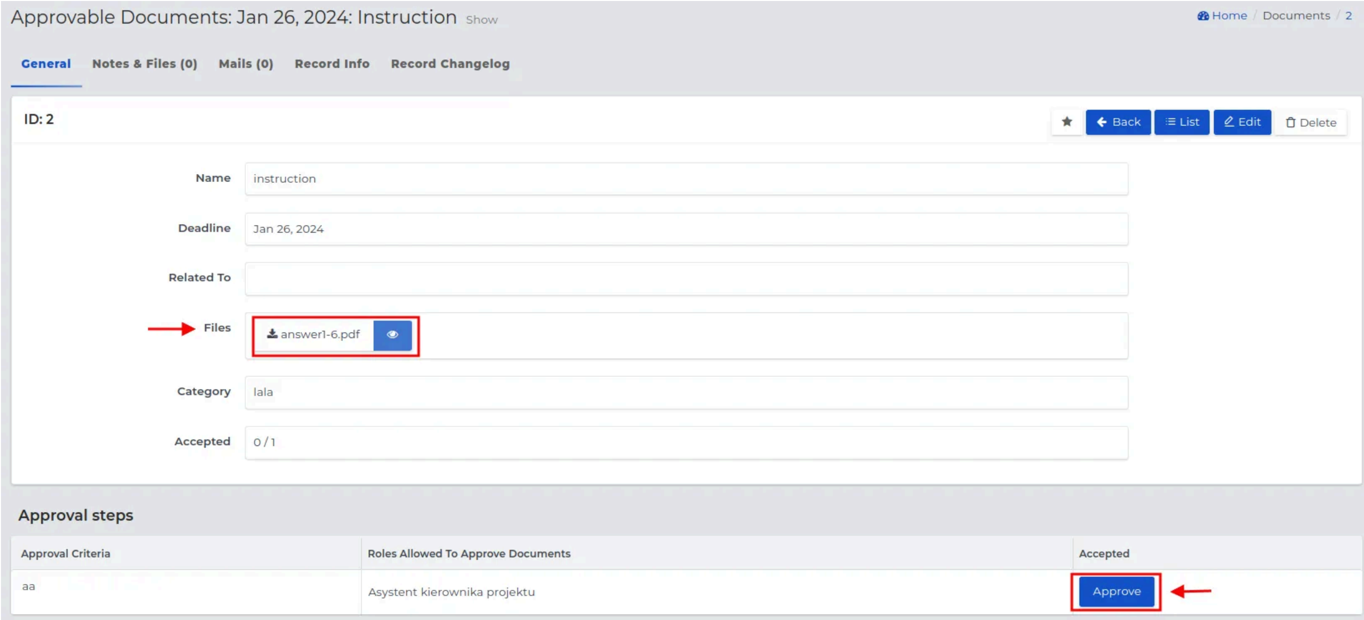
NOTE: Exceeding the deadline for document approval will result in the record being displayed with a red warning background.

To accept or reject a submitted document for approval, follow these steps:

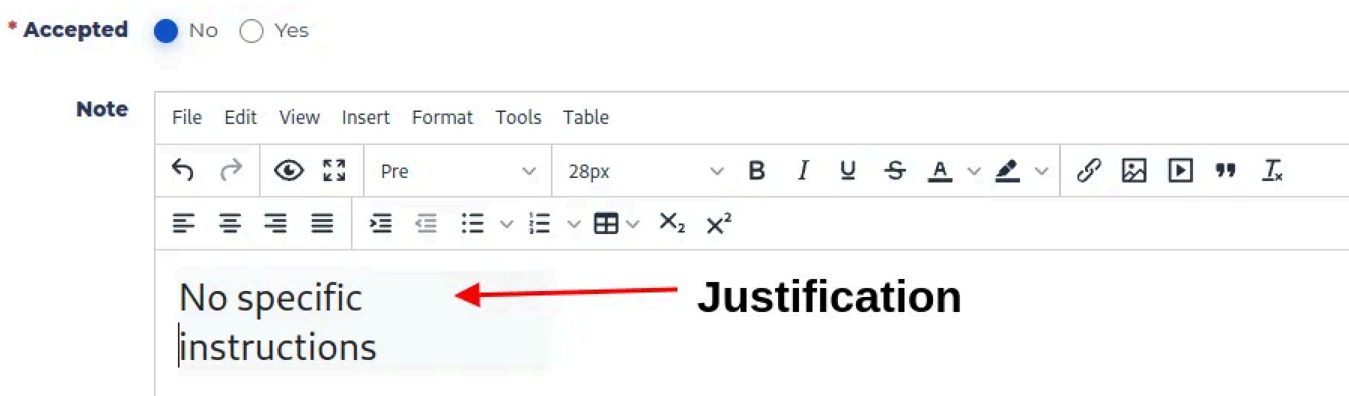
1. Go to the “Acceptable Documents” menu and select the document you want to review.

NOTE: You can add an acceptable documents applet to your dashboard to be informed about new documents.

2. Review the attached files and go to the change form by clicking the “Accept” button.



3. Determine the document status by selecting its acceptance or rejection.



REMEMBER: You can enter a justification for your decision as a note.

4. Save the changes using the “Confirm” button.

REMEMBER: Unaccepted documents are moved to “Rejected” and can be re-accepted after editing.

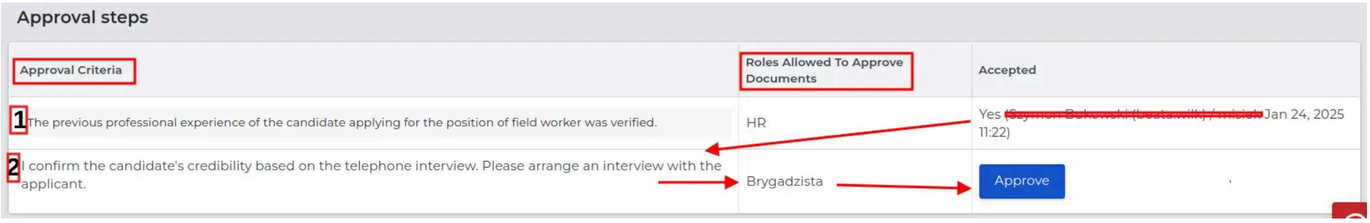
NOTE: Documents removed from the acceptance list are moved to the “Trash”, where the administrator can restore them to the list by clicking the “Restore” action button.

Multi-stage Approval Procedure

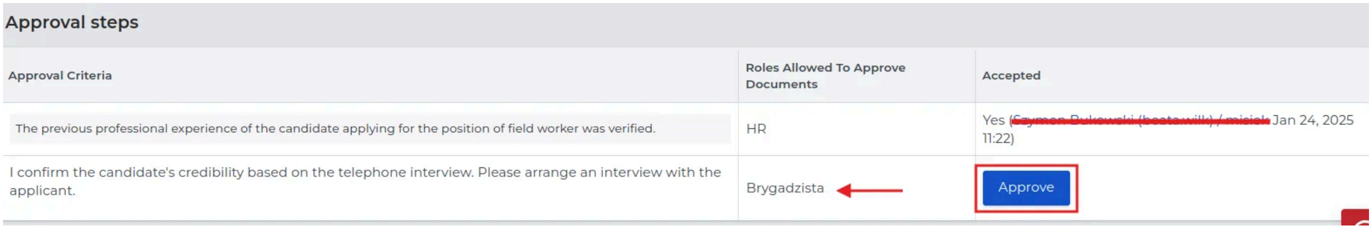
The time for document approval depends on the number of steps and the time needed for each of them, as well as on the workload and any problems.

NOTE: The steps of the multi-stage approval of a document are carried out sequentially according to the settings introduced for a given document category. Editing of approval steps has been described here.

A document requiring multi-stage approval goes in the appropriate order to the people who are marked on the list.



If the first person authorized to approve accepts the document, its status will be changed to “Accepted Yes”, and then the document will be passed on to the second person authorized to approve according to the list.



REMEMBER: The document will be fully approved when all roles on the list authorized to approve it have done so.

Dashboard

The dashboard system of Contractors.es enables effective management of customer relationships and company resources. It is a space fully customizable by the user as they decide on its appearance and content.

> **REMEMBER:** A properly set up dashboard positively affects work efficiency.

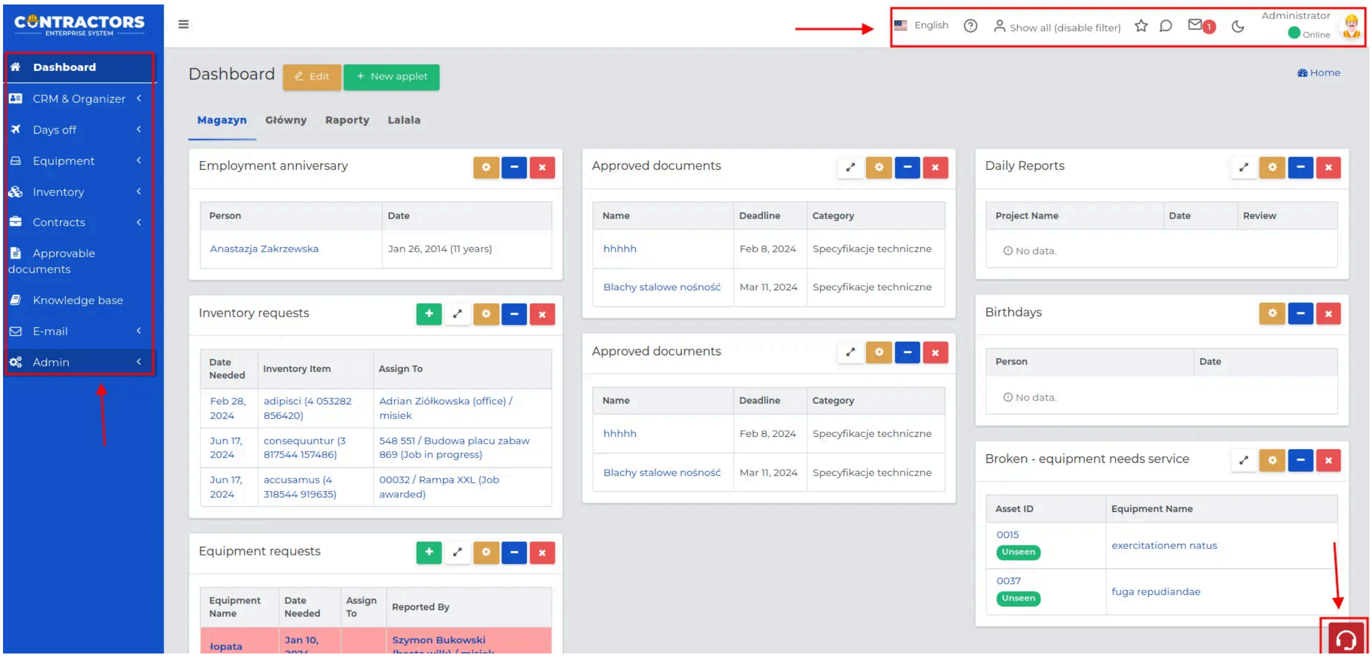
Dashboard Structure

The structure of the dashboard is the layout and arrangement of elements, such as the main view and functional buttons. Their purpose is to create an intuitive environment for the user, where they can easily and efficiently manage system functionalities, customize the dashboard to their needs, and quickly use key tools and information.

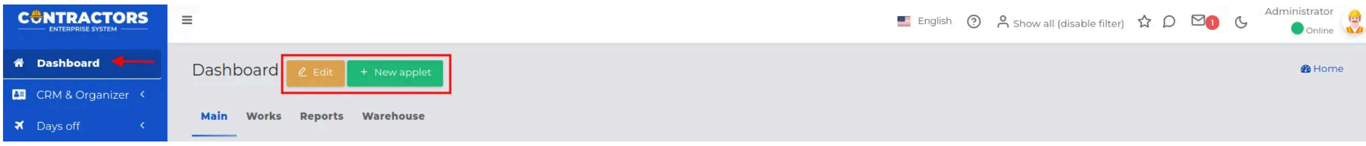
> **NOTE:** Dashboards have been configured for system roles. After the first login, the user has a customized dashboard according to their assigned role in the system, and they can later modify the data according to their own needs. The administrator can modify the templates assigned to roles by editing them.

Always visible on the user's dashboard are:

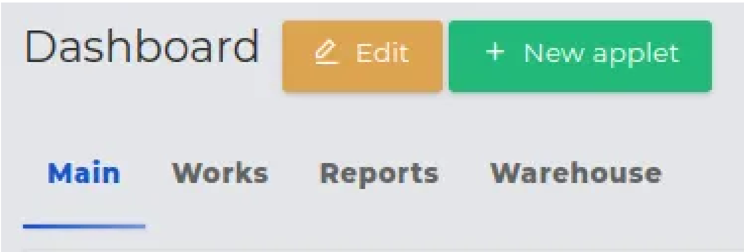
- Interface panels: side menu and top bar.



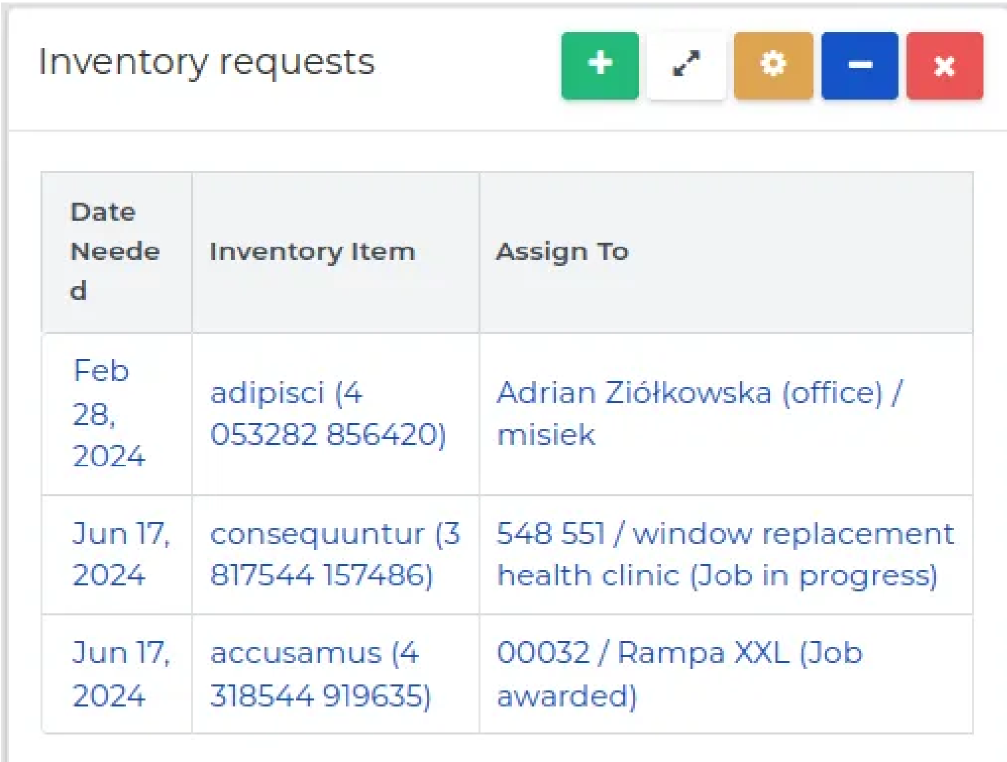
- Functional buttons.



- Dashboard tabs.



- Applets.

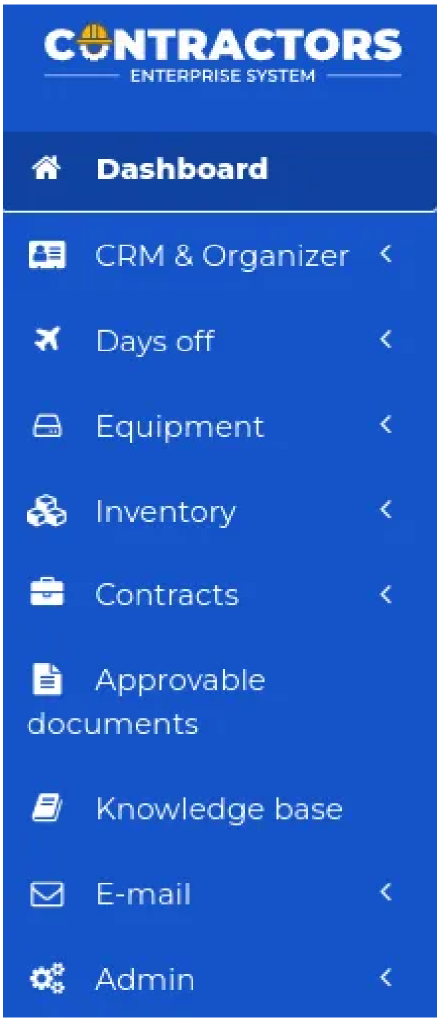


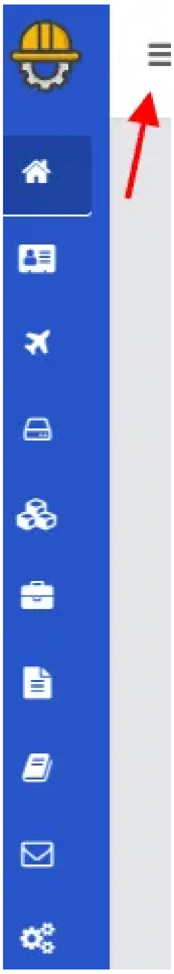
> **REMEMBER:** The appearance of the sidebar, i.e., the color in which the list with system modules is to be displayed, belongs to the administrative settings.

Interface Panels

Interface panels are areas on the computer screen that gather and present various functions, tools, or information for the user. They facilitate access to system functions, helping in the intuitive use of the software. In the system, there is a side panel and a top panel.

The side panel in Contractors.es is called the menu, which contains the available system functions. Each tab, marked with a ”<” symbol, focuses on subcategories of a given module.


CONTRACTORS
ENTERPRISE SYSTEM
Dashboard
CRM & Organizer
Days off
Equipment
Inventory
Contracts
Approvable documents
Knowledge base
E-mail
Admin



> **REMEMBER:** To increase space on the dashboard, you can use the menu collapse function (marked with a red arrow). Office icons will remain visible, and upon hovering the cursor again, the menu will expand to its initial width.

The Top Panel provides quick access to user account settings.

Icons in the top panel include:

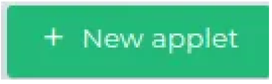
- Changing the language in the software (Polish, English).
- Going to the help section, which describes the system functions and settings.
- Filtering the CRM module by a different employee or entire contact groups. The way to create groups by which you can filter has been described here.
- Notifications about new entries in records marked as “Favorites”.
- New incoming messages on the company’s internal messenger, i.e., the so-called “Chat”.
- Notifications related to the appearing number of email messages.
- Changing the screen display mode according to the “day → night” principle.
- User account settings and the ability to log out of the system.

Functional Buttons

Functional buttons facilitate quick access to key system functions. There will always be two functional buttons visible on the dashboard, whose meanings are as follows:

1. Allows editing the settings of dashboards and applets on them.

2. Allows adding a new applet to the dashboard with specifying its location and appearance.

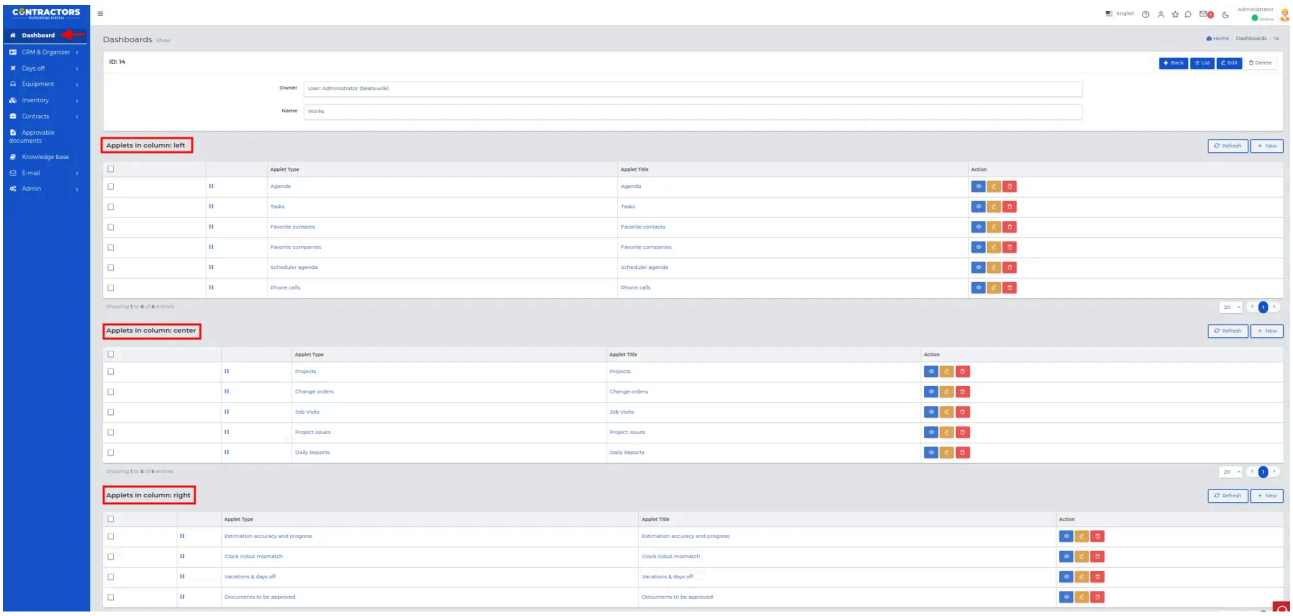


> **REMEMBER:** Depending on user permissions, they may not have access to all types of applets.

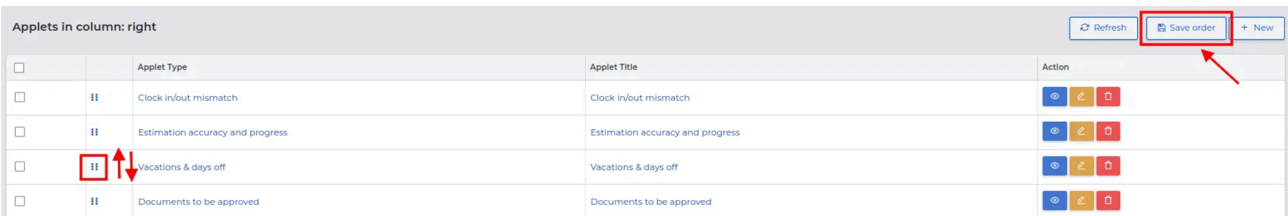
You can edit the layout and appearance of applets on your dashboard as described below:

1. Select “Edit” on the dashboard, then use the “Display” button or click on the tab name, e.g., “Main”.

2. A list with the names of applets for which their position on the dashboard has been specified will be displayed: left column, middle column, and right column.

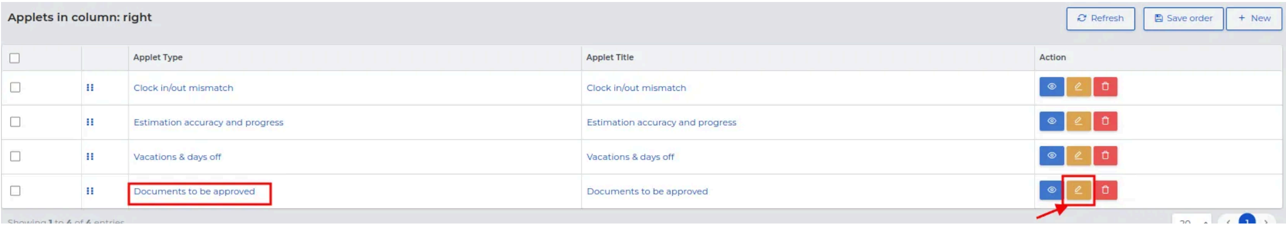


3. Adjust the order of the applets on the list by dragging them up or down as indicated in the screenshot below.



REMEMBER: After making changes to the order, press the “Save order” button to update the list.

4. Optionally, change the appearance of a selected applet from the list by going to its edit form.



The repeatable meaning of fields in the applet edit form is as follows:

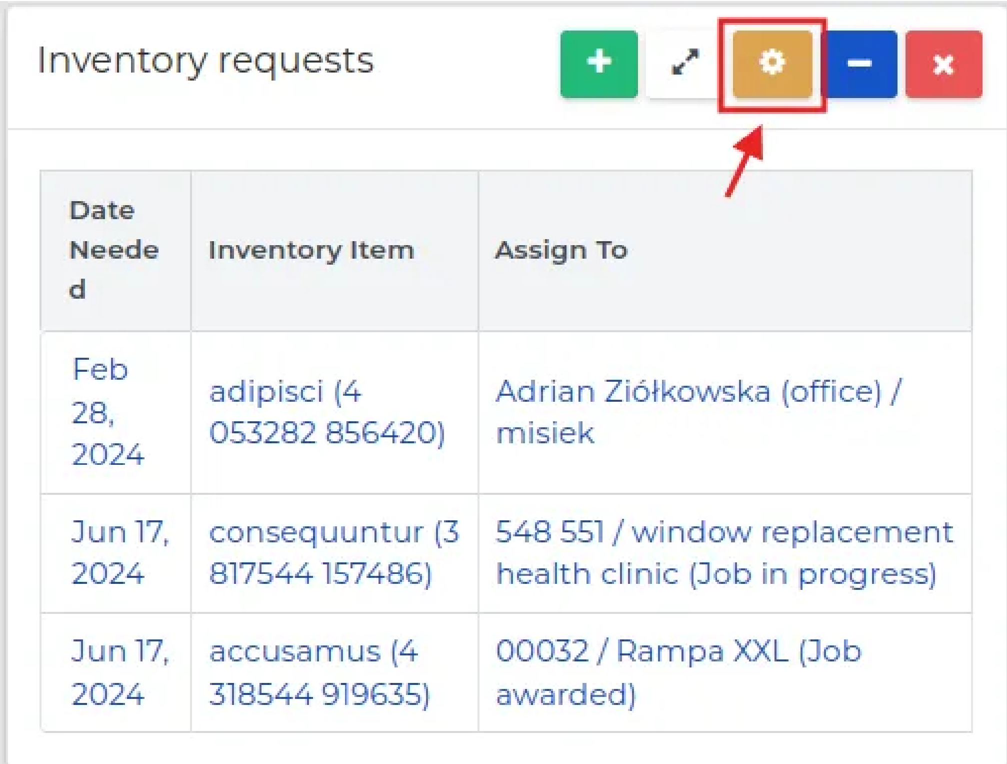
- **Applet Title**: The name of the applet. Leave this field blank to use the default name.
- **Color:** The applet frame will be marked with the selected color.
- **Column:** Changes the type of column in which the applet should be located.

NOTE: Depending on the type of applet, the fields in the applet edit form may vary.

5. Save the changes with the “Confirm” button.

NOTE: Applets can only be moved (change order) within a given tab. It is not possible to move an applet from the “Tasks” tab to the “Balance” tab. The applet’s tab can be changed by editing its settings.

REMEMBER: The fastest way to go to the “Edit” form of a selected applet is to use the “Applet Settings” function.



REMEMBER: An unnecessary applet can be removed using the “Delete” button.

NOTE: Data in the deleted applet will not be lost and will be visible again in the applet when it is re-added to the desktop.

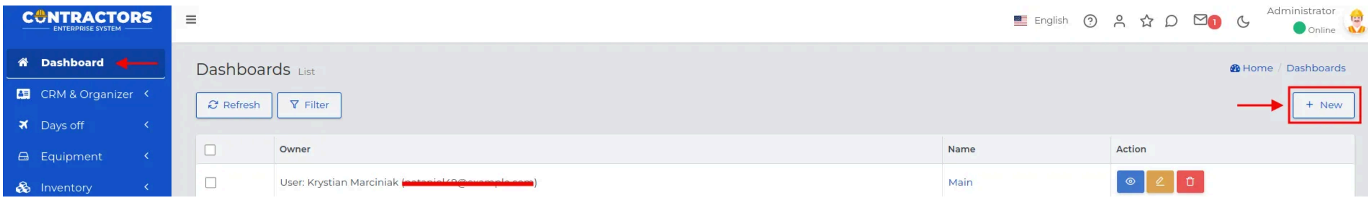
Desktop Tabs

Desktop tabs, referred to as “subsequent desktops,” allow users to customize functionality to their own needs and group applets according to their functions.

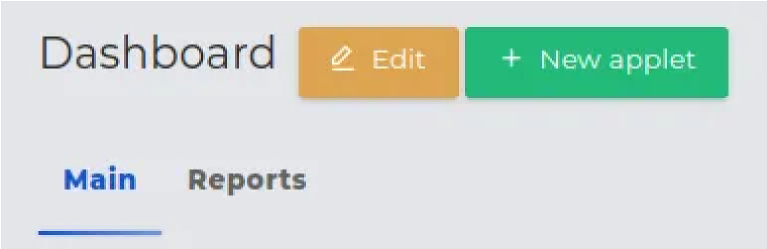
NOTE: The administrator, by creating so-called desktop templates for specific roles, adds tabs and edits settings only for new users of a specified role.

Add desktop tabs in the following order:

1. Go to the desktop edit, and then click the “New” button.



2. In the “Name” field, enter the name of the tab to be visible on the desktop, e.g., “Reports,” and save the entry with the “Confirm” button.



> **REMEMBER:** You can edit, delete, and change the order of tab names on the list by dragging them up or down.

> **NOTE:** You cannot remove all tabs from the desktop; at least one tab must remain visible. After removing the last one, a new tab will be created according to system settings.

Applets

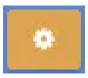
Graphical components visible on the desktop are called applets. Arranging applets on the user’s desktop allows for quick access to important functions and information, which significantly facilitates daily work and increases the efficiency of system use.

> **REMEMBER:** The way you organize applets on the desktop will affect the organization of your work. You can create desktop tabs and sort applets in them according to their purpose.

The buttons visible on each applet reflect their functions. These include:

1. Allows you to go to the full (extended) list of records.

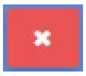
2. Displays the applet’s configuration with the possibility to make changes within it.



3. Minimizes (reduces) the applet window and hides the information contained in it.

4. Maximizes (enlarges) the previously minimized applet window.

5. Removes the applet from the desktop.



Other visible buttons depend on the type of applet and allow for additional actions to be performed within them. These include:

1. Allows you to add a new entry to the list of records.

Applies to applets: Companies, Contacts, Recently Viewed Companies, Project Issues, Phone Calls, Equipment in Service, Favorite Companies, Favorite Contacts, Favorites from the Warehouse, Favorite Equipment, Verification of Materials and Other Products Used in Realization, Project Visits, Requests for Additional Information, Requests for Deferral of Equipment Return, Tasks, Material Requirements, Equipment Requirements, Reports of Weather Preventing Work, Project Changes.

2. In the case of the Chat applet, two icons are available:

Allows changing the name of the chat and displays a list of users for that chat.

> **REMEMBER:** Thanks to the buttons available on each applet, you can easily delete or edit applets in a simple and quick way.

Adding applets to the desktop can be done in two ways:

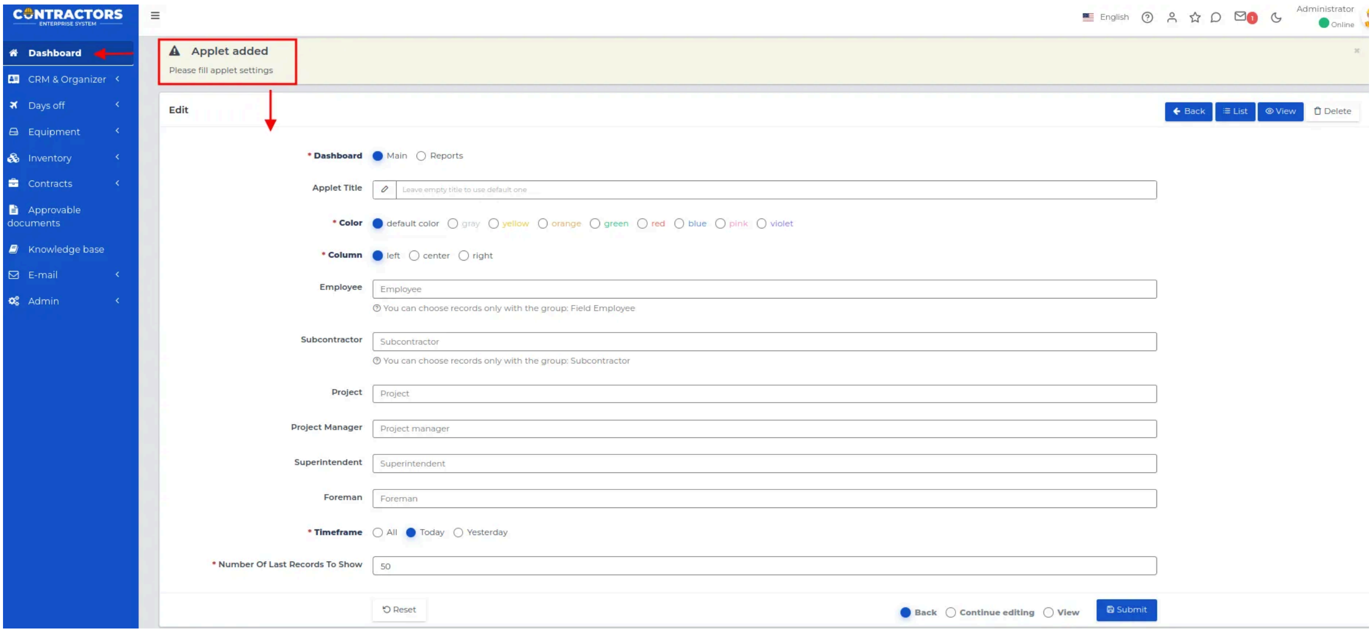
Method I:

1. Select the "New applet" function button on the desktop and fill out the form according to the meaning of the fields:

- **Type of applet:** The type of applet selected from the list.
- **Applet title**: The name of the applet. Leave this field empty to use the default name.
- **Color:** The applet frame will be marked with the selected color.
- **Column:** Changes the type of column in which the applet is to be located.

2. Save the changes with the "Confirm" button.

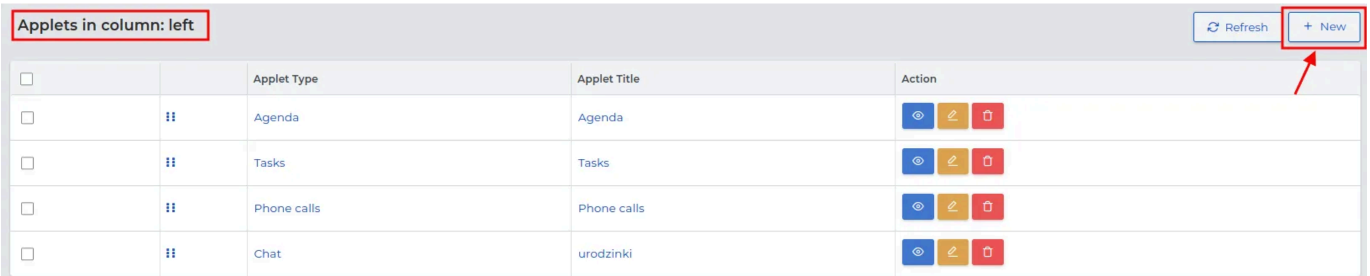
> **NOTE:** If the selected type of applet requires filling in additional fields, the system will inform you with an appropriate message.



Method II:

1. Go to the “Edit” of the desktop, preview your desktop with the “Display” button.

2. At the selected column, click the “New” button.



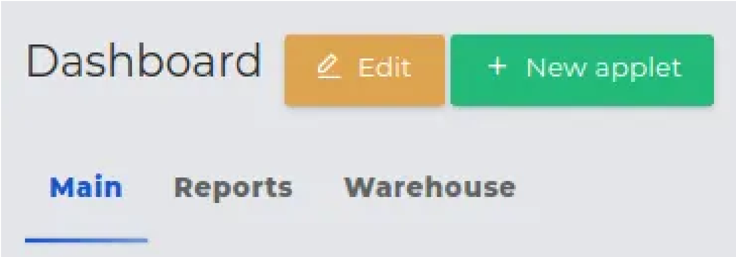
3. Fill out the form to add an applet to the desktop according to the description of the fields contained here and save the changes with “Confirm”.

REMEMBER: Added applets automatically position themselves at the bottom of the column to which they were added.

NOTE: You can move applets on the desktop, changing not only the order but also the column. Grab the applet with the cursor at the frame and drop it in the target location.

Example: Adding individual applets to two new tabs on the desktop.

1. Create two new tabs on the desktop as described here, e.g., “Warehouse” and “Reports”.

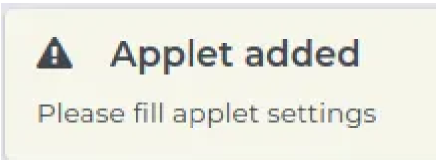


2. Add a new applet in the “Warehouse” tab, specifying in the form:

- **Type of applet:** Below minimum level.
- **Color:** red.
- **Column:** middle.

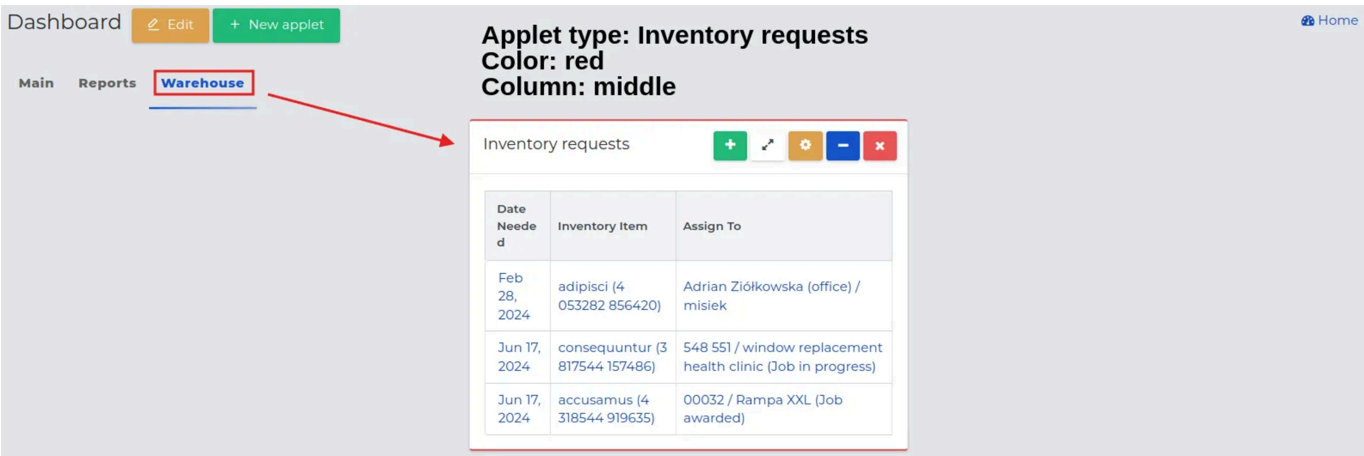
3. Save the data with the “Confirm” button.

> **NOTE:** If the selected type of applet requires filling in additional fields, the system will display a message and another form to enter further settings.



4. Proceed in the same way and save the addition of another applet in the next tab “Reports”, selecting for example Daily Reports, blue color, right column.

The preview of the dashboard tabs created in this way will be as follows:



If you want to move a selected applet from one tab to another, follow the steps below:

1. On the dashboard, select the applet you want to move, and then click the “Applet Settings” button, which allows its configuration.

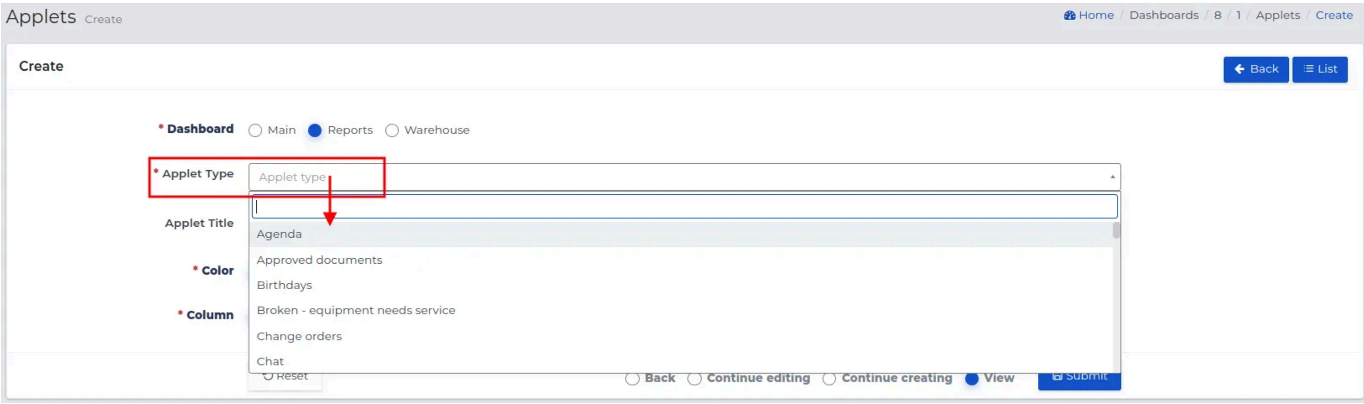
2. In the form, in the “Dashboard” field, select the name of the tab to which you want to move the applet.

3. Verify the remaining fields and save the changes with the “Confirm” button.

> **REMEMBER:** The applet cannot be dragged with the mouse cursor to another tab. You can only move applets within the same group on the dashboard in this way.

Description of selected applets

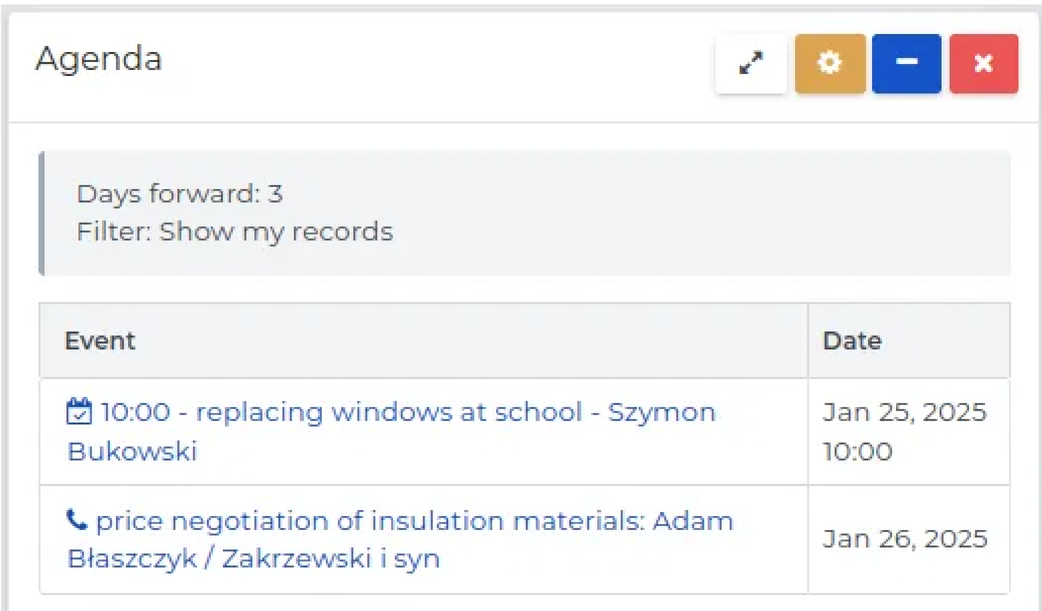
Applets available on the system list should be customized according to individual needs. It is important to select the most helpful and frequently used ones and then set them up on your dashboard. The full list with applet names is available when adding them to the dashboard in the “Applet Type” field. The names of the applets on this list are arranged in alphabetical order.



This thread will describe a few popular applets.

> **Example:** Agenda.

“Agenda” allows displaying events entered into the calendar of both ourselves and a selected employee from the list.



In the “Applet Settings”, pay attention to the following fields:

- **Days ahead** – determines how far in advance tasks entered into the schedule will be displayed in this applet.
- **Filter** – allows displaying events of a selected group of users:
  - **Show records about me** – will display only our calendar with tasks.
  - **Show all (disable filters)** – will display the calendars of all users.
  - **Group (e.g., HR, Estimator, etc.)** - will show events for the selected group of contacts provided that it has been added to the so-called "Filter List".
- **Selected person from the list** - will show only the calendar of a specific person.

> **NOTE:** You can create several "Agenda" applets on the desktop, for which you define different filters for displaying events on the list.

> **Example:** Time balance of the project work scope.

"Time balance of the project work scope" allows for reviewing and analyzing the progress of work on a selected project. The applet will display information regarding the work scope and the number of days worked, estimated, and exceeded, calculated based on daily reports sent by employees. Sometimes it may happen that the assumed number of days needed to complete the project is insufficient. Exceeding the number of days may be related to problems occurring on the construction site.

Scope of works time balance: church renovation works

Scope Of Work	Worked Days	Estimated Days	Number Of Days Exceeded
acoustics n2	2.13 days	0.09 days	2.04 days
laying tiles 10x10	3.19 days	2.72 days	0.47 days
ventilation chimneys	0	17.5 days	0 days
Unknown	0	91 days	0 days

In the "Applet Settings," pay attention to the **"Project"** field according to which data will be retrieved concerning the selected project from the list.

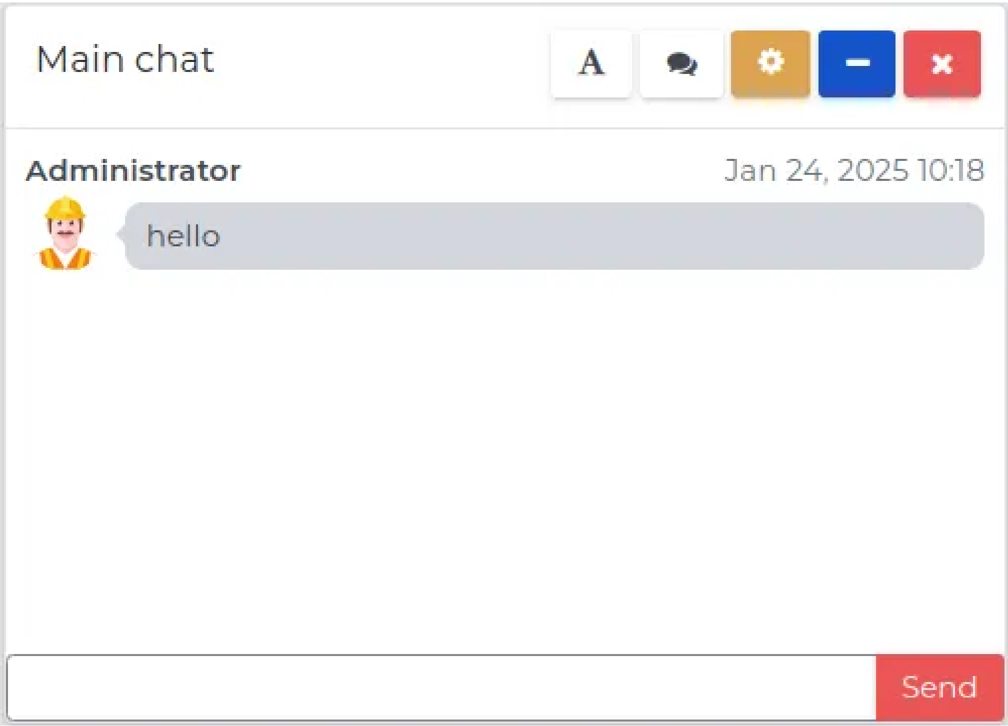
REMEMBER: Thanks to this system feature, it will be possible to verify at which stage of the work scope problems may arise, and what can be improved to fit within the planned project completion date.

NOTE: On the desktop, you can create several applets named “Time balance of the project work scope,” for which you will choose different projects.

Example: Chat.

Communicating between employees using the internal “Chat” is a commonly used method. The chat function eliminates the need to write to each user separately, translating into significant time savings and convenience.

NOTE: You can define chat participants for a newly created chat. All system users have access to the “Main Chat.”



In the “Applet Settings,” pay attention to the **“Chat”** field where you choose from the list the chat available in the system that you want to be visible in this applet.

If you want to create a new chat, follow the sequence below:

1. In the top panel, select the “Chat” icon and go to the “New chat” tab.

2. Fill in the form fields, which have the following meanings:

- **Name:** A name for the new chat, which will be visible to its users.

- **Participants:** Choose from a list of people who are to have access to this chat.

3. Save the data with the “Confirm” button.

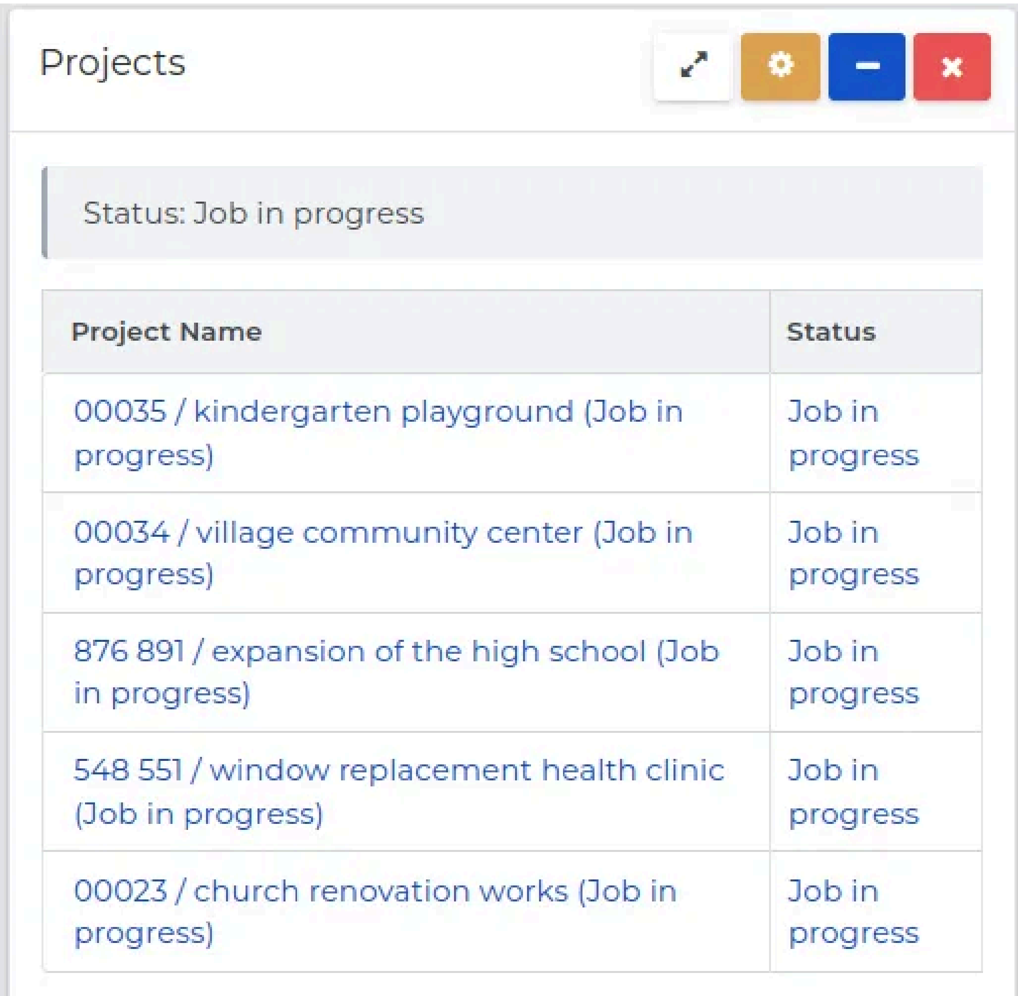
NOTE: Selected users can use this chat, but they cannot make changes to it. As an administrator, you have the ability to change its name, remove or add users, and delete the entire chat.

REMEMBER: The Chat applet is the same communicator that is available in the top panel.

Example: Projects.

The “Projects” applet facilitates tracking the progress of projects by customizing the displayed information based on various variables defined during its creation.

NOTE: Using many variables in the form at the same time will adjust the displayed information according to the introduced restrictions. This is not a mandatory requirement.



In the “Applet Settings,” pay attention to the following fields:

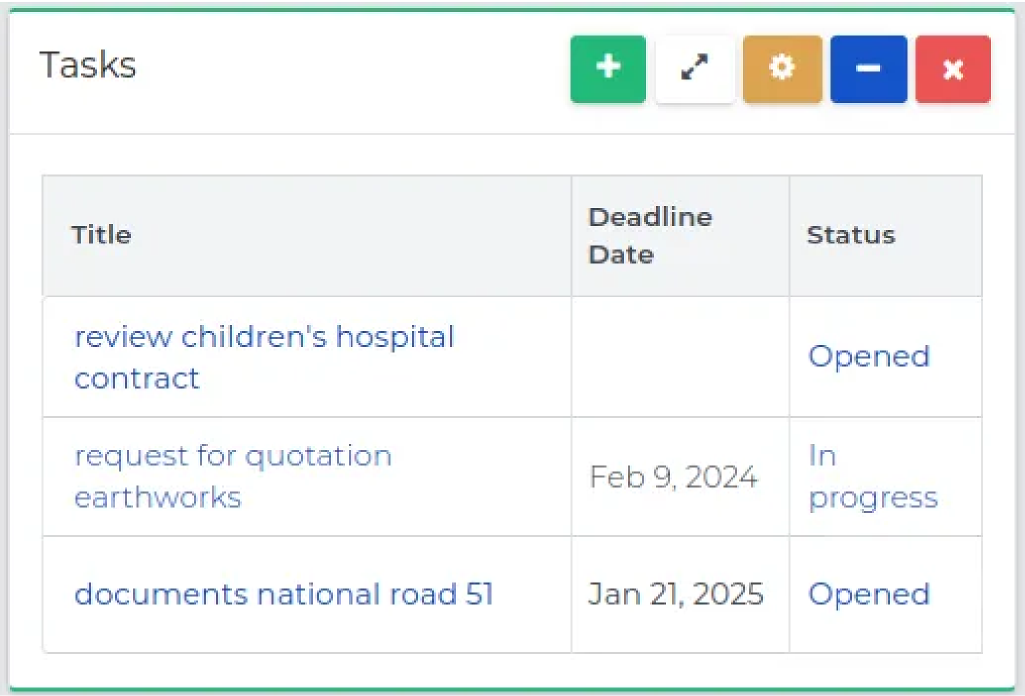
- **Project:** Selection of a project entered into the system.

- **Project status:** Determination of the stage at which the project currently is, its progress, and any potential issues or delays.
- **Assistant project manager, Foreman, Project manager, Project estimator**: Optional, but not required selection of a user performing the selected role.
- **Department the project falls under:** Selection of the department the contract concerns.
- **Fully settled:** Status determining the method of financial settlement.

> **NOTE:** On the dashboard, you can create several "Projects" applets, each of which may concern, for example, a specific project or its status. You can define these variables using the "Applet Settings" button.

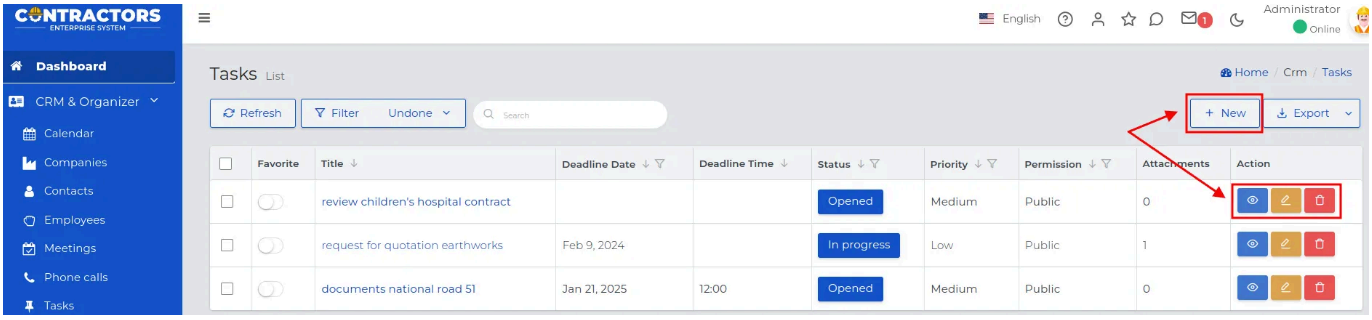
> **Example:** Tasks.

The "Tasks" applet contains all entries with planned tasks to be performed. The user sees what needs to be done, by what deadline, and what their current status is.


Tasks

Title	Deadline Date	Status
review children's hospital contract		Opened
request for quotation earthworks	Feb 9, 2024	In progress
documents national road 51	Jan 21, 2025	Opened

After selecting the "Go to the extended list" button, records will be displayed for which action buttons (View, Edit, Delete) can be applied, or create a new task by clicking on "New".



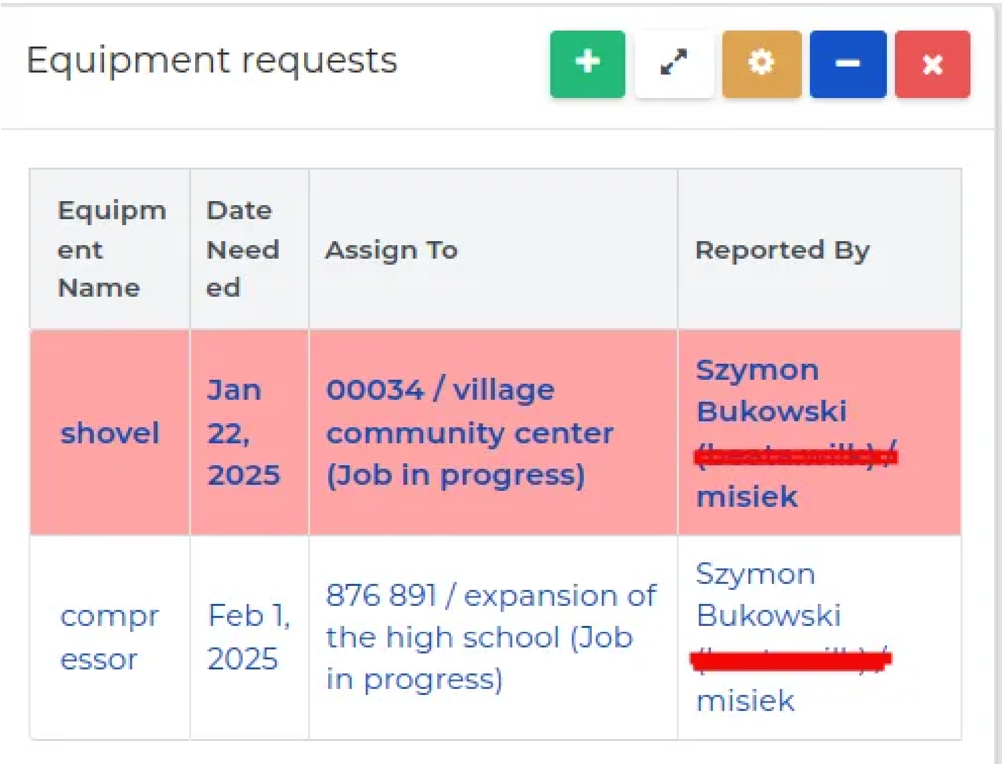
REMEMBER: You can also enter a new task by selecting the green "New" button, visible next to the applet name.

NOTE: All tasks with high priority will be highlighted in red on the task list.

REMEMBER: You can change the status of a task by clicking directly on the status name. You do not need to go to the edit form.

Example: Equipment requirements.

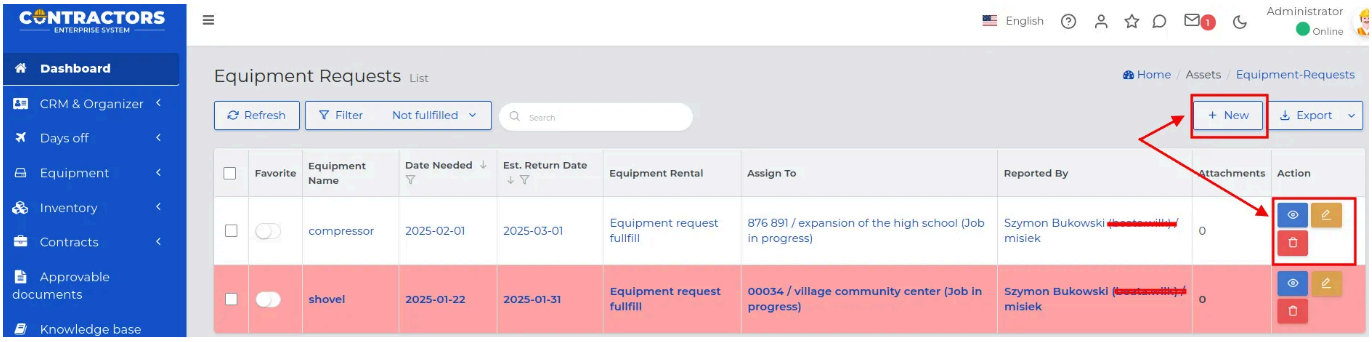
This applet is essential for an employee who manages the registry of equipment or machinery rentals, for which a demand has been reported. Rentals can be directly associated with a client or project, specifying who and until when they will be used.



Equipment requests

Equipment Name	Date Needed	Assign To	Reported By
shovel	Jan 22, 2025	00034 / village community center (Job in progress)	Szymon Bukowski [redacted] misiek
compressor	Feb 1, 2025	876 891 / expansion of the high school (Job in progress)	Szymon Bukowski [redacted] misiek

After selecting the "Go to extended list" button, records will be displayed for which action buttons (View, Edit, Delete) can be used, or create a new demand by clicking on "New".



REMEMBER: You can also enter a new demand by selecting the green "New" button, visible next to the applet name.

In the form for creating a new task, pay attention to the following fields:

- **Assign:** The ability to assign the demand to an entity belonging to the Clients or Projects group.
- **Reported by employee**: Selection from the list of the employee who reported the equipment demand - upon realization, they will become responsible for the equipment.

NOTE: All reported requirements for which the deadline specifying their completion date has passed will be highlighted in red on the list.

REMEMBER: You can change the "Equipment Rental" status by clicking directly on its name. You don't need to go to the edit form.

Frequently Asked Questions

1. **How can I quickly search for a record?**

   Searching for records on the list is possible thanks to sorting and filtering functions, which have been described in detail here. The fastest way to find a record is to use the filter by name.

2. **I want to export a file with only selected records from the list, how do I do that?**

   To export a file with selected records from the list, mark the entries you are interested in (in the first column) before clicking the "Export" button. Then, use the "Selected rows" option from the "Export" button's dropdown list. The exported file will contain only the records you have selected.

3. **Can I copy an existing record, changing only part of the data?**

   In the system, you can copy using the "Copy" button only those records that involve the cyclicity of events. For records outside the modules listed below, copying consists of creating a new entry with the same name, and the system may suggest duplicates for verification. You can read more about this here.

   Modules that allow for quick copying of records include, among others:

   1. CRM -> Meetings, Phones, Tasks (changing the date for the entered event).
   2. Equipment -> List (the same product names can be given a different serial number).
   3. Warehouse -> Purchases, Inventories (changing the date for reordering and stocktaking).

4. **Why can't I delete a record from the list?**

   Records cannot be removed from the system if there is at least one association, e.g., you cannot delete equipment for which there is an equipment rental by an employee.

5. **How does detailed filtering of records on the list differ from quick search?**

   In detailed filtering, you can specify and refine specific criteria according to which the list is filtered. Quick search only allows you to find an entry by name, where the scope will be limited and less detailed than during detailed searching.

6. **What is the difference between the "List" button and the "Back" button. Aren't they the same?**

   Both buttons serve different functions in the system.

   The "List" button takes the user from the currently viewed record back to the list of records in the given system module. For example, if you are in the details of a given contact, pressing this button will return you to the list of all contacts in the CRM module.

   The "Back" button works on the principle of the internet browser history, moving the user from the current record back to the previously viewed record, regardless of the module. It's like going back a step in the browser history, where you return to the previous page or record.

7. **Can a deleted record be recovered?**

   Deleted records can be easily restored to the original lists from which they were removed. The procedure for restoring deleted records is described in detail here.

8. **How to remove several records from the list at the same time?**

   Deleting several records at once from the list is done using the batch method, described in detail here. The system allows you to delete records located on one subpage of the system.

9. **Where are the records marked as "Favorites" displayed?**

   A collective list of all favorite records is generated automatically and remains accessible after clicking the star icon on the top bar, and then "Favorites".

   A record marked as "Favorite" on the list has an active toggle in the column of the same name. The list of records can be filtered to display only favorites by clicking the arrow next to the filter button, and then selecting "Display only favorites".

10. **Can records on the list be sorted in alphabetical order?**

    The list of records can be sorted at will, using the methods described here. Entries on the list can be sorted alphabetically from A to Z (ascending) or from Z to A (descending), using the appropriate arrow in the column of the chosen name.

11. **I want to display on the list only those company or contact records that belong to the same group, how do I do that?**

    Records of the same group can be displayed on the list by using the filter function of columns by associations. Simply select the target group from the dropdown list using the "funnel" icon next to the appropriate column name or in detailed filtering.

12. **What is the difference between selecting "Cancel" and "All" on the record filtering list?**

    "Cancel" on the dropdown list removes the last used filter and restores the default settings. If the default settings do not display all records, you should select the "All" option to see all records.

13. **Why, after entering and searching for records on the list with the so-called detailed filter, can't I return to the original list of records?**

    Returning to the original list of records will be possible after removing all marked filters during the search. To cancel a detailed filter, click the "Undo changes" button above the search table, next to the "Search" button.

14. **What additional elements are available in the "More" tab next to other tabs of the displayed record?**

    The "More" tab allows you to expand the full list of available functions related to the displayed record. The number of tabs may vary depending on the type of record.

15. **What is the purpose of the ID number visible in the record preview?**

    The ID number assigned to a record on the list is used for the unique identification of that record in the database system. It is a unique identifier that allows for quick and precise location of a specific record among others. Just enter the assigned ID number in the detailed search form, and the system will locate and display that record.

16. **Can every user create, edit, and delete records in the system?**

    Assigning permissions to system users is the task of the administrator, who, depending on the roles performed, defines the scopes and system competencies for individual users. This means that not every system user must have all possible system options.

17. **Why can't I see a tab named "History"?**

    Make sure you have the appropriate permissions to access the history of records. The administrator can assign access to the history of records to selected users.

18. **How to check the total number of records contained in the selected module on the list?**

    In the lower left part of the screen, just below the displayed table of records, there is information about the total number of all records. This number includes all entries on the given list according to the set filter and permissions of the currently logged-in user. To check the total amount, the **administrator** must display all records and read this amount.

19. **How to add an employee's private email address to their user account in the system?**

    Remember that only an administrator can configure a user account in the system. The email address entered in the user profile is used to register an account at Contractors.es. System information and messages are sent to the provided user's email address, accessible only to the owner of the email. In their contact, you can additionally enter other email addresses.

20. **Will messages sent using the email available on an external server be visible on the "Email Queue" module list?**

    Yes, all messages passing through the email mailbox, which has been configured to the Contractors.es system, will be visible on the list of the "Email Queue" module. Remember that the configuration of the email is intended only for reading and archiving delivered messages. Replying to incoming messages and creating new ones is done through an email program (e.g., Outlook, Thunderbird) or the website of the email provider.

21. **How to recognize that a message has been archived?**

    An archived message in the "Email attached to" column has information about the place to which it has been moved. Emails without this designation have not yet been archived.

22. **Where can I download the parameters for configuring email programs?**

    Parameters for configuring mail programs depend on the mail service provider (e.g., Gmail, Yahoo, Outlook) and the mail protocol used (e.g., IMAP, POP3). You must visit the mail provider's website and find the section on configuring your mail account. Usually, the necessary information is provided there, such as incoming and outgoing mail servers, ports, protocols, etc. However, remember that the exact parameters may vary depending on the region, and providers sometimes make changes. Therefore, it is always good to check the latest information on the mail provider's website.

23. **How many users in the system can use one email box?**

    There is no limit to the number of users that can use a single email box.

24. **What does the red and blue circle next to the email box icon in the administrative panel at the top of the screen mean?**

    The graphic markers next to the email icon on the top administrative panel change depending on the status of email messages.

    The red circle indicates the number of unread messages on the server received in the last 30 days.

    The blue circle indicates new messages detected within the last five minutes on the mail server, including incoming and outgoing messages (excluding messages belonging to groups named "Skip folders").

25. **Are archived messages automatically deleted by the system from the inbox?**

    Archiving email messages in Contractors.es copies the message to the system without affecting the mailbox - in summary, the message remains on the mail server in the same state as before.

26. **How many times can I archive the same message?**

    The system allows for an unlimited number of archives for a single message. When deciding where to move it, always check to which records the message has already been moved. This information can be found in the "Email attached to" column. Archived messages remain visible in the "Email → Queue" module for 30 days from the date of sending/receiving the email. During this period, they can be archived for the first time. An archived email can be attached to other records at a later date.

27. **How can I create a new record in the list?**

    Creating and deleting records in the list is consistent throughout the system. To add new records to the list, use the "New" button, located in the upper right corner of the screen.

28. **How to remove the recently set sorting or filtering method for records in the list?**

    Depending on the method of filtering or sorting records used, returning to the last applied settings is possible through:

    - the "Reset" button in the column filter according to possible associations,
    - the "Cancel" option available in the dropdown list when filtering by different record features,
    - the "Undo changes" button in the detailed filter,
    - deleting the entered name in the "Search" field during quick search.

29. **What does archiving emails mean and how to use it?**

    Email archiving involves copying and storing messages in such a way as to enable their easy retrieval in the future. The scheme for moving messages to the archive is simple to use and has been described in detail here.

30. **How to generate PDF documents based on a selected record?**

    Generating PDF files is available only for selected system records. Documents can be sent, saved, or printed for signing and archiving in the company's documentation, depending on the needs that arise. In the preview of selected records, additional functional buttons named: “Download order in PDF”, “Download PDF”, and “Download request for proposal in PDF” will be visible. The types of entries with the described function can include records belonging to modules:

- Equipment -> Rental register,
- Warehouse -> Purchases/ Transfers/ Inventories,
- Contracts -> Material verification/ Invoices.

31. **How to add records to the favorites list?**

    All you need to do is move the toggle to active in the “Favorites” column next to the selected entry.

32. **How to permanently delete records from the system?**

    The content of records deleted from the list can be viewed and restored to the original list from which they were removed as described here. It is not possible to permanently remove previously deleted entries from the system due to:

    - the recorded history of changes where you can track who and when made modifications,
    - the complete loss of important information in the event of their accidental deletion,
    - protection and security against deletion by unauthorized persons.

33. **Can I edit a record and how do I do it?**

    Not everyone has the right to edit every record. If you have sufficient permissions, a record can be edited in two ways:

    - by selecting the “Edit” button in the record table,
    - by clicking on the record name, and then selecting the blue “Edit” button in the upper right corner of the screen.

    After making changes, remember to save the form. Otherwise, the entries made will not be preserved in the system. More about basic actions related to records can be found here.

34. **How to add a new tab to the dashboard?**

    To add a new tab to the dashboard, you need to go to the dashboard editing, click the “New” button, enter the name of the tab and confirm its addition.

35. **What are the main tasks of applets in the system?**

    Applets are graphical components visible on the dashboard, enabling quick access to important functions and information. Their task is to facilitate daily work and increase the efficiency of using the system.

36. **How can I move an applet from one tab to another?**

    To move an applet from one tab to another, you need to go to its settings, then in the field named “Desktop” select the target tab name and save the changes.

37. **How to add an applet to the dashboard?**

    The simplest way to add a new applet to the dashboard is to select the “New applet” button and fill out the form. If the selected type of applet requires filling in additional fields, the system will inform you with an appropriate message. More about adding applets to the dashboard can be found here.

38. **Where on the desktop will the added applet be visible?**

Added applets automatically position themselves at the bottom of the column to which they were added. In the form, you can only specify the type of column. If you want to move the applet to a higher position, just grab the applet's frame with the cursor, move it to the desired location, and release the cursor.

39. **Can I change the order of the applets on the desktop?**

    Yes, you can change the order of the applets on the list by choosing one of the possible ways:

    - grab the selected applet with the cursor, move it to the desired location, and release the cursor,
    - go to the desktop editing, at the selected tab where the applet is located, click the "Display" action button and move it up or down using the "dots" icon.

    Applets can be moved (order changed) only within the same tab.

40. **Will the data in the deleted applet be lost?**

    Data in the deleted applet will not be lost and will be visible again after re-adding the applet to the desktop.

41. **Can applets on the desktop be duplicated?**

    The system allows adding multiple applets of the same type. If there are filters in the applet settings that allow for different data display, it is worth defining them in order to display only the information we are interested in.

General Settings

It is very important to customize the system to the specific needs of the company before its full implementation. The order of system settings is arbitrary. The sections visible in the “Admin” system menu should be set in such a way as to ensure optimal access and functionality for all system users.

> **REMEMBER:** The Administrator has the highest permissions to manage the system. Only they can make changes in the system sections.

> **NOTE:** Permissions entered in the “Admin Panel” section are unavailable and invisible on the dropdown menu list for other system users.

Global settings and appearance

Located in the Admin menu section -> General Settings, they relate to parameters including calendar settings, working hours, language, time zone, currency, and the appearance of the sidebar.

> **NOTE:** Most of these parameters are automatically configured by the system, taking into account the current location of the company. However, there may be situations where minor changes need to be introduced.

The settings in the form correspond to:

- **CRM: Calendar - Duration of the time slot:** The minimum time range visible on the CRM calendar.
- **CRM: Calendar - Default working hours:** Working hours set by default in the CRM calendar. Working hours are marked with a different background color in the calendar.
- **CRM: Calendar - Time range:** The range of hours visible in the CRM calendar.
- **Default currency, country, state/province:** The values corresponding to these fields will be set as default in forms where these fields appear (e.g., contact, company, project).
- **Default language:** The language in which the system will be displayed by default.
- **Main company:** The company using the system. This option should only be changed in the event of changes in the company’s structure, e.g., when the company has several subsidiaries and the managing subsidiary changes.
- **Other allowed currencies:** Optional types of currencies in which transactions can be registered in the system.
- **Email footer:** An automatic signature in email messages where contact details are taken from the currently logged-in user’s profile.
- **Regional settings (Time format, Date format, Time zone, Measurement system):** Parameters automatically configured by the system, depending on the region of the registered company.
- **Appearance: logo (for collapsed and expanded menu):** Allows setting the company logo that will be displayed in the system (e.g., during login).

- **Appearance: header:** The content that appears on the user login screen.
- **Appearance: sidebar:** The selected color scheme template from the list in which the menu list can be displayed.

Vacation and Sick Leave Parameters

Settings related to the calculation and recording of vacation and sick days reported by employees are available in the Admin → Vacation Days Settings menu.

> **NOTE:** The system defaults to configuring values related to vacation days. Check if the following settings need to be adjusted to comply with the laws of the country and/or company policy.

> **NOTE:** Vacation for each employee is calculated daily as a fraction of the set entitled days.

The form settings relate to the configuration of fields with the following meanings:

- **Accumulate the number of paid sick days up to the maximum number of paid sick days per year:** The system will not allow the accumulation of more paid sick days than allowed for a given employee. To check the maximum number of days entitled to a given employee, go to CRM → Employees → Select an employee → HR tab → "Number of Paid Sick Days Per Year" field.

- **Accumulate the number of on-demand vacation days up to the maximum number of on-demand vacation days per year:** Similarly to the accumulation of sick days.

- **On-demand vacation days are included in the vacation days:** The value of these days is counted towards the total number of vacation days granted to an employee per year.

- **Default number of paid sick days per year:** Each new employee will have this value set as the number of days entitled as paid sick leave for each year worked. This value can be modified separately for each employee.

- **Default number of vacation days per year:** Each new employee will have this value set as the number of days entitled as vacation for each year worked. This value can be modified separately for each employee.

- **Default number of on-demand vacation days per year:** Each new employee will have this value set as the number of days entitled as on-demand vacation for each year worked. This value can be modified separately for each employee.

- **Import Public Holidays:** When marked as "yes", the system automatically retrieves information about Public Holidays and marks them on the calendar as days off from work.

- **Allow to choose more vacation days than are available:** Allows for requesting/granting vacation days even when the above limit has been reached.

- **Select weekend days off work:** These days will be deducted from the vacation, for example, if someone takes a vacation from Monday to Sunday, and here we have Saturday and Sunday set, then 5 days of vacation will be deducted because Saturday and Sunday will not be counted as vacation days.

- **Public Holidays are paid on the following days:** If a Public Holiday is paid, the employee receives paid leave on that day, which does not reduce the number of vacation days.

Data Import

You can import data prepared in the appropriate format into the system quickly and easily. More information about creating data imports can be found here.

Permissions Configuration

Configuring permissions in the system is crucial for precise access control, providing the administrator with the ability to tailor permissions to user roles and responsibilities. This enhances system security, protects confidential data, and minimizes the risk of unauthorized access to critical data.

Creating user accounts in the system

For an employee to start working in the system, it is necessary to create a user account for them. After setting up the account, the administrator has the ability to precisely define permissions and roles for each user. Such a process allows for limiting the visibility of selected records in the system and controlling access to their content and making changes to them.

> **REMEMBER:** Precise data entry when creating user accounts in the system is crucial. A collective list of employees cannot be imported due to varied job positions, salary rates, and other variable values.

> **NOTE:** You cannot create a user account without entering them on the list of employees or subcontractors (applies to a user for a subcontractor's foreman).

Enter the employee on the list in the CRM menu, following the order below:

1. Select the "CRM -> Employees" menu and enter the employee on the list using the "New" button.

> **REMEMBER:** To enter an employee on the list, you must fill in all the required fields in the three visible tabs: "General", "HR".

2. Fill in the personal data form in the "General" tab, paying attention to the fields:

- **Groups:** Assigning the employee to a "Contact Groups" category, i.e., choosing a position, such as Estimator, Field Worker, or Foreman. You can find more information here.

> **REMEMBER:** An employee can be assigned to several "Contact Groups" at the same time.

- **Permissions:** Defining access to the employee's record by other users - details are described here.

3. Go to the "HR" tab and set the status to "Employed".

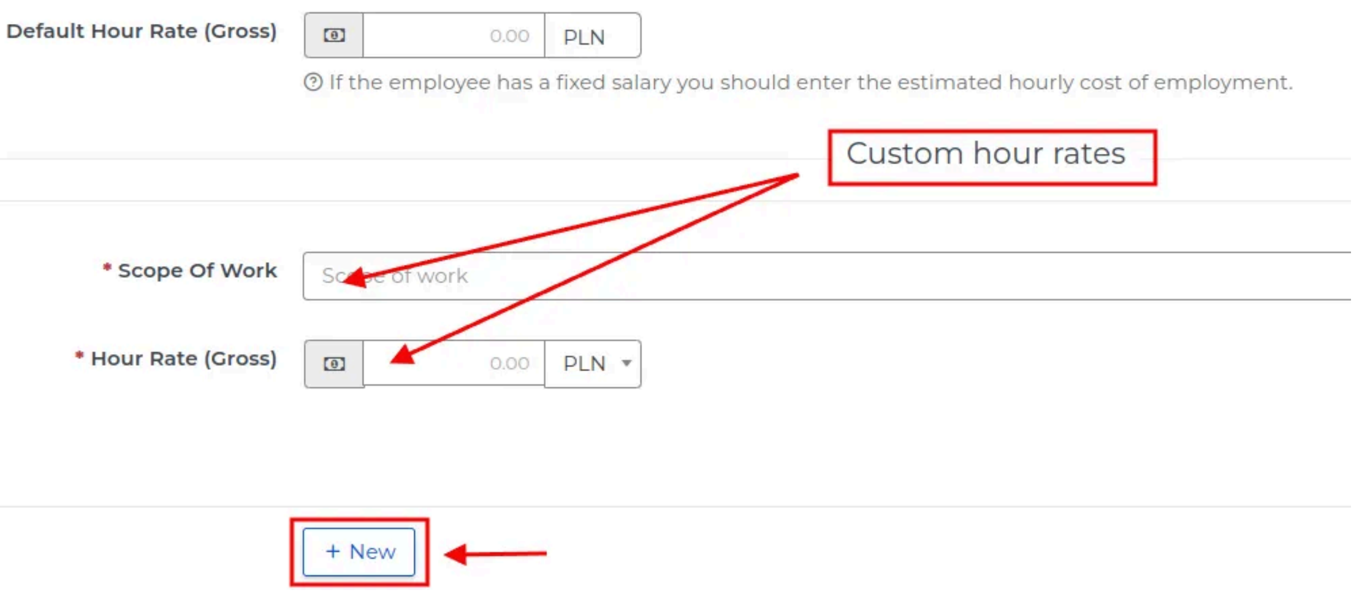
4. Fill in the personnel information:

- **Date of employment:** Since when the employee is employed.

- **Department:** Assign the employee to the “Employment Department” category (e.g., Administration, Painting).
- **Subdivision/Brigade:** Optional name of the employee group (e.g., “Painting -> Interior Walls”)

> **NOTE:** Values for the “Subdivision/Brigade” field will be visible on the list after entering them in the section “First steps - configuration” in **Step 3**.

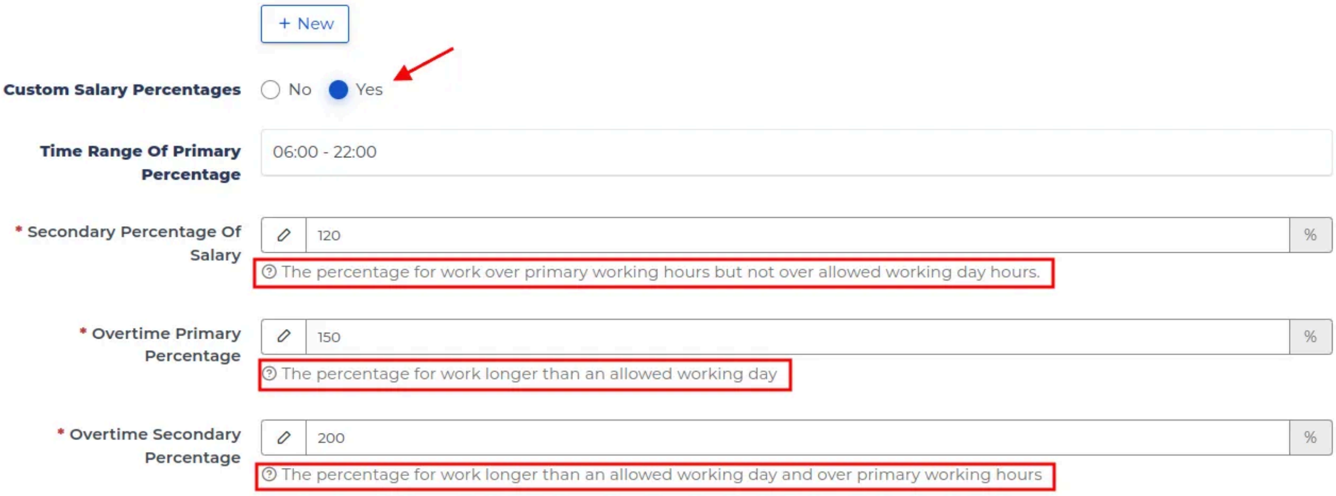
- **Social Security Number, date of birth:** Personal data.
- **Hourly rate**: Determine the hourly rate from two available options:
  - **Standard hourly rate:** If the employee has a fixed salary, enter the estimated cost for one hour of their work (divide the gross salary value by the number of working hours in the month). This is the cost that will be used to generate statistics for projects.
  - **Non-standard hourly rate:** If the employee has negotiated different rates for different jobs, then define a “Scope of work” for them and set the gross hourly rate.



> **NOTE:** For one employee, you can define several scopes of work, each additional scope is added with the “New” button.

> **REMEMBER:** The specified method of accounting for hours is based on the work planner and the employee’s presence at work recorded through the mobile application of the employee or project manager.

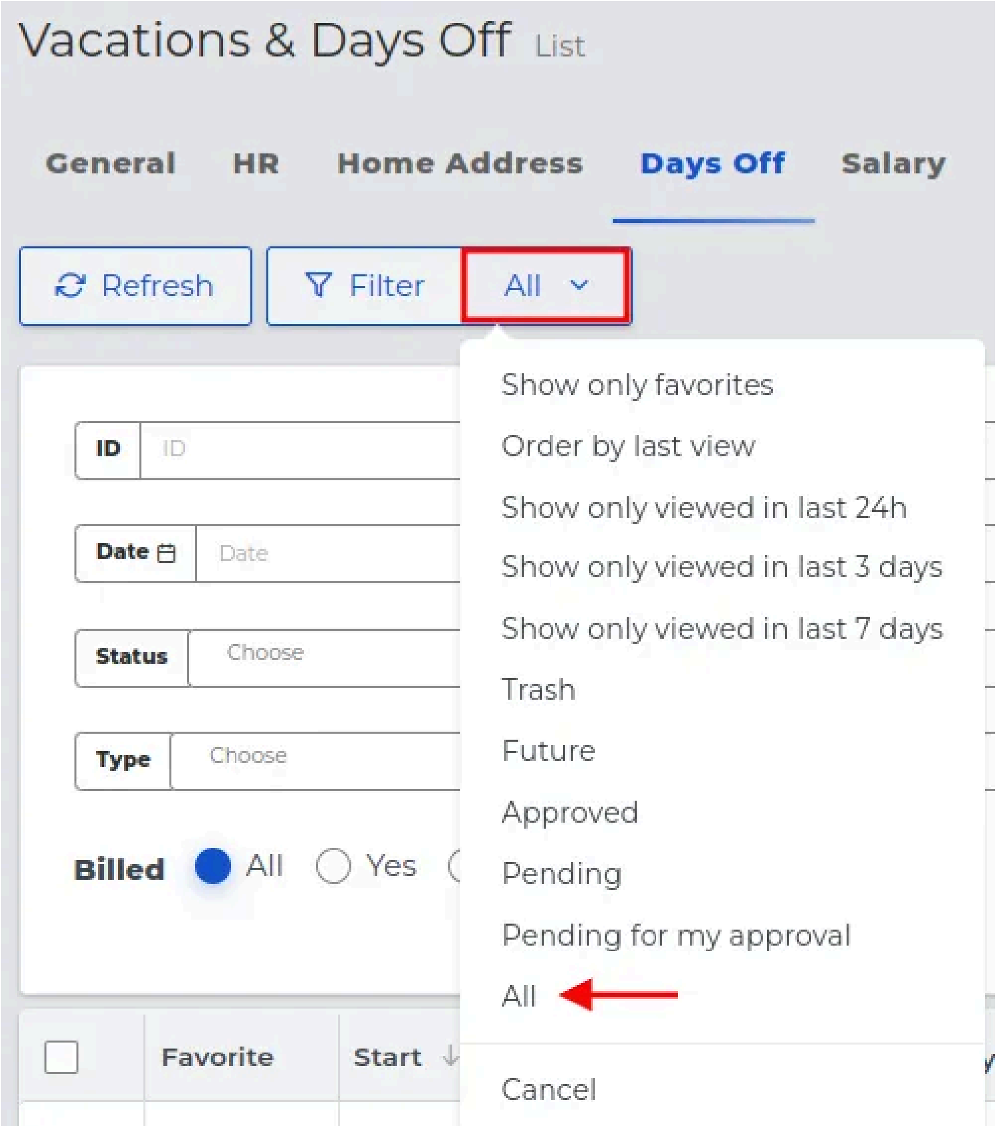
- **Custom percentage salary rates:** If the employee has negotiated non-standard rates for overtime or night/weekend work, they should be entered here.



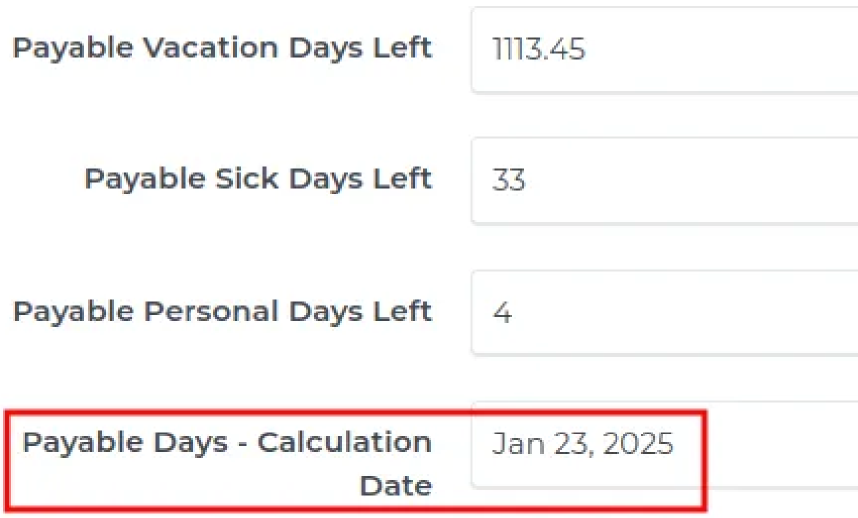
REMEMBER: The application of this settlement applies to field employees, for whom the possibility of overtime has been taken into account.

- **Benefits, obligations:** Additional benefits granted to an employee or obligations they are burdened with.
- **Marital status:** A designation of social status - single, married.
- **Leaves and days off:** If an employee has negotiated different leave conditions than the default, they should be filled in here. Default values are taken from the system settings made earlier.

REMEMBER: All requests for days off submitted by the employee through the Contractors.es system, once approved, will be registered and visible in the employee’s tab named “Days off”.



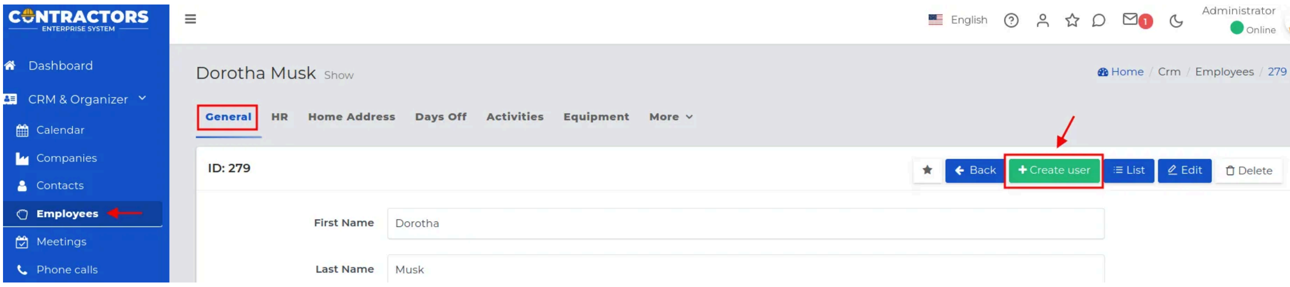
NOTE: The system calculates the value that the employee can enter in their request, based on the number of days worked in relation to the entitled days off.



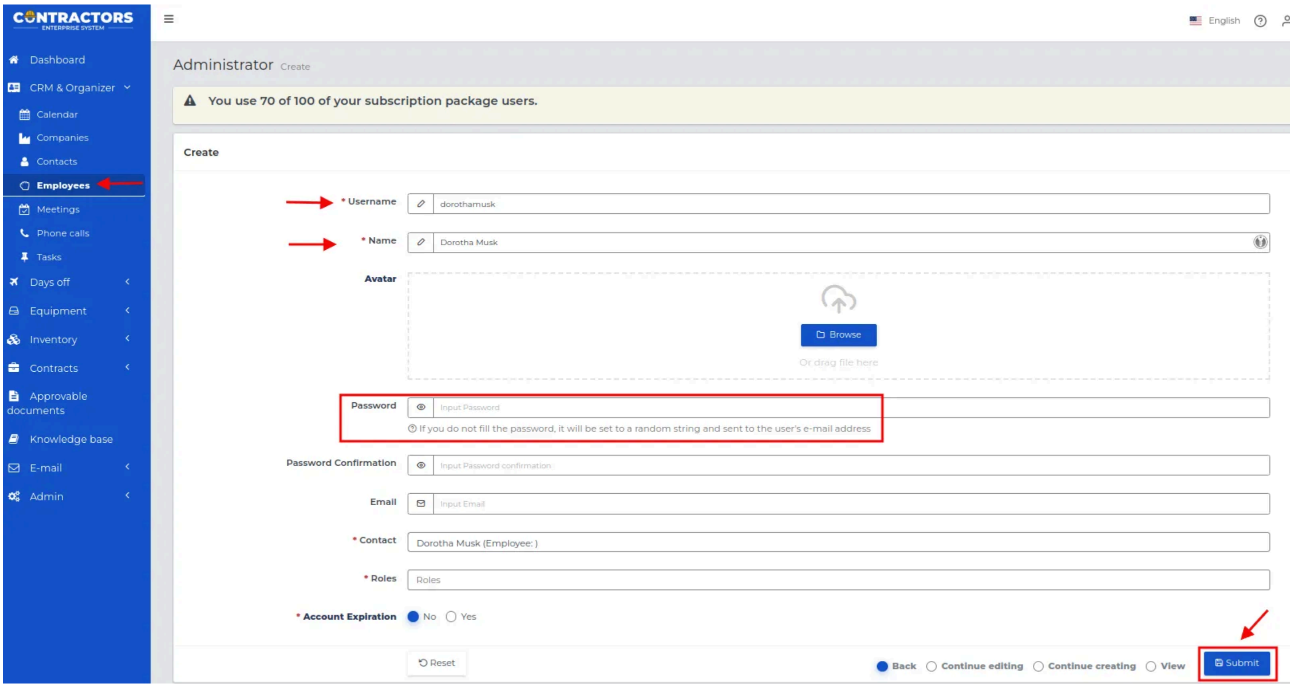
5. Optionally, select the last tab “Home Address” and enter the employee’s address details. “Home Address” has a separate permission and is by default visible only to administrators and users with the HR role.

6. Save the completed form by clicking the “Confirm” button.

7. Go to the preview of a given employee in the list of records and click the green “Create User” button.



8. Fill in the blank fields in the user creation form and save the changes with the “Confirm” button.



NOTE: The system will generate values for fields that you can change:

- **User:** It will enter a login with which the user will log in, e.g., mikolajtrabka.
- **Name:** Will be identical to the contact name entered into the system, e.g., Mikołaj Trąbka. If necessary, it can be changed.

REMEMBER: If you do not fill in the password in the “Password” field, it will be randomly generated by the system and sent to the user’s email address.

NOTE: The “Roles” field determines the permissions corresponding to the employment position, select it from the dropdown list, e.g., field worker.

REMEMBER: The account’s activity term in the system can be set by entering a date in the “Account Expiration” field, so that the user cannot log into the system after this date.

9. An email will be sent to the employee’s address containing a link and data for the first login to the system.

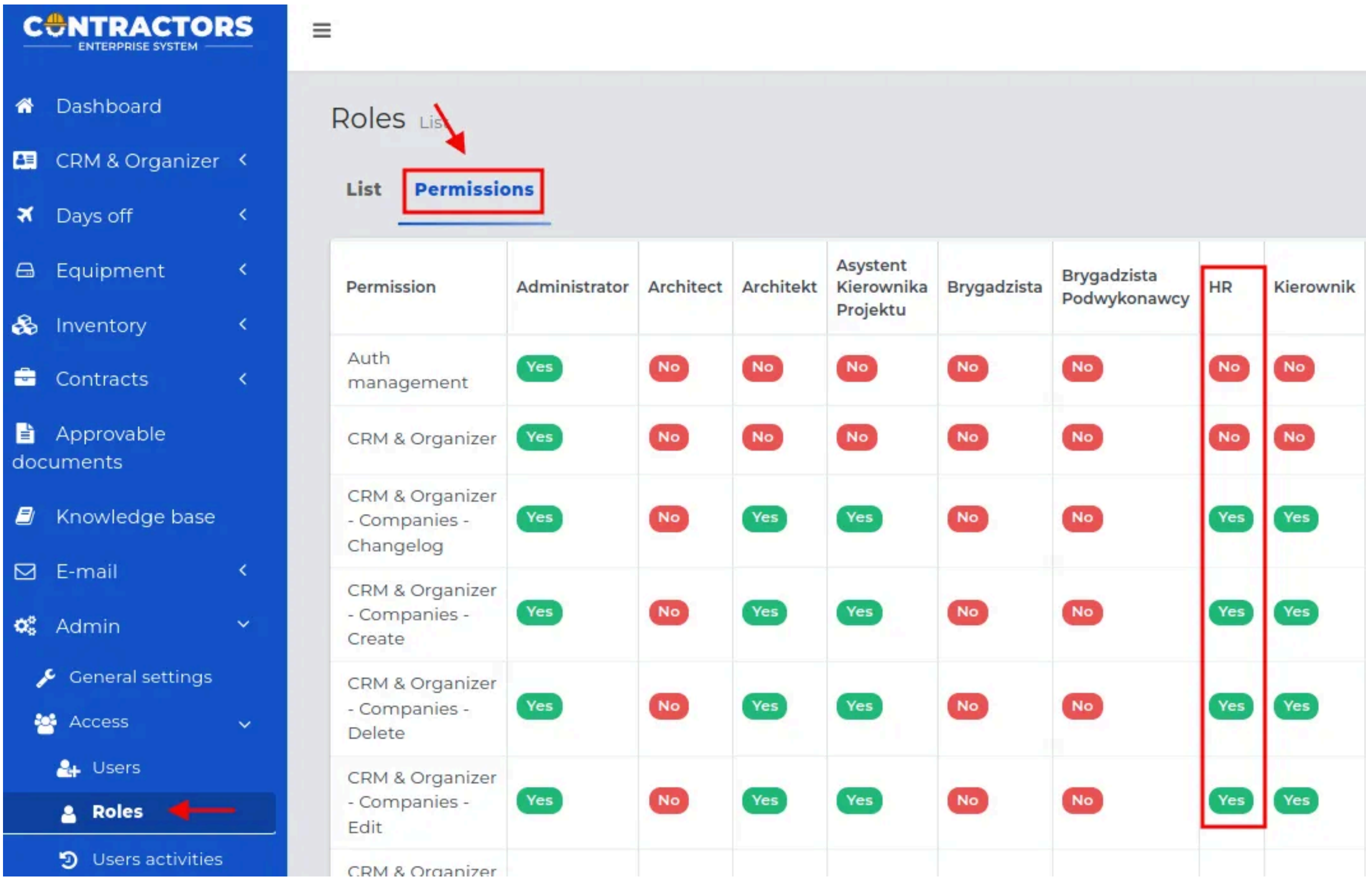
The list of users added to the system is available in the menu “Admin -> Access -> Users”.

User Permissions

User permissions control access to modules.

You can view the entered permissions in two ways:

- Click the “Display” button next to the selected user on the list “Admin -> Access -> Users”.
- View the graphical list of permissions for all roles by selecting the “Permissions” tab in the “Admin -> Access -> Roles” section.

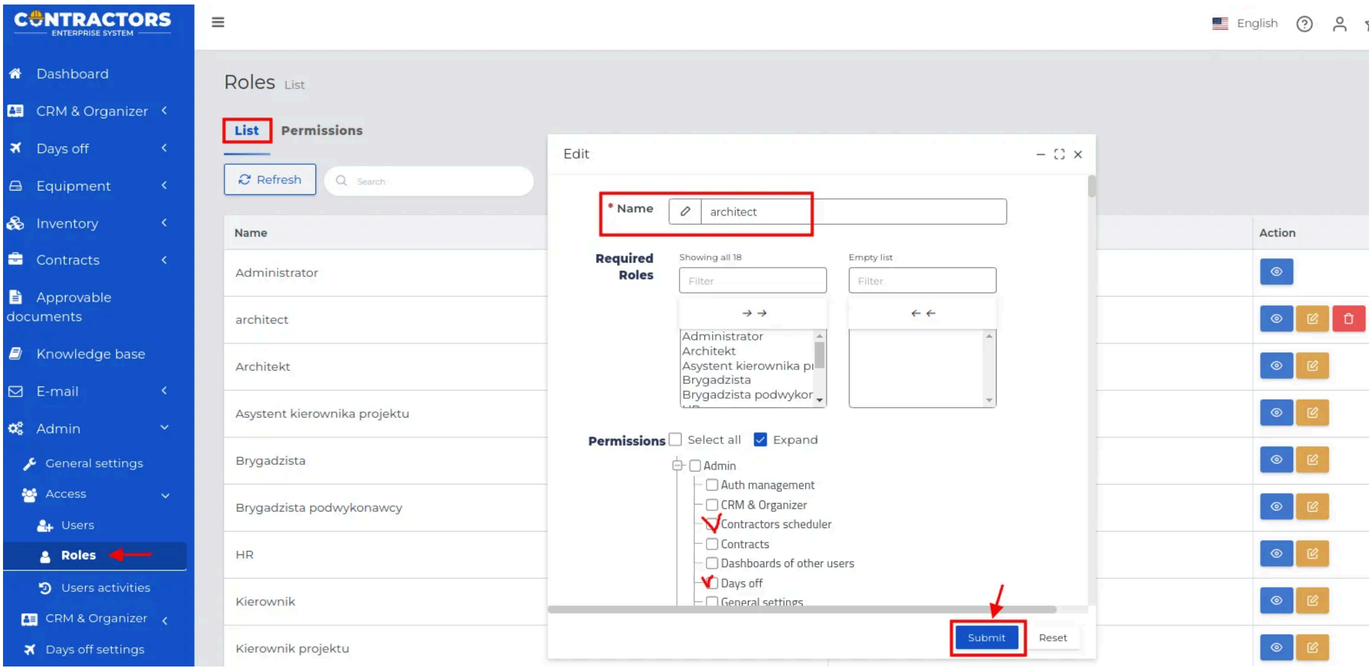


You can also make any changes to user permissions by following the order below:

1. In the menu “Admin -> Access -> Roles” select the “List” tab.

2. Go to “Edit” next to the selected role record.

3. Mark the permissions on the list that you want to add or remove and save the form with the “Confirm” button.



NOTE: Significant modifications to basic roles are not recommended. Consider whether it is better to create a new role for significant changes in permissions.

REMEMBER: Any change in permissions for a given role in the system will directly affect the permissions of all users assigned to that role.

System Roles

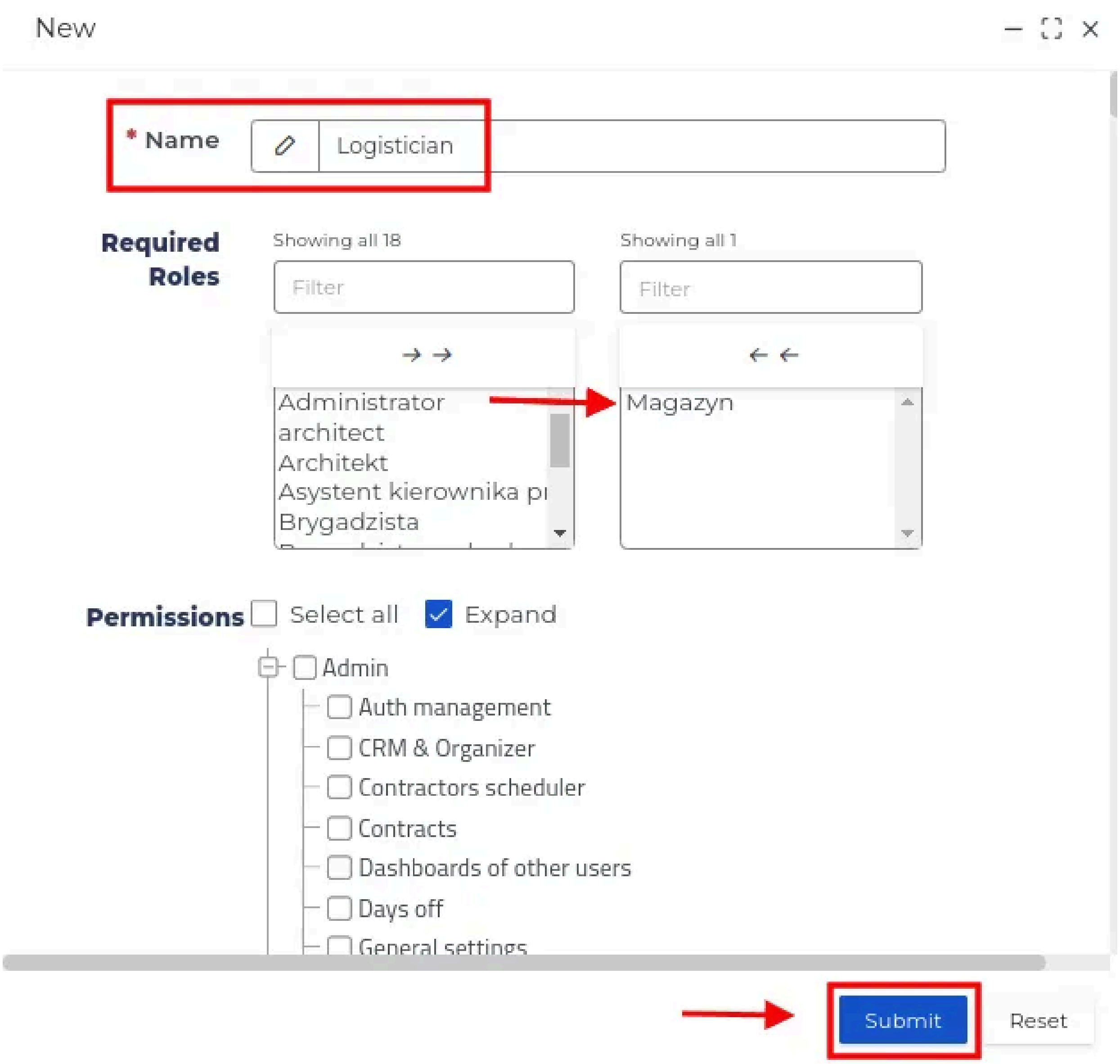
System roles are a group of permissions assigned to positions depending on the functions performed in the enterprise. Each role defines specific functions and controls access to particular modules and system resources. The list with defined role names is available in the menu “Admin -> Access -> Roles”.

You can edit selected roles on the list through “Quick Edit” or create a new role by clicking the “New” button. The form remains the same, but a new role requires entering a name.

NOTE: If you want the new role name you are entering into the system to partially overlap with the permissions of another role, follow the steps below:

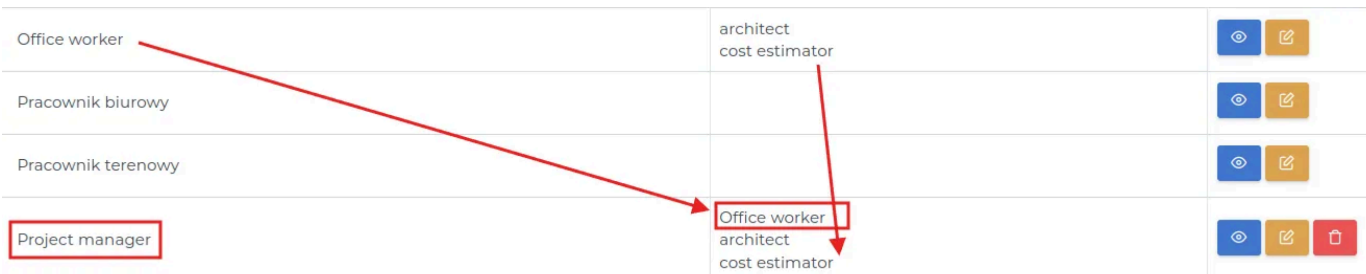
1. Add the name of the new role to the system roles list using the “New” button, e.g., Logistician.

2. Under the “Required” field, click on the name of the role whose permissions are to be inherited, e.g., Warehouse.

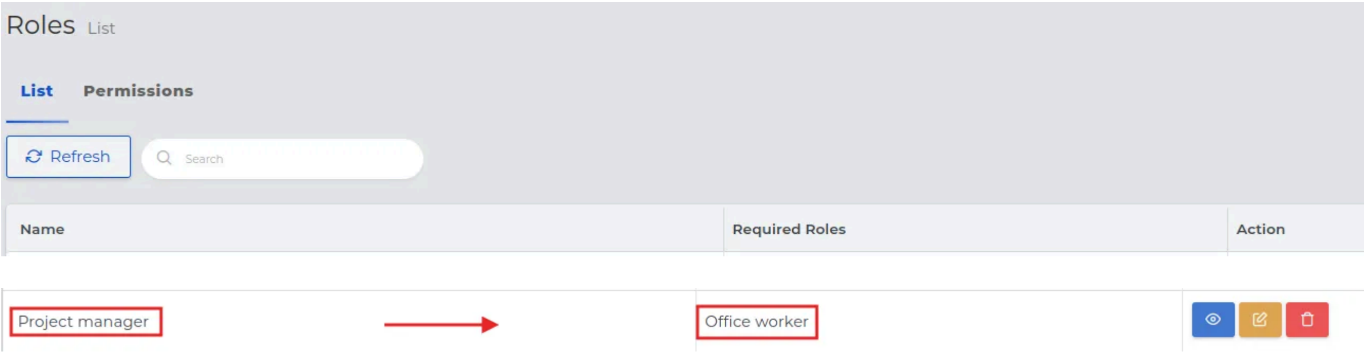


3. In the permissions tree, select from the list those permissions you want to additionally assign to the newly created role and save the form with the “Confirm” button.

> **REMEMBER:** If the selected required role previously had another role from the list assigned, then the new role on the list will receive all those roles simultaneously.



NOTE: Roles without inheritance in the “Required” column have the least permissions. Roles with inherited other roles have broader permissions.



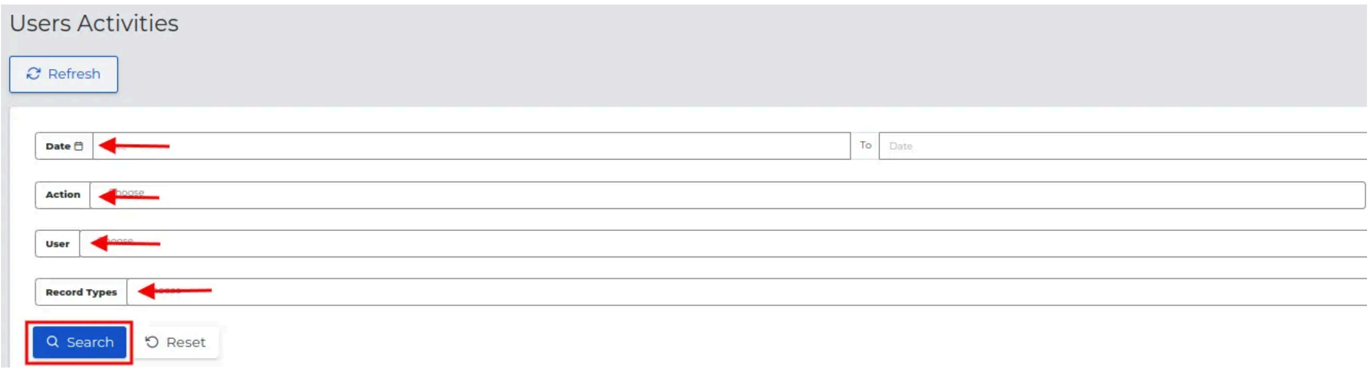
User Activity History

The system logs changes made to records, as well as their viewing actions.

REMEMBER: Only administrators have full access to the activity history, and this option cannot be disabled or limited by system settings.

The history of changes in individual records can be tracked in the “More -> History” tab. You can find a complete list of all changes in the system in the “Admin -> Access -> User Activity” menu - you must be logged in as an administrator.

NOTE: The system’s record filtering function allows you to quickly find a specific entry. You can filter data by date, action, username, or record type. The more criteria you provide, the more efficiently you will find the entry you are interested in.



Note Categories in Records

Notes are short and precise pieces of information that users can add to records in the system. It is beneficial to categorize notes so that their view in the list of entries reflects the category to which a given entry belongs. Restricting access to notes only for selected roles in the system helps protect their content from people who do not have the appropriate permissions.

> **REMEMBER:** Every user can add notes under selected records, but access to them can be limited if you configure visibility for specific note categories.

> **NOTE:** The allowed types of associations are places in the system where, when entering notes, it will be possible to select the created category.

> **REMEMBER:** Notes added to records do not have to be associated with specific categories - such notes are classified as others.

Examples of note categories that can be created in the system along with their possible associations:

1. **Personal Data:** Personal information of employees limited to the “HR” role -> Contacts.

2. **Project Data:** Remarks and information related to projects -> Acceptable Documents, Daily Reports, Phones, Subcontractor Agreements, Material Verification, Inspection Visits, Information Requests, Project Changes.

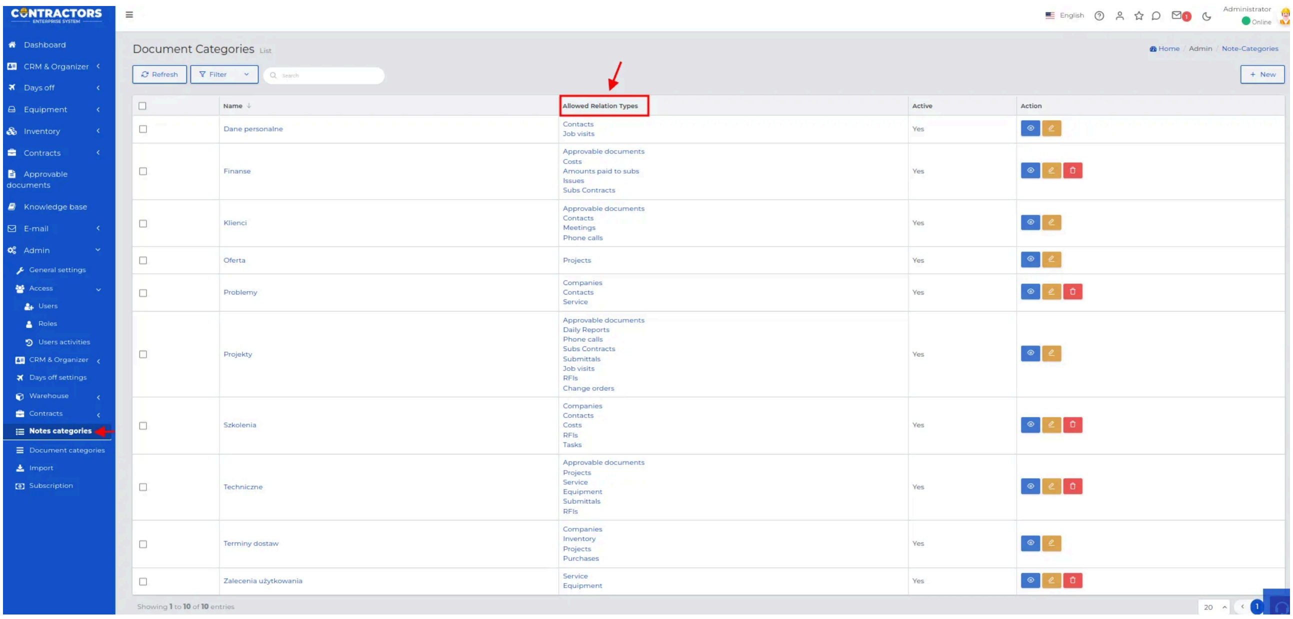
3. **Finance:** Related to payments and settlements - available only for the “Accounting” role -> Acceptable Documents, Costs, Amounts Paid to Subcontractors, Issues, Subcontractor Agreements.

4. **Training:** Related to planning and conducting training -> Contacts, Tasks, Meetings.

5. **Issues:** Concerning reports of problems that have arisen and ways to solve them -> Companies, Equipment Service.

6. **Schedule:** Planned delivery/work dates related to the project or subcontractor -> Companies, Projects.

7. **Usage Recommendations:** Information on the safe and efficient use of specific equipment -> Equipment.



Creating note categories is done in the following order:

1. Go to the “Admin -> Note Categories” section and click the “New” button.

2. Add the category name and mark in which records users will be able to create entries with it, the so-called allowed types of associations.

3. Optionally, select the roles that will have access to such notes.

> **REMEMBER:** Specifying roles effectively protects notes from access by unauthorized persons.

> **NOTE:** Leaving the “Only for users with roles” field empty, notes will be visible to all users, regardless of the roles they hold.

4. Leave the “Active” slider on if you want the note category to be visible in the system.

5. Save the data with the “Confirm” button.

> **REMEMBER:** If you have stopped using a particular category, it is recommended to deactivate it by moving the slider. Despite deactivation, notes assigned to this category will remain visible. However, it will not be possible to add new notes with this category.

> **NOTE:** You cannot delete a category if there are any notes assigned to it.

Types of categories for attached documents

Documents that you add to records can include contracts, purchase invoices, and other arrangements. As with notes, you have the option to create categories, set links between records, and control access to them. In this system section, you should also define so-called acceptance steps for the selected document category. These are situations where the uploaded document requires approval by the appropriate person. This procedure may involve one or several stages, where the document is sent sequentially to users with assigned roles.

> **REMEMBER:** Restricting access to document views allows you to protect their content from people who do not have the appropriate permissions.

Examples of document categories that can be added to the system along with their possible associations:

1. **Candidate CVs** -> Tasks (task of finding an employee).

2. **Project plans** -> Projects, Construction Changes (may require approval by a constructor or architect).

3. **Cost accounts** -> Tasks or without associations (equipment purchase approvals should be made by people knowledgeable about the type of devices).

4. **Contracts** -> Contacts, Companies, Projects (contracts may be approved by legal, accounting, and/or HR departments).

> **NOTE:** The three types of categories for attached documents created in the system are editable. Verify their content before creating a new category.

Creating document categories is done in the following order:

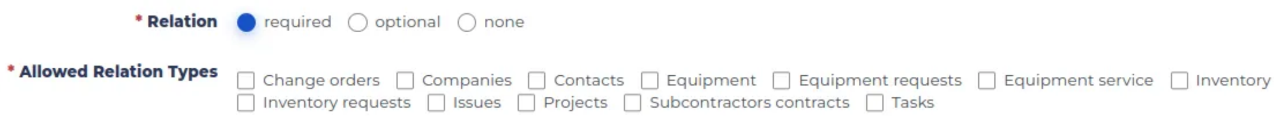
1. Go to the "Document Categories" menu and select the "New" button on the right side of the screen.

2. Fill out the displayed form according to the scheme:

- **Name:** A proprietary name for the newly created document category.

- **Accounting Code:** A special identifier used for registration, recording, or marking a document. It is not a required field and in small/medium-sized companies, it is usually not used.

- **Association:** Defines the record in which this category can be selected.



  - **Required:** The document can only be entered into the selected record, chosen from the available permitted types of associations.

  - **Optional:** It is recommended to assign the document to a specific association, but it is not a mandatory requirement.

  - **None:** Association will not be possible.

- **Only for users with roles:** The ability to specify those roles in the system for which documents belonging to the created category will be visible on the list of records.

> **REMEMBER:** Specifying roles effectively protects against unauthorized persons viewing the documents.

> **NOTE:** Leaving the "Only for users with roles" field empty, documents belonging to that category group will be visible to all users, regardless of their roles.

3. Indicate whether the document should be accounted for after the acceptance of steps or not. This applies to those categories of documents that are related to costs.

4. Leave the “Active” slider on if you want the note category to be visible in the system.

REMEMBER: If you have stopped using a given category, it is recommended to deactivate it by moving the slider. Despite deactivation, documents assigned to this category will remain visible.

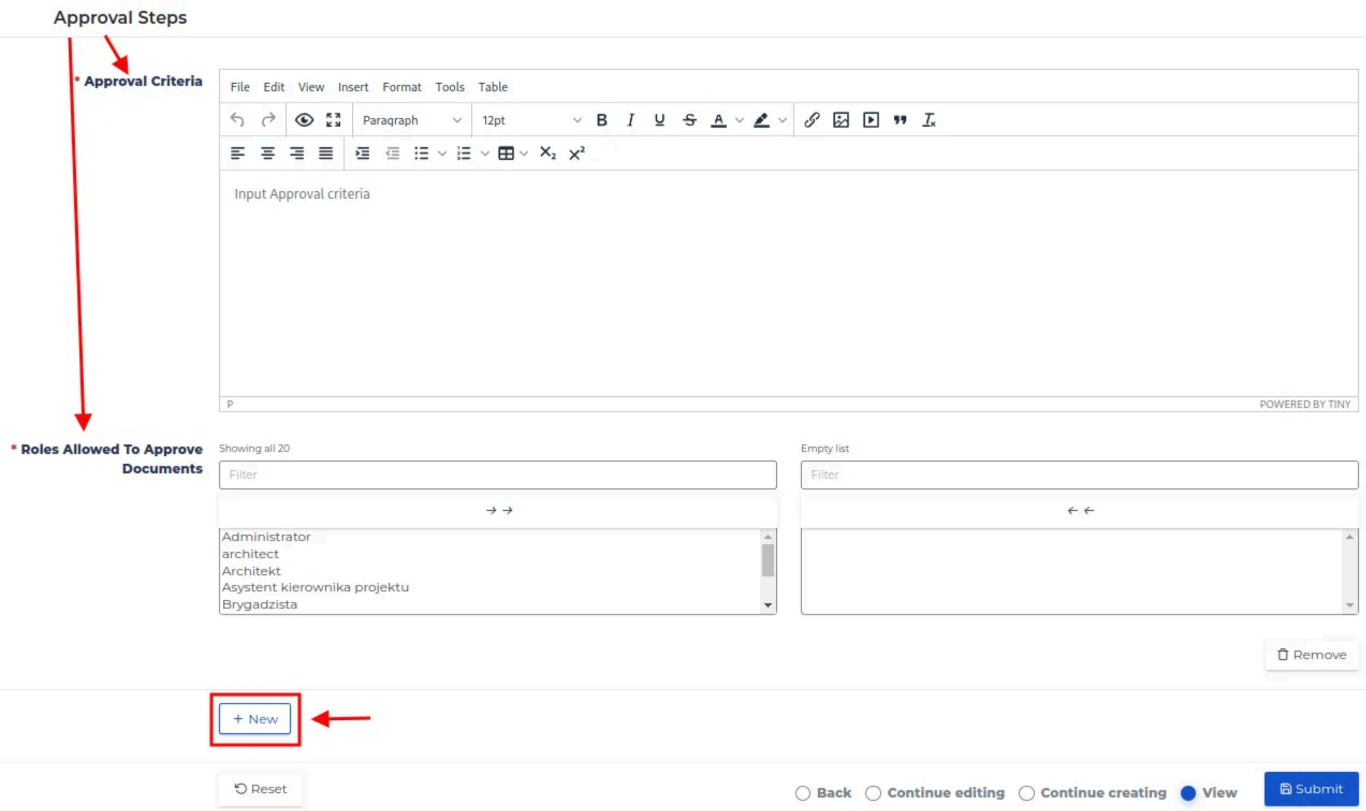
NOTE: You cannot delete a category if there are documents assigned to it.

5. Set at least one acceptance step by filling in the fields:

- **Acceptance Criteria:** A formula defining the scope of confirmation of the requirements necessary to approve the document, e.g., Checked for substantive content, Checked for financial aspects, Checked for the actual enforceability of products and market price.

- **Roles authorized to accept documents:** Users with selected roles will be able to accept the document.

NOTE: In the case of multi-stage document acceptance, add another acceptance step by clicking the “New” button and fill in the required fields.



6. Save the data with the “Confirm” button.

Example illustrating the creation of a document category named “Candidates’ CVs”.

1. Go to the note category creation form in the “Admin - Document Categories” menu.

2. Fill in the fields and set:
    - **Association:** required.
    - **Allowed association types:** Tasks (documents for the created category name can only be added in this record).
    - **Only for users with roles:** HR (entry will only be visible to the HR department).
3. Complete the acceptance steps as a three-stage procedure in which:
    - The created document is first sent to the HR department, which after reviewing and accepting it, sends it back with the message "Verified the candidate's past professional experience for the position of field worker" to the person designated in the second step of acceptance.
    - The document goes to the user with the Project Manager role, who after verification accepts its compliance, with the following message "I confirm the credibility of the candidate regarding his technical knowledge based on the conducted telephone conversation. Please arrange an interview with the candidate".
    - The document returns again to the HR department, where they should arrange a meeting and conclude the process by confirming the step: "An interview meeting has been scheduled".
4. Save the data with the "Confirm" button.

> **REMEMBER:** The conditions specified during the creation of document categories are repeatable, and each procedure for their acceptance saved in them will be identical.

CRM & Organizer - customer service and work organization system in a company

This section will discuss features related to CRM system settings and organization in the company, focusing on three main areas: company groups, contact groups, and employment departments. Well-defined group names in the system facilitate finding companies or contacts and streamline work, e.g., it is easy to find companies providing selected services in order to send an inquiry.

Company Categories

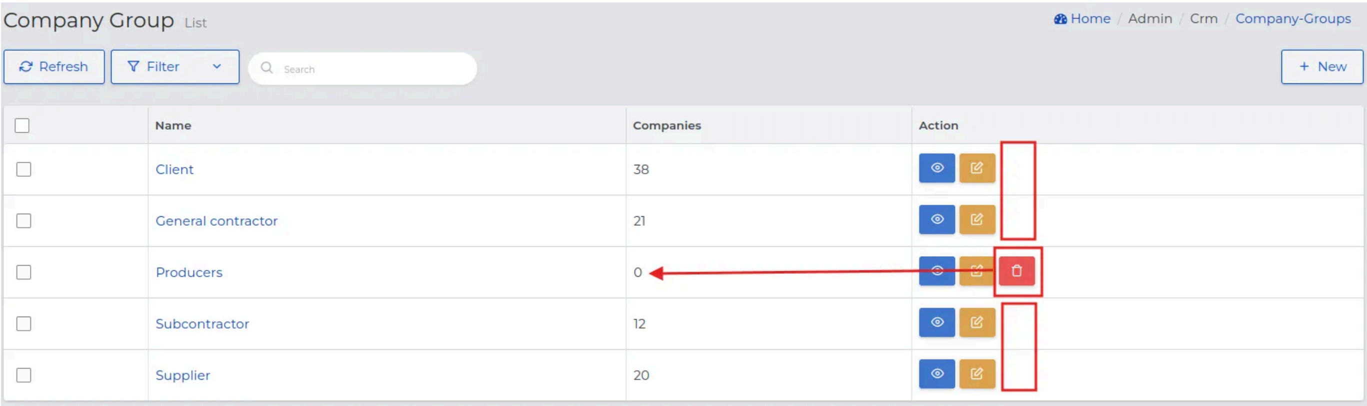
The method of sorting and entering companies into the system, based on their specific groups, allows for an assessment of their functions and makes them easily findable on the list of entries. Standard names for company groups can include, among others, Supplier, Client, Subcontractor, and General Contractor.

Creating company categories is done in the following order:

1. Go to the menu “Admin -> CRM & Organizer -> Company Groups” and verify the names of groups existing in the system.

2. Optionally create new company groups by selecting the “New” button and save them using “Confirm”.

> **REMEMBER:** If you assign at least one contact to a given company group, you will not be able to remove that group from the list.



Contact Groups

In contact groups, in addition to the entered names of system roles, it is worth specifying individual names for contact groups, defining characteristics or behaviors, e.g., couriers, IT specialists, service technicians (if they are not our employees). The way you define their roles can help in later segregating records on lists to find them.

Creating categories of contact groups is done according to the scheme:

1. Go to the menu “Admin -> CRM & Organizer -> Contact Groups” and verify the names of groups existing in the system.

2. Create new groups by selecting the “New” button and save them using “Confirm”.

> **NOTE:** The available “Filter” option in the form means that when creating a contact group, you can configure a filter. Thanks to this, the given contact group will appear on the “filter list”, the scheme and functionality of which have been described in detail here.

> **NOTE:** If you assign at least one contact to a given contact group, you will not be able to remove that group name from the list.

Employment Departments

Employment departments define the nature of the job position to which an employee has been assigned. Department names can be further expanded with so-called brigades or subdivisions if a specific department requires such a division.

In **Step 3**, described in the “First Steps of Configuration” chapter, you conducted initial settings regarding employment departments. Now you can extend the list with additional department names, following the order below:

1. Select from the menu “Admin -> CRM & Organizer -> Departments” and use the “New” button to add another department name.

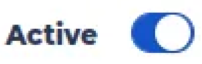
2. Fill out the form, paying attention to the meaning of the fields:

- **Name:** Name for the newly created department

- **Supervisors:** Selected from the list, the supervising employee who will be able to approve days off and requests submitted by employees belonging to this department.

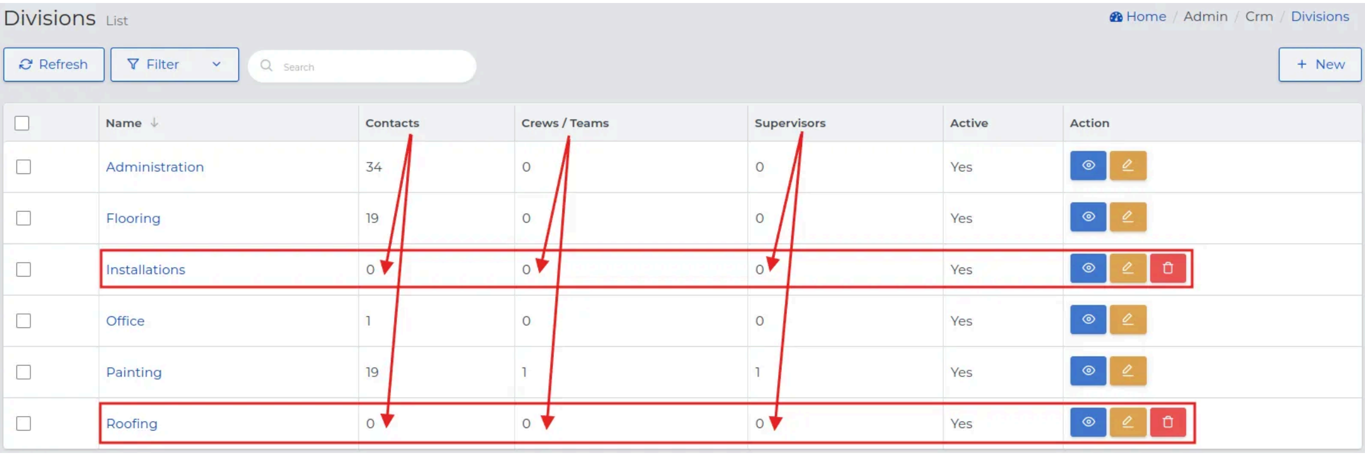
- **Holiday accounting code / On-demand holiday accounting code / Sick leave accounting code / Paid public holiday accounting code:** Accounting numbers associated with the given purpose, stored in the company’s accounting system. This function is generally not used by small and medium-sized companies.

NOTE: If an employee is to be assigned to a department, set the switch to "Active". In the case of department liquidation, you can deactivate it by moving the switch.



3. Save the data in the form by clicking the "Confirm" button.

REMEMBER: You can remove a department name from the list for which no other system records have been assigned.



Conference and Training Rooms

The "Conference and Training Rooms" section allows you to configure the names of rooms dedicated to meetings with clients and employee training at the company's headquarters. Two meetings cannot take place in the same room at the same time. The system will not allow a second meeting to be booked in the same room in a time slot that overlaps with the first meeting.

Creating names for meeting rooms is done in the following order:

1. Select the "Admin -> CRM & Organizer -> Meeting Rooms" section and click the "New" button.

2. Fill out the form with the name of the room and save using "Confirm".

NOTE: If you want the added name of the room to be visible in the meeting form, set the switch to "Active". You always have the option to deactivate it by moving the switch in the opposite direction.

REMEMBER: You can remove from the list a room for which no meeting has been created. If there are meetings in that room, use the room deactivation function to prevent it from being selected for new meetings.

Warehouse

By effectively managing various aspects related to warehousing, you will achieve this by properly configuring the warehouse module. In it, you will define types of equipment, categories of warehouse materials, and their storage locations. If you do this precisely, it will be possible to monitor and control inventories more efficiently, as well as optimize warehouse processes.

Types of equipment

The list of equipment in the warehouse department includes not only materials but also equipment used by employees on projects. Creating equipment categories allows for the segregation of equipment on the list. You can create groups that define their purpose, e.g., manual tools, pneumatic tools, electrical equipment, and construction machinery.

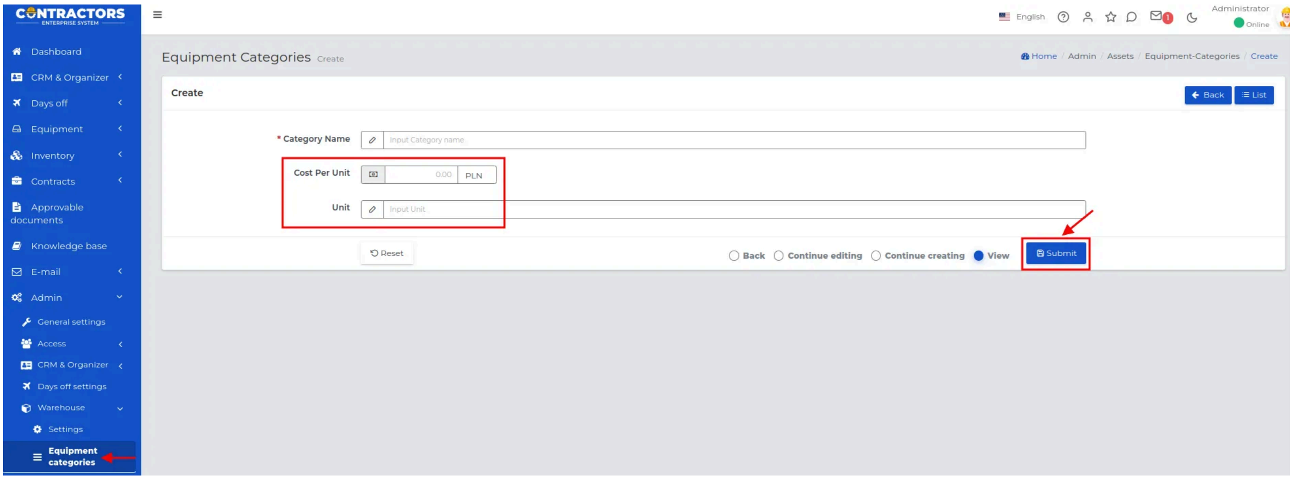
> **NOTE:** Include all tools that are identifiable as equipment, e.g., a drill is equipment, a rarely used hole saw can also be equipment, but small drill bits that wear out relatively quickly are not (we would rather count them as materials consumed on construction or allocated to workers).

> **REMEMBER:** For machines and devices that wear out, you can determine the estimated costs of their operation. Parameters set for one group of equipment apply to all tools entered on its list.

Creating equipment (tool) categories is carried out in a specific order:

1. Go to the menu “Admin -> Warehouse -> Equipment Categories”.
2. Click the “New” button and fill out the form, paying attention to the fields:

- **Category Name:** Specify the name of the category to which the related equipment can be assigned, e.g., drills.
- **Cost per unit:** Set the cost for a unit of equipment operation (applies only to equipment for which this cost can be estimated based on the work hour meter or another unit, e.g., a painting unit).
- **Unit:** Define the measure of the degree of equipment wear, e.g., according to working hours.



3. Save the entered data using the “Confirm” button.

REMEMBER: The cost of using equipment will be included in the project costs where the equipment was used. This value will be visible in the project profitability report.

NOTE: If you assign at least one piece of equipment to a particular equipment group, you will not be able to remove that group from the list. To remove a category, move all equipment to another category.

Inventory Material Categories

You can sort the list of inventory materials by creating groups that specify their purpose. These can include categories such as: construction materials, insulation materials, mortars and adhesives, paints and impregnants, and metal elements.

You will create names for the inventory material categories in the following order:

1. Go to the “Admin -> Warehouse -> Warehouse Categories” menu.

2. Click the “New” button, fill out the form, and save it with the “Confirm” button.

NOTE: If you assign any material to a particular group of inventory materials, it will be impossible to remove that group name from the list. To remove a category, move all materials to another category.

Storage Locations

In the section concerning storage locations, you will define specific warehouses where materials are stored. Naming these places facilitates effective control over inventory and streamlines logistical operations.

> **REMEMBER:** If your company has more than one warehouse with storage space for materials, record this information in the system.

> **NOTE:** Enter information about the Main Warehouse, whose name has been automatically generated and is available in the system.

Creating new storage locations is done in the following order:

1. Open the section named “Admin -> Warehouse -> Storage Locations”.
2. Click the “New” button and fill out the form, including the following fields:
   - **Warehouse name:** Identifies the warehouse on the list.
   - **Address details:** Specify the warehouse location on the map.
3. Save the data with the “Confirm” button.

> **NOTE:** Materials can be stored not only in the warehouse but also at the project site. Registered material storage locations in the system will be visible on the list of warehouse transfers.

Equipment Labels

Creating labels for marking equipment is an essential step that facilitates inventory management as well as the check-in and check-out of equipment. Inventory labels generated by Contractors.es include:

- The name of the equipment or the beginning of the name
- A unique inventory number
- Barcode

The configuration of the equipment label appearance is already automatically set by the system, and you can edit it in the following order:

1. Go to the “Admin -> Warehouse -> Settings” menu and select the “Quick edit” button for the record named “Equipment Label”.

2. Make changes in the form regarding the size of the label and save them with the “Confirm” button.

Scanning equipment labels will significantly speed up warehouse processes. More information about registering and searching for equipment using special labels can be found here.

Contracts

This chapter will discuss the key processes related to the configuration of contract management.

Contract Transaction Parameters

In **Step 8**, described in the "First Steps of Configuration" chapter, you conducted initial settings for contract management. You can review and change them if necessary.

1. Go to the "Admin -> Contracts -> Settings" menu, verify the values in the fields, make changes and save them with each edited form.

   The meaning of the fields on this list is as follows:

   - **Working time: Number of hours in a working day** Set the number of working hours per day for an employee in accordance with company policy and legal regulations.
   - **Unit used for calculating working time:** Determine whether project estimates should be billed according to standard hours or working days. If your company mainly carries out small orders, you may want to change this option to hours.
   - **Default setting for details in PDF estimates:** Decide whether the default PDF estimate should include visible amounts.
   - **Default project manager assistant:** Choose the appropriate "Contact" from the list or allow the field to be automatically filled with the data of the person creating the document.
   - **Default foreman, default project manager, default estimator:** Settings equivalent to the default project manager assistant.
   - **Default department carrying out the project:** Choose a specific "Department" from the list or leave the field blank with the option to select it during the creation of an estimate in the system.
   - **Default margin percentage for materials:** Define the margin for additional materials not included in the estimate.
   - **Default status for a new project:** Choose the default status for a new project depending on how your company acquires orders.
   - **Default type of work for a new project:** Choose the "Type of work" from the list for each new estimate, or leave the field blank with the option to select it later.
   - **Invoicing: Invoice autonumbering:** Set up automatic numbering for subsequent invoices issued in the system.

- **Invoicing: Default VAT rate:** Specify the default VAT rate based on applicable tax regulations.
- **Invoicing: Default footer text:** Add payment information and bank transfer details.
- **Invoicing: Default due date:** Determine the default due date for the buyer's financial obligation.
- **Invoicing: Default invoice type:** Choose the method of accounting for work stages.
- **Invoicing: Last automatically generated invoice number:** If you use auto-numbering and have previously used a different invoicing system, enter the last invoice number issued in the other system to continue the numbering.
- **Invoicing: Invoice auto-numbering prefix:** Establish the numbering format for invoices covered by auto-numbering.
- **Features: Show fields related to material samples:** Display fields related to the verification of materials intended for the project.
- **Features: Show the "Project Accounting Identifier" field:** Display a field allowing the entry of an accounting number for the project.
- **Features: Show fields in the project related to insurance:** Display fields allowing the determination of the required insurance coverage.
- **Features: Show in the project fields related to the general contractor:** Display the entity responsible for the comprehensive execution of the project.
- **Features: Show in the project the field for the date of the pre-construction audit:** Display a field allowing the entry of the date for the verification of the actual state before starting the project.
- **Features: Show in the project the field for the date of receiving drawings:** Display a field allowing the completion of the date when the documentation was provided by the client.
- **Features: Show in the project the field related to the safety data sheet of hazardous substances:** Display fields related to hazardous substances to be used in the project.
- **Features: Show in the project the field related to material verification:** Display fields allowing confirmation of material compliance with the project.
- **Features: Show in the project the field for transferring the offer to accounting:** Display a field allowing the entry of the date of transferring the offer to accounting in order to create a project record in the accounting software.
- **Features: Allow setting a project manager assistant:** Display a field that allows entering a project manager assistant.
- **Features: Allow setting a project manager:** Display a field that allows entering a project manager.

Types of Projects

The areas defining the company's activity are otherwise known as the types of projects in which the company specializes. In **Step 10**, described in the "First Steps of Configuration" chapter, you made the initial system settings. Depending on the nature of the company, the types of projects can vary, e.g., roof assembly, plumbing and electrical installations, interior finishing works, renovations, etc.

Adding new types of projects to the list is done according to the following scheme:

1. Select the "Admin -> Contracts -> Types of Projects" section, verify the types of work visible on the list and add another name using the "New" button.

2. Fill in the form and save with "Confirm".

> **NOTE:** If the type of project is to be visible in the project settings, set the switch to "Active". You can always deactivate it by moving it in the opposite direction.

Work Scopes

Work scopes are used when estimating projects. In **Step 11**, described in the "First Steps of Configuration" chapter, you made their initial settings. Depending on the company's profile, the work scopes can be as follows:

- **Roof assembly:** Roof structure, sheathing, membrane covering, felt covering, tile laying, gutter and downpipe installation.

- **Plumbing and electrical installations:** Laying water and sewage systems, electrical installation assembly, cable laying, electrical distribution board execution.

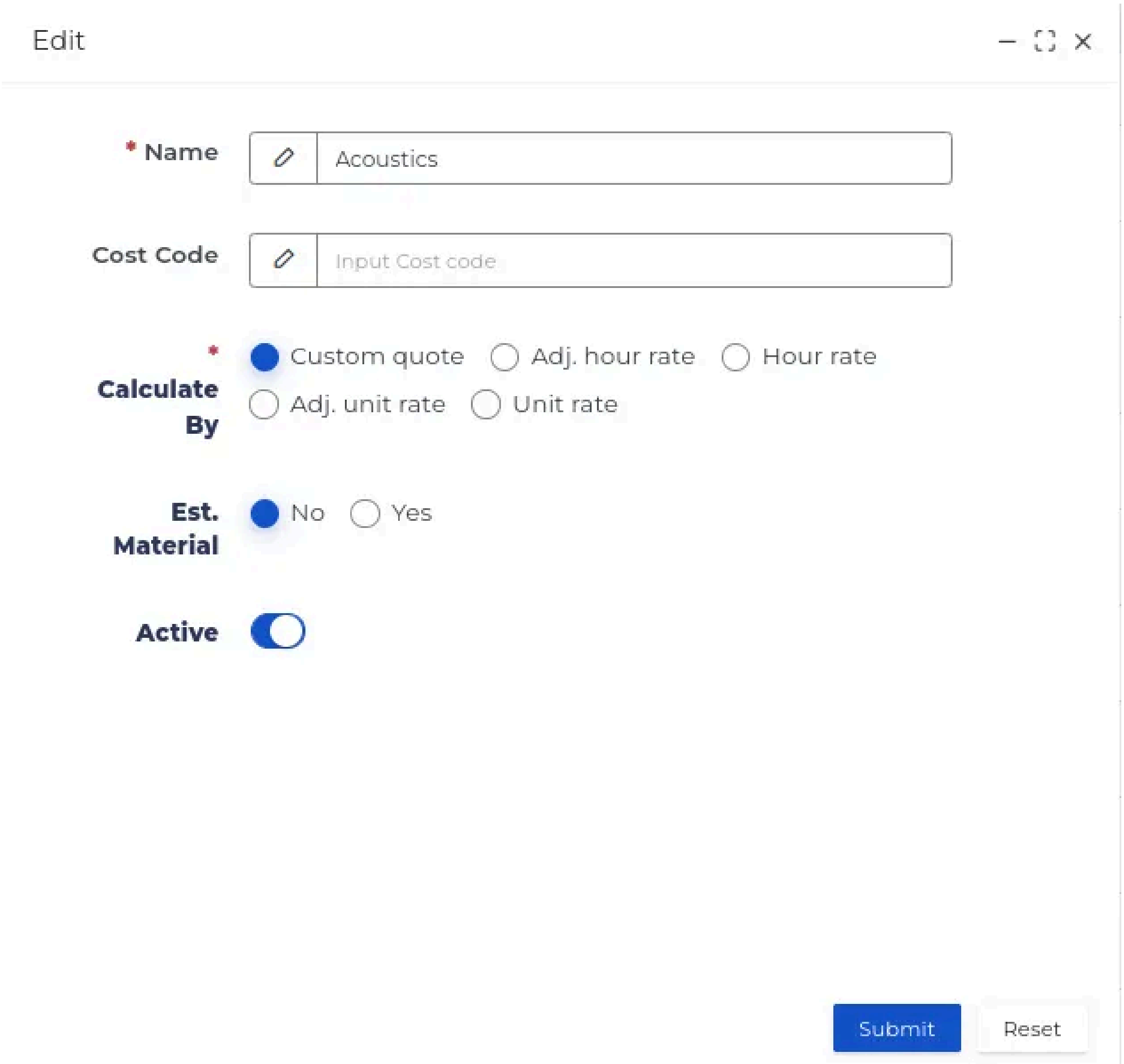
- **Interior finishing works:** Painting walls, installing floor panels, internal door installation.

> **NOTE:** The work scopes will determine the way they are priced for the service performed. According to these settings, the proposed costs for the estimate will be calculated.

Adding new work scopes to the list is done according to the following scheme:

1. Select the "Admin -> Contracts -> Work Scopes" section, verify the work scopes visible on the list, and add another name using the "New" button.

2. Define the pricing method for it by choosing one from the list available. More about the pricing available in the system can be found here.



NOTE: If the client usually provides materials for the construction on their own or you want to price it individually, set the switch to "No" for the "Estimated cost of materials" field.

REMEMBER: The selected work scope along with the pricing conditions will be available during its entry into the system, as long as the switch in the "Active" field is turned on.

3. Save the form with the "Confirm" button.

If you are interested in the process of creating a quote in the system and the possibility of later modifying the settings, familiarize yourself with the detailed description available here.

Work Planner Settings

Effective time management of work includes issues related to precise calculation of employee salaries. In **Step 9**, described in the "First Steps of Configuration" chapter, you made initial settings, which you can now change if necessary.

1. Go to the "Admin -> Contracts -> Planner Settings" menu, verify the values in the fields, make changes and save them with each edited form.

2. The meaning of the fields on this list is as follows:

    - **Time of free breakfast break:** This is the time deducted from the working time designated for a breakfast break.

> **NOTE:** In Poland, employees are entitled to a paid breakfast break, so enter the value "0" in this field. For countries where the breakfast break is not paid, specify the contractual number of minutes of the break for which no remuneration is due.

    - **Time of sending notifications:** Determines the hour at which the employee receives information about the upcoming work assignment, i.e., the place and time to report to the project.

> **REMEMBER:** For the employee to receive notifications about work assignments, it is necessary to install the Contractors.es mobile application on the employee's mobile phone.

- **Default working hours:** The range of working hours on different days of the week.

> **NOTE:** If an employee is entitled to a free breakfast break, add it here.

    - **Salary calculation:** Determinations regarding compensation for time worked during the week, taking into account the basic hourly rate and overtime.

    > **NOTE:** You can apply individual rates for a specific employee by editing the employee's contact - HR tab.

    - **Warning of being late or leaving early:** Time margin (in minutes), after which the system marks such an entry warning of the situation that has occurred.

    - **Warning of being too far from the project:** Specifies the distance, beyond which the work assignment record will be marked as logging in outside the project area.

    > **REMEMBER:** Limits informing the supervisor about being late, leaving early, and moving away from the project site are recorded through the employee's mobile application during their logging in and out of work. This data is helpful in assessing the employee's reliability.

    - **Calendar hour range:** Includes the range of hours visible on the calendar, giving the possibility to assign work within this time frame.

Types of Issues

Reporting issues on projects is a key element affecting their effective management. Thanks to the quick identification of potential difficulties, it will be possible to take the necessary corrective actions. Defining the types of issues in the system will allow for their efficient segregation. Employees, when reporting an issue, choose the appropriate category from the list, which enables the supervisor to determine what problems are most common, and what may require change.

Construction issues (not related to weather) may include, among others:

- Delays in material deliveries.
- Non-compliance with building regulations.
- Employment of workers.
- Equipment failures.
- Conflicts within the team.
- Poor project management.

You can add contractual issue categories in the following way:

1. Select the “Admin -> Contracts -> Types of Issues” section, verify the names of issues visible on the list, and add more using the “New” button.

> **NOTE:** If the issue category is to be visible in other system sections, set the toggle to “Active”. You can always deactivate it by sliding it the other way.

2. Save the form with the “Submit” button.

> **NOTE:** Reporting weather-related issues by employees is possible through the mobile application. Weather data is automatically retrieved, which further simplifies and authenticates the report.

> **REMEMBER:** Precisely defining potential construction problems that are beyond our control can be useful in case of disputes with the client. It constitutes significant evidence in the event of failure to meet deadlines, which could result in a penalty.

Categories of Inspections on Projects

Conducting control visits is within the competence of selected employees, and the purpose of their designation can vary.

Types of control visits may include:

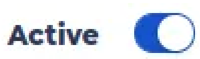
- **Building Inspections:** Allow for checking the compliance of the execution with the building design and applicable regulations. Inspections can cover different stages of construction.
- **Technical Visits:** Are focused on technical aspects and project specifications. They enable a coordinated analysis of the technical team's actions.
- **Safety Visits:** Focus on the safety aspects of employees and compliance with OHS standards. They include risk assessment and the effectiveness of preventive measures.
- **Problem Visits:** Serve to analyze and solve problems encountered during project implementation. They allow for a quick response to potential complications.
- **Control Visits:** Serve for regular monitoring of construction progress. During control visits, timeliness, quality of work, and adherence to the planned schedule can be assessed.

You can edit or add the types of visits available in the system according to the scheme:

1. Select the "Admin -> Contracts -> Types of Site Visits" section, verify the names visible on the list, and add more using the "New" button.

> **NOTE:** If you want the employee to fill out the "Estimation Accuracy and Work Progress" form during the inspection visit, set the switch to "Active".

> **REMEMBER:** The selected inspection category will be available during its entry into the system as long as the switch in the "Active" field is turned on.



2. Save the form with the "Confirm" button.

> **NOTE:** The visit to the project will be visible on the employee's CRM calendar.

Inquiry Sources

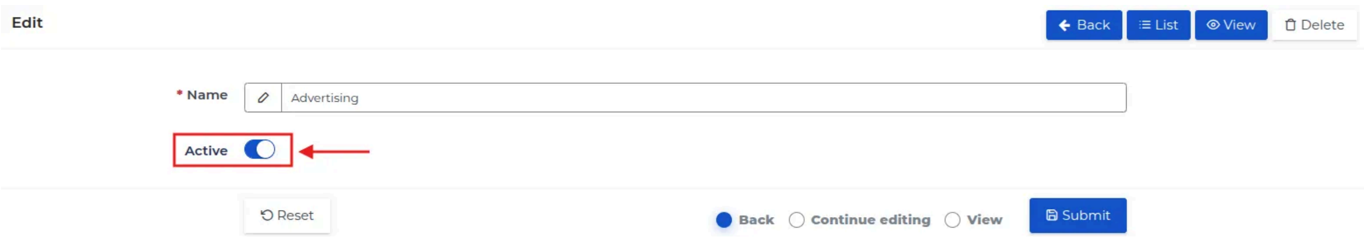
Tagging inquiry sources in project records helps better understand which communication channels are most effective, allowing you to focus resources on the most efficient methods of acquiring clients.

The available types of inquiry sources in the system can be edited or added as follows:

1. Go to Admin → Contracts → Referrers, review the list of existing names, and add new ones by clicking “New”, or edit existing names using “Quick Edit”.
2. Save the creation or modification form by clicking “Confirm”.

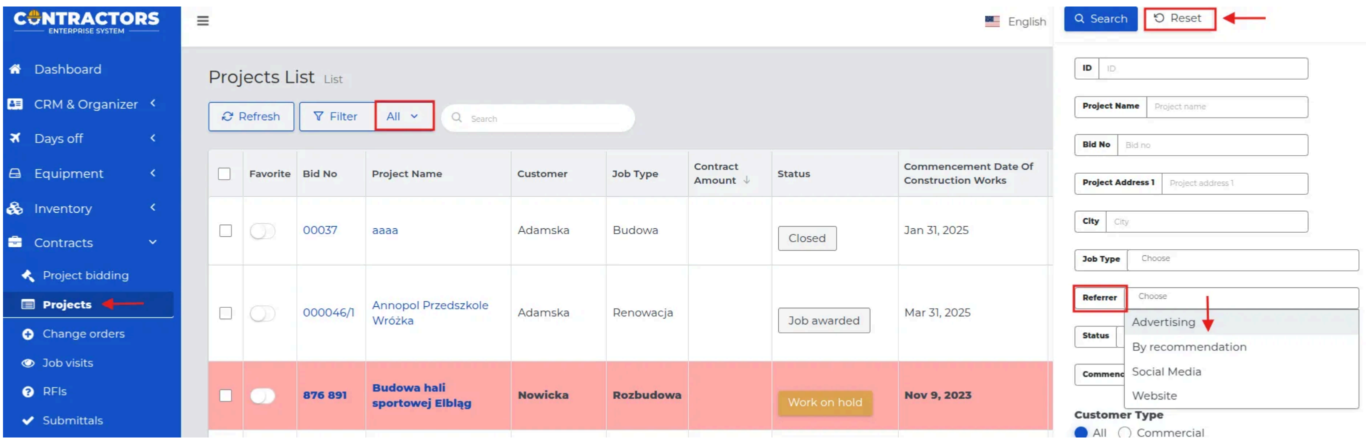
> **NOTE:** The system automatically sets the default inquiry sources as: “Advertising”, “Social Media”, “Website”, and “Referral”.

> **REMEMBER:** A selected category will remain available for use in the system as long as the “Active” toggle is enabled.



To check which inquiry source is the most effective, follow these steps:

1. Go to the “Contracts → Projects” section, reset the filters by clicking the “Undo changes” button, and then display all records in the list.



2. In the “Inquiry Source” field, select the communication channel you are interested in and click the “Search” button.

> **NOTE:** You can select more than one inquiry source for analysis, but the results will not display individual data for each source.

3. Only the selected entries will remain in the list, and their total count will be displayed at the bottom of the list.

> **REMEMBER:** With detailed filtering, you can further narrow down the list, for example, by date range, project type, or groups of people related to a specific contract.

Additional project fieldsections

Additional fields in projects allow you to customize the system to the specific needs of various implementations. They serve to store important data, facilitate searching, filtering, and analyzing information, ensuring better organization and control over the project.

Among the available settings for each field, there are the following options:

- **Editable (required)** – the user must enter a value in order to proceed.
- **Editable** – the field can be edited, but it is not mandatory.
- **Visible, non-editable** – the field is displayed but cannot be modified.
- **Hidden** – the field is not visible to the user.

> **NOTE:** Additional project fields are visible in the “Details” tab. Depending on the configuration, they may be mandatory or optional to complete.

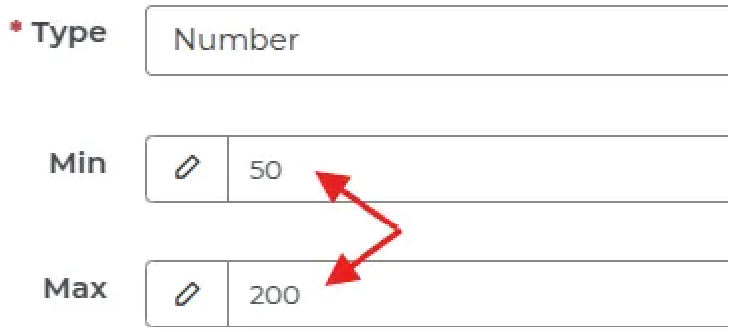
To create “Additional project fields,” follow these steps:

1. Go to the “Admin -> Contracts -> Additional Project Fields” menu and click the “New” button.
2. Complete the form, where the meaning of the fields is as follows:

- **Name:** Example title of the field with variables, e.g. Roof type, Infrastructure, Access road.
- **Type:** Method of entering data by the logged-in user.
    - **Text** – any entry in the field, which can be marked as “Unique value” to prevent duplication of names or document numbers in concurrently ongoing projects.

> **NOTE:** If “Unique value” is not enabled, entries in the “Short text” field may repeat across different projects.

    - **Number** - the range of values within which the variable must fall.



NOTE: If the data entered by the user exceeds the allowed range, the system will display an appropriate message.

- **Decimal** - a value in the decimal system, functioning analogously to the “Integer number”.
- **Boolean** - a choice between two available options Yes/No.

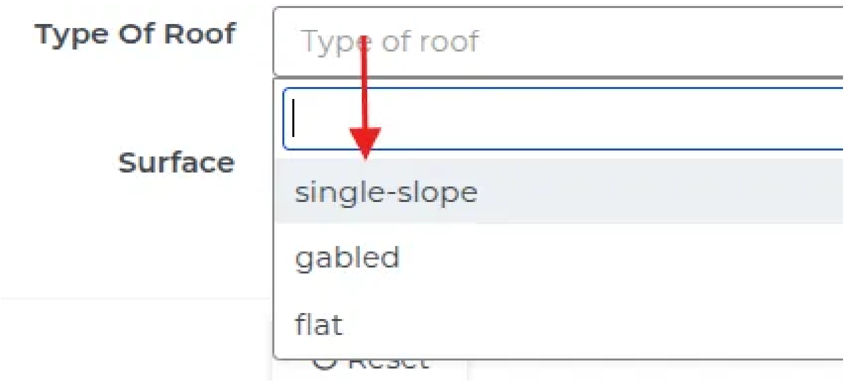
REMEMBER: With this setting, the user will select one of the options using the activity slider.

- **Date** – selection of a date from the calendar, allowing it to be associated with the project.
- **Date and Time** – selection of a date from the calendar along with the associated time.

REMEMBER: The user can select both a date and a time using the clock icon located beneath the calendar.

- **Textarea** – a field allowing the entry of a detailed input containing multiple lines of text.
- **Select** – the ability to select one option from those specified in the “Possible options” field.

REMEMBER: With this setting, the user will be able to select one of the “Possible options” from the list.

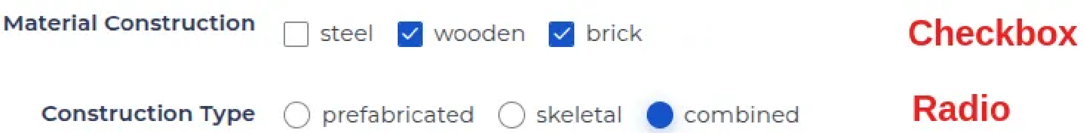


- **Multiple select** - the ability to select more than one option from the options specified in the “Possible options” field.

> **REMEMBER:** After selecting one option, the user will be able to select another from the list or remove the currently selected option using the “X” button.

- **Radio and Checkbox** - these work similarly to “Select Lists,” but the way they are selected differs.

> **REMEMBER:** In this case, the user selects one or more options by clicking on them without expanding the list.



- **Reference:** Specifies where the created custom fields will be visible within the system.
  - **Project Offering & Project** – fields available both at the offering stage and during project execution.
  - **Project Offer & Project** – fields visible in the offer and later during the execution stage.
  - **Project Only** – fields will only appear in the project view.

> **NOTE:** Depending on the assigned location, custom fields will be available at different offering, offer, and project statuses.

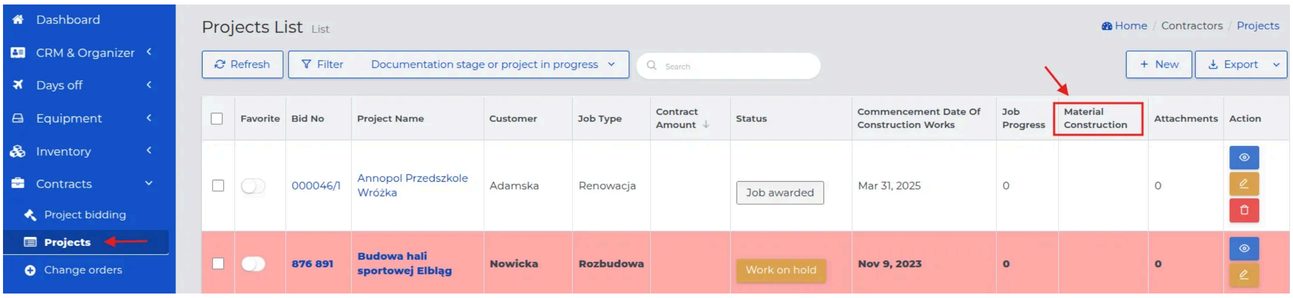
3. Check all available statuses and define their level of availability.

NOTE: If the first status of the offer or project remains visible, it will not be possible to hide the subsequent statuses.

REMEMBER: The custom project field will only become visible once the corresponding status of the project offer or project is reached, and the preceding statuses have been hidden.

4. Set the activity of the created custom field in the selected reference by toggling the switch to "Yes."

NOTE: If you want the name of the added custom field to appear in the record list column, enable the "Show in list" option.



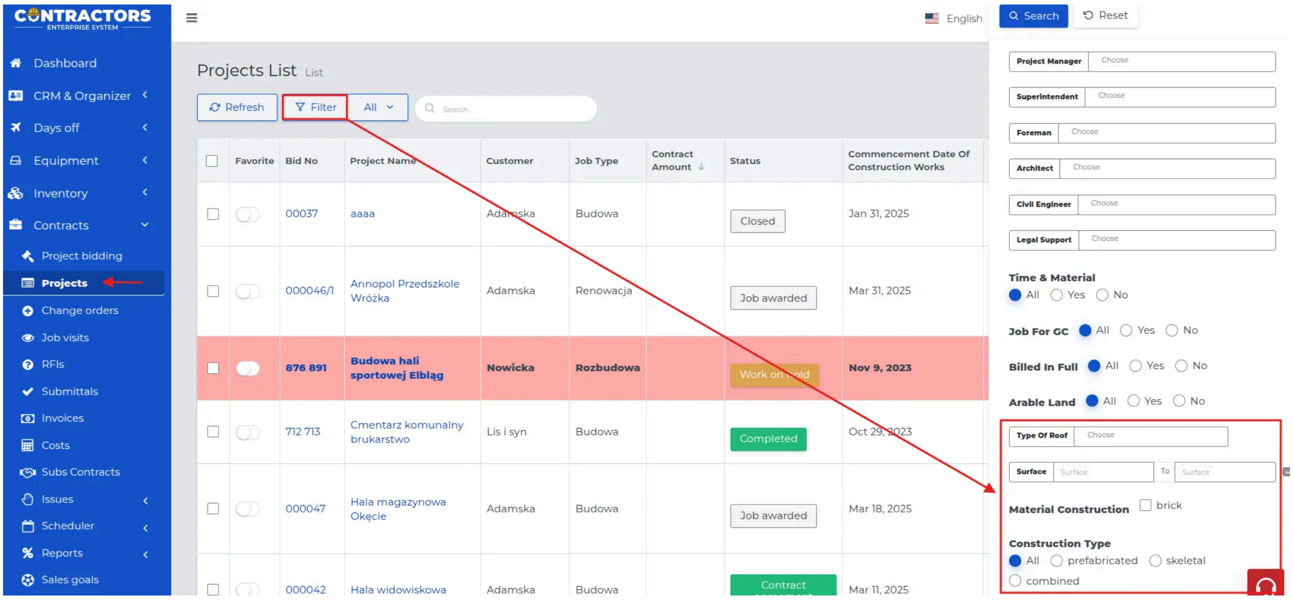
NOTE: A custom field cannot be removed from the list if it has been linked to at least one record in the system.

REMEMBER: If an option has been selected in at least one project, changing its name will make the old name available in the projects where it was previously used.

REMEMBER: Any update to the names of custom fields, for which their activity has been set, will be available in references, regardless of when the record was added in the system.

5. Save changes using the "Confirm" button.

REMEMBER: The created additional fields will be available in the "Detailed Filtering" list, allowing for easy searching of desired records by marking a specific variable.



Dashboard

For users performing the same roles in the system, it is possible to configure dashboards with identical applets. After logging into their account, users can edit these applets and change the template settings saved by the administrator. In special cases, the administrator can also adjust the applets on the dashboard of a specific user.

> **REMEMBER:** Properly adjusting applets for selected roles in the system will allow users to more efficiently use the necessary software functions.

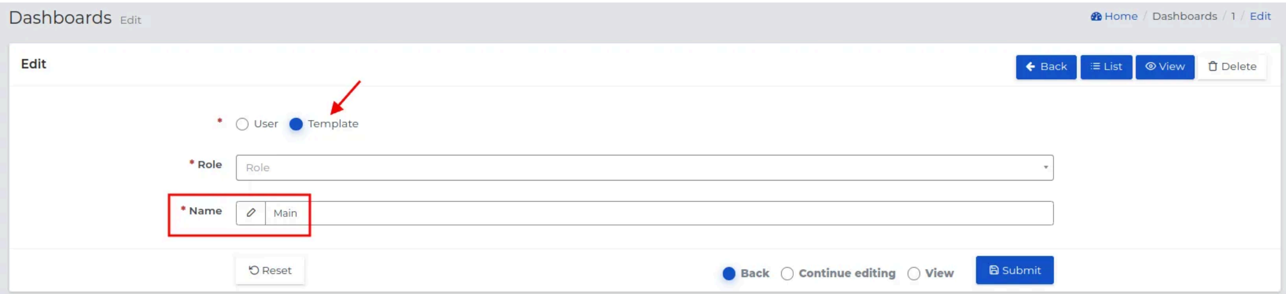
Template Settings

Template settings are ready-made layouts and configurations of applets that can be applied to a group of users with similar needs in the system. Thanks to them, the administrator can quickly adjust the application interface to specific requirements, ensuring a consistent work environment for users.

> **NOTE:** Changing the template settings will not update the existing user dashboards. The change will only be visible to new users with the roles selected in the template.

Creating template settings is done in the following order:

1. Go to the dashboard editing and with the selected role in the system, choose the "Edit" action button.
2. Make sure that the "Template" option has been marked for the given role.



3. In the template creation form, you can also change the name of the tab on the dashboard visible to users from this group.
4. Save the settings with the "Confirm" button.
5. With the selected role on the list, click the "View" action button to verify whether the applets meet the users' needs.
6. Optionally make changes to them.
7. Return to the main list with records using the "Back" button.

8. Modify the appearance of the dashboard for the remaining roles in the system, proceeding in the same way.

> **REMEMBER:** If you add a new role in the system, you will not be able to create a template setting for it directly from the list after selecting the dashboard editing option. Instead, you will need to click the “New” button above the list, select a new role from the list, and then continue creating the template according to the description above.

Individual Settings

The administrator can customize applets on the desktop of a specific user selected from the list if there is a need.

Creating a desktop setting for a selected person proceeds as follows:

1. Go to the desktops editing, find the desktop of the selected user that interests you and click “View” or select the “New” button above the list of records.

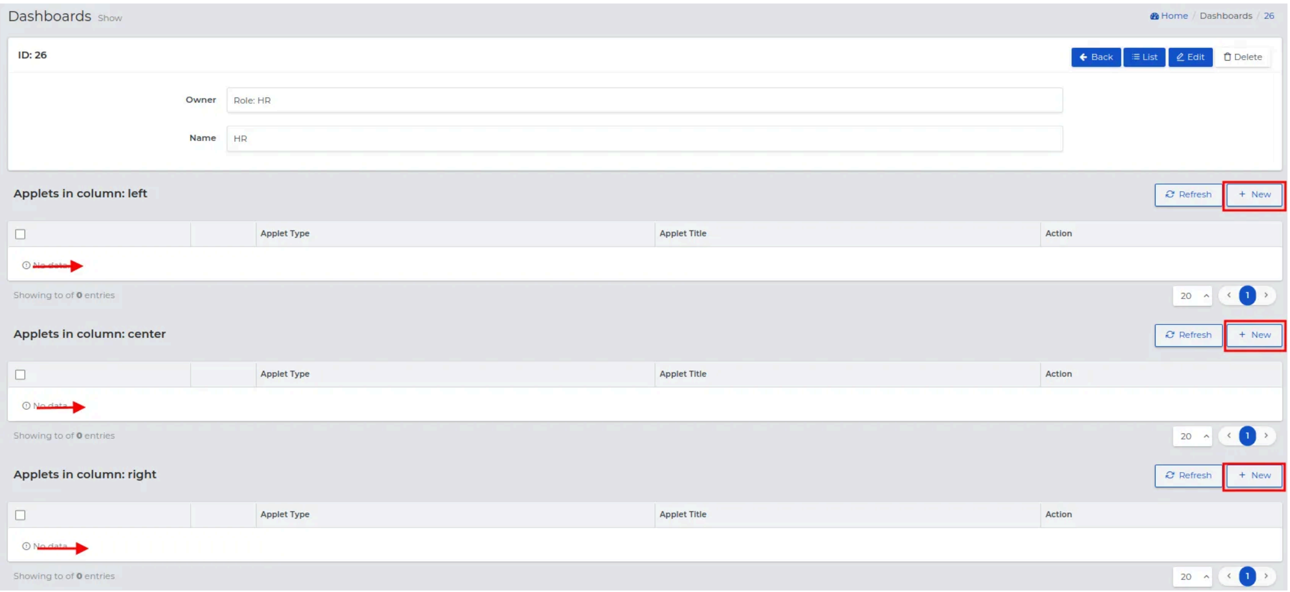
2. If you are creating a new desktop, mark the “User” option and fill out the form paying attention to the fields:

    - **User:** Selected from the list user for whom you want to make desktop settings.

    - **Name:** The name of the tab to be visible on their desktop.

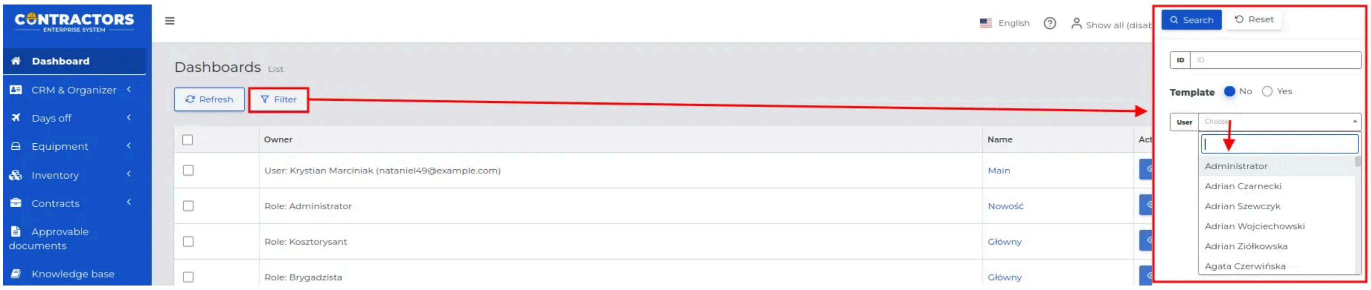
   Save the data with the “Confirm” button.

3. Choose applets for the appropriate columns by clicking “New” and save the creation forms.



> **NOTE:** When creating a new desktop for a selected user, no applets suggested by the system will be added to the desktop, according to the role they perform.

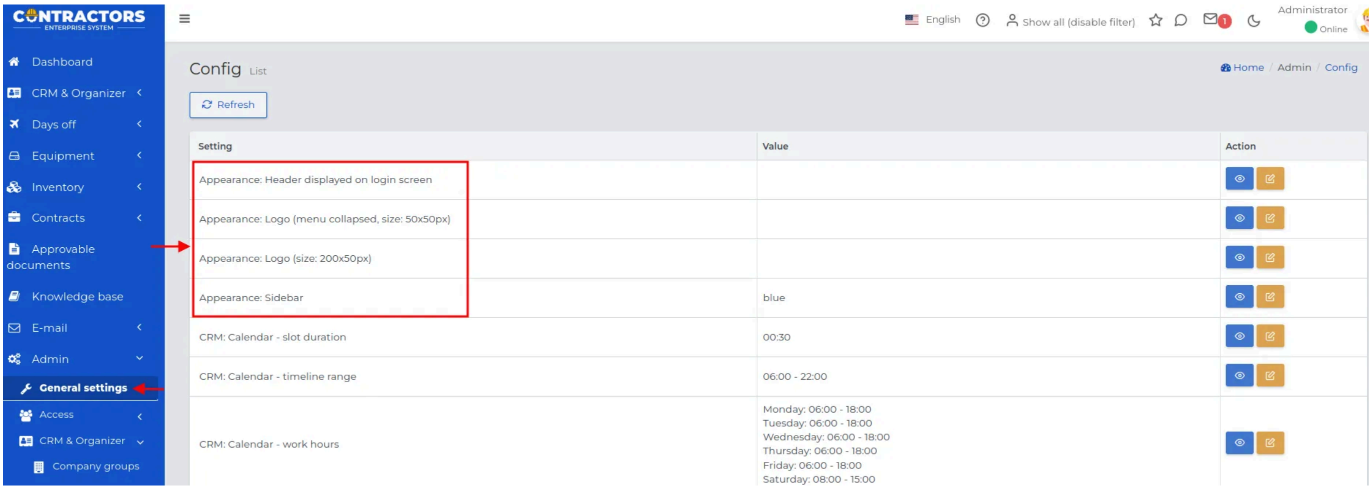
To find the desktop of the user or template you are interested in, use the filtering function.



> **REMEMBER:** When filtering records, always first determine whether the search should concern a template with a selected role or a user selected from the list.

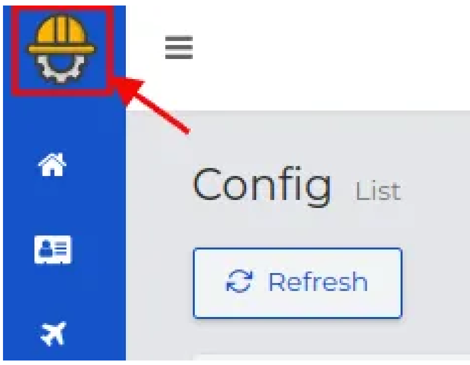
Appearance Settings

In **Step 1**, described in the “First Steps of Configuration” chapter, you made initial system appearance settings. You can review them again and make changes if there is a need.



Appearance settings are available in the “Admin -> General Settings” section and concern:

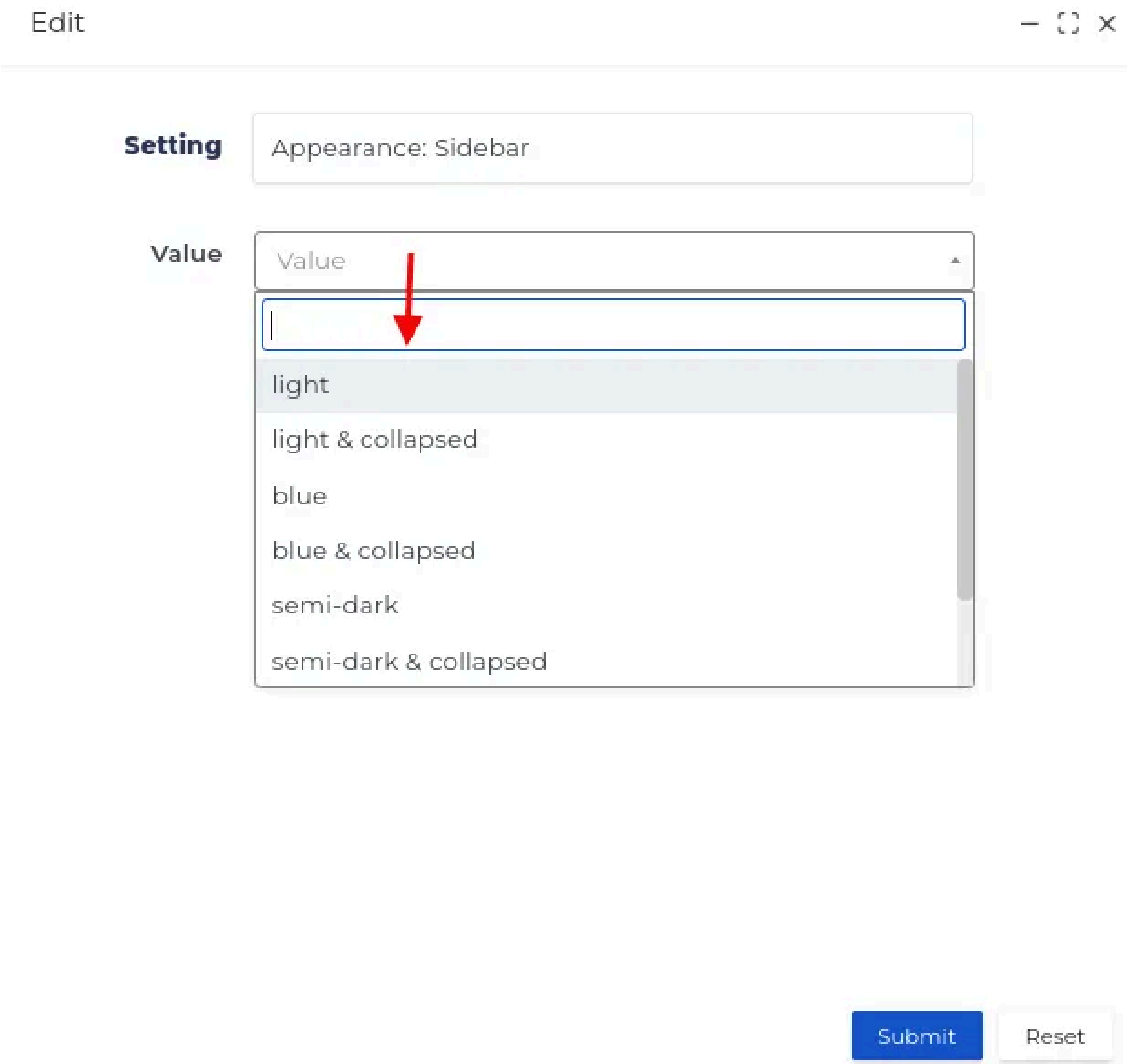
- **Appearance: Logo (collapsed menu, size: 50x50px):** Logo graphic visible with the menu collapsed.



- **Appearance: Logo (size: 200x50px):** Logo graphic visible with the menu expanded.

- **Appearance: Header displayed on the login screen:** Text visible when logging into the system, it can be, for example, a motto, quote, or message. It will also be visible in the title of the browser tab.

- **Appearance: Sidebar:** Color for the main menu selected from the available list.



> **NOTE:** These settings are not mandatory. Once entered, they will be identical for all system users.

> **REMEMBER:** The colors of the desktop widgets are adjusted according to the settings during their creation.

Frequently Asked Questions

1. **How can I set up my company's logo to be visible in the system?**

   You can set up your company's logo in the admin panel in the "General Settings" section. You can set a logo for both the collapsed and expanded menu for which specific graphic file sizes have been determined.

2. **How can I import data into the system?**

   Prepare the data in the correct format and use the data import function, the order of which has been described in more detail here. Thanks to the data import, you can quickly and easily fill in data in selected system sections.

3. **Which system sections can I import, and which can I not?**

   The system allows you to import data only into the groups: "Contacts", "Companies", "Equipment", and "Materials Warehouse". In these groups, statistically, there may be the most data to import.

4. **How will I know that the data import has been completed?**

   Every correctly imported data file will receive a "Completed" status on the list of imported records. If you do not set the column mapping correctly, the system will not allow the import to be performed.

5. **How do I create a user account in the system?**

   To create a user account, go to the "CRM -> Employees" menu, enter the employee on the list and mark their employment in the company in the "HR" tab. Then you will be able to create a user account for the system according to the scheme described here.

6. **What are the differences between "Public", "Public, read-only", and "Private" permissions when creating records?**

   "Public" permissions allow anyone with the appropriate system permissions to edit, delete, and view such a record. "Public, read-only" allows only viewing without the ability to edit or delete them. "Private" permissions mean that records are visible only to the author, protecting them from other users.

7. **How to assign an employee role in the system?**

   Go to user editing and set the expected roles for them. System roles (default) are synchronized with employee contact groups, so while editing an employee's profile in the "General" tab, you can also select the group names they should belong to, and in this way, you will also change their roles. You can assign an employee to many groups/roles at the same time.

8. **I want to set user access to the system for a specific time, how do I do that?**

   Simply specify a specific date in the "Account Expiration" field when creating a user account.

9. **What is the "User Activity History" for?**

"User Activity History" allows you to track which users made changes, when it was, and in which system records. Additionally, thanks to sorting records on the list, you can quickly find the entry you are interested in. You can read more about the functionality of "User Activity History" here.

10. **How to create note categories and control access to them?**

    You can create note categories according to the scheme described here. After creating a category, you can specify in the forms which user roles can have access to them. This will ensure the protection of the content of notes from unauthorized persons.

11. **Why can't I delete a selected note category name from the list available?**

    You cannot delete a category if at least one association with it has been recorded in the system, i.e., there is a note using this category.

12. **Can I skip approval steps when creating document categories?**

    No, for each type of document entered into the system, it is necessary to define at least one approval step.

13. **Can I remove a group of companies to which one contact I no longer need is assigned?**

    No, if you assign even one contact to a given group of companies, you will not be able to remove this group from the list. You can only deactivate the display of its name on the list of available company group names in the future.

14. **Why is the employment department I created not visible on the selectable list when creating an account for a user in the system?**

    Make sure that you have marked the department as active in the other system sections. You can find more on this topic here.

15. **Can I specify different operating costs for equipment belonging to the same category of equipment?**

    You cannot enter operating costs for each piece of equipment separately. Equipment entered into one category should have an averaged common value that determines its degree of wear and tear. If you want to change this, create a new category name for those pieces of equipment where the degree of wear differs from the rest on the current list.

16. **I have several warehouses where building materials are stored. Can I add other storage locations in the system and in which sections might they be useful?**

    Yes, you can mark additional storage locations in the system according to the description contained here. These additional places will prove useful in all sections related to the Warehouse department. Thanks to this, you will be able to:

    - place and store goods in locations where there is more available space,
    - register the consumption and demand for materials, regardless of their storage location,
    - more efficiently carry out the inventory process, as the quantity of goods will be concentrated in one warehouse,
    - make easy warehouse transfers in case of transporting goods between different storage locations.

17. **I want to change the work assignment for an employee for tomorrow. Will they receive a notification?**

Yes, an employee using the mobile application will receive a notification about the change in work assignment if they have already received a notification for the assignment for tomorrow sent with one day's notice. If they have not yet received a notification, they will receive it only once at the selected time. You can set the time at which such notifications are sent in the planner settings named "Notification sending time" - more information is available here.

18. **Can I control an employee's presence at work, their time of presence, and location in relation to the assigned task?**

    Yes, if you configure the appropriate alerts, described in detail here. For all employees using the mobile app, an entry related to their presence will be recorded.

19. **How can defining categories of weather-independent problems be useful to me?**

    Precisely defining potential construction problems that are beyond our control can be useful in case of disputes. It constitutes significant evidence in the event of non-fulfillment of contract conditions, such as deadlines or material quality, which could result in a penalty. If we can prove that our company is not to blame for the current situation, we can avoid contractual penalties.

20. **What does the concept of "Estimation accuracy and work progress" refer to when creating visit categories?**

    "Estimation accuracy and work progress" in the visit category refers to the assessment of the precision of the initial cost estimates and monitoring the compliance of work progress with the original time and budget plan of a specific construction project. An employee designated as a visitor will be required to provide answers in the system to questions regarding this assessment.

21. **Can every project be submitted for inspection?**

    Yes, every project, regardless of its status, can be submitted for inspection.

22. **Can I customize dashboards for users performing the same roles in the system?**

    Yes, it is possible to configure dashboards with identical applets for users with the same roles. However, this must be done before creating users with those roles or you must edit existing dashboards for selected users.

23. **Can users edit applets on their dashboard?**

    Yes, after logging into their account, users can edit applets and change their settings.

24. **Can I customize applets on the dashboard for a specific user?** Yes, in special cases it is possible to customize the desktop applets for a selected user. To do this, you need to go to the desktop editing of the selected user and adjust the applets on it.

25. **What will be visible if I don't place the company logo graphics in the global settings?**

    If you do not add the company logo graphics in the global settings, the system will display the default Contractors.es logo in those places.

26. **How can I ensure that the value of an additional field will not be duplicated across different projects?**

    When creating a field, select the "Unique value" option. This will prevent the duplication of values (example: document numbers) in the projects.

27. **Can I change the name of an existing additional field?**

    Yes, you can change the name of existing fields, but keep in mind that if the field has already been used in a project, the old name will still be available in those projects where it was previously used. The changed field name will be updated in the system in references, regardless of the date the record was entered.

28. **Can I choose more than one inquiry source for a newly created project?**

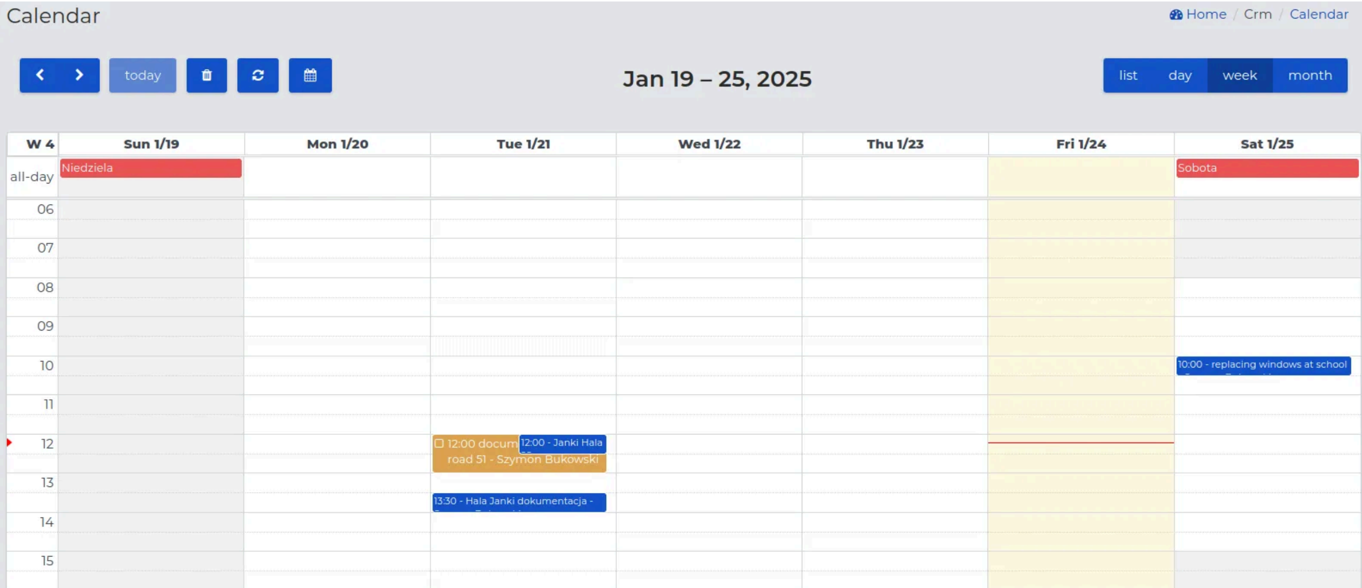
    No, you can assign only one inquiry source to a newly created project.

29. **How can I check which inquiry sources are most frequently selected for projects and what their effectiveness is?**

    Reset the filters, select "Inquiry Source" in the project list, and click "Search." After retrieving the records, you can check the number of results that meet the criteria, which will help assess effectiveness.

Calendar View

In the “Calendar” section, users gain access to a key functionality of the system, which allows tracking tasks, meetings, calls, and inspection visits. Thanks to a clear layout in the form of colorful cards, users can quickly and conveniently plan their duties and meetings for specific days.



The functions available in this module include:

- Adding a new event.
- Copying events.
- Moving events on the calendar.
- Viewing other users’ events.
- Deleting events from the calendar.

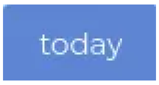
> **REMEMBER:** Meetings, tasks, and phone calls visible after being added to the calendar are available on the record lists in the “CRM -> Meetings/Calls/Tasks” menu.

The functional buttons visible on the system users’ calendars are responsible for:

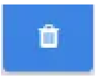
1. Selecting the period for displaying data on the calendar.

2. Switching the calendar period back or forward, taking into account the currently set display period.

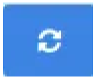
3. Going to the calendar period that includes today’s date.



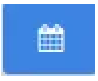
4. Deleting items from the calendar.



5. Refreshing data and updating displayed information. The view is automatically updated considering the default time interval. Using this button, we can force a refresh.



6. Changing settings for what types of events to display and settings for importing/exporting calendars in iCalendar (ICS) format - using this function, it is possible to set up displaying events from Google Calendar / Office 365, etc., and displaying events from Contractors.es on other calendars.



> **NOTE:** Data in user calendars will be displayed according to the options previously set by the administrator in the CRM calendar settings. More about these settings can be read here

Permissions

Each CRM record has a defined access level for other employees regarding the record being created, where:

- **Public:** Anyone can edit, delete, or view the record.
- **Public, read-only:** Anyone can only view, without the ability to edit or delete.
- **Private:** Visible only to the author of the record.

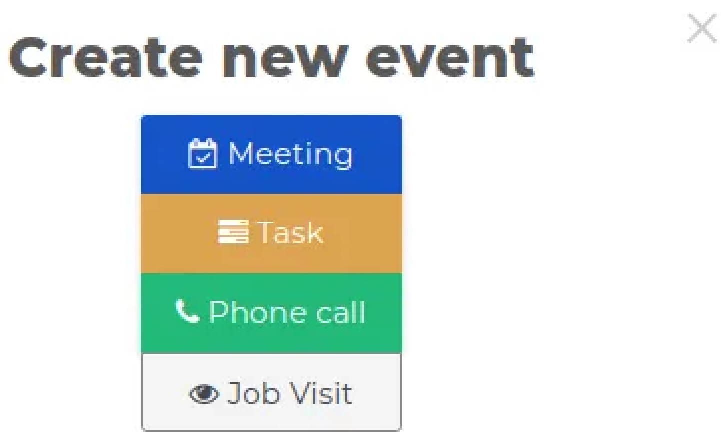
Adding events to the calendar

Creating events in the calendar is simple and intuitive. Users can quickly add new events by specifying the date, time, and additional details such as a description or selected event participants. Removing events from the calendar is just as easy as adding new ones, allowing users to quickly update their schedule. The method of adding events to other users’ calendars, where the number of entries is significant and it is necessary to exclude people who are busy at that time, has been described in detail here.

> **NOTE:** Access to the CRM menu is only available to users who have been granted appropriate roles and permissions in the system by the administrator.

The simplest way to create a new event in the calendar is to follow the sequence below:

1. On the calendar, select the spot where you want to save the new event and click once with the mouse cursor.
2. Choose the type of event from the available options, such as: meeting, task, phone call, or project visit.



3. Fill out the form, paying attention to the appropriate fields depending on the selected type of event.

> **NOTE:** Events have been described [here]/en/crm/2/).

Project visit

- **Project name:** The project selected from the list that the visitation will concern.
- **Visitor:** The person responsible for the conduct of the visitation.

> **NOTE:** If you remove your name from the “Visitor” field, the event will only be visible on the calendar of the selected person from the list. Use the CRM filter to view other people’s events.

- **Status:** A project visitation can have various statuses that inform about its progress or completion.
- **Type of inspection:** Selection of the inspection category.
- **Date of inspection:** The date of the visit to the project.

Removing events from the calendar

To remove an entry from the calendar, follow one of the methods below:

Method I:

1. Click on the “Trash” function button above the calendar. The icon will be marked with a black background.

2. Select the event you want to remove and click again on the place of the card with its name.

3. Confirm its removal on the visible message.

Method II:

1. Click and drag the selected event over the “Trash” button.

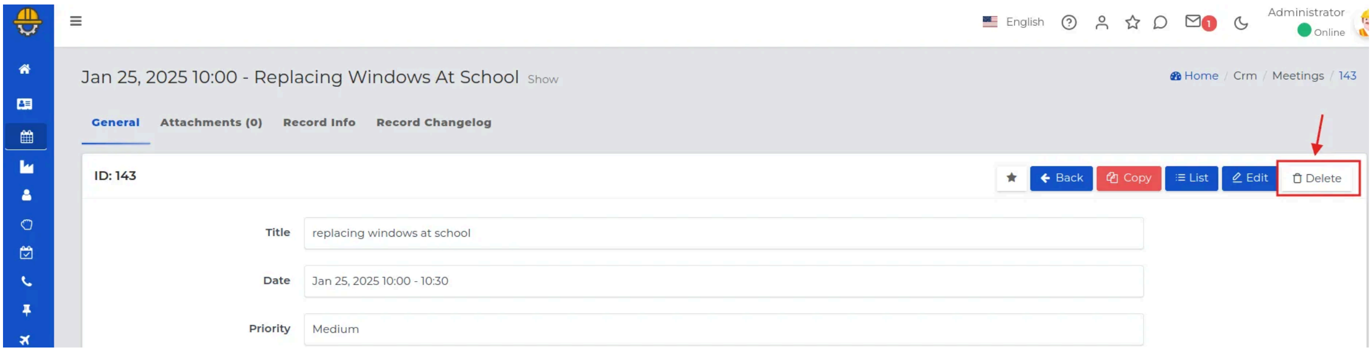
2. Drop it over this button.

3. Confirm its removal.

Method III:

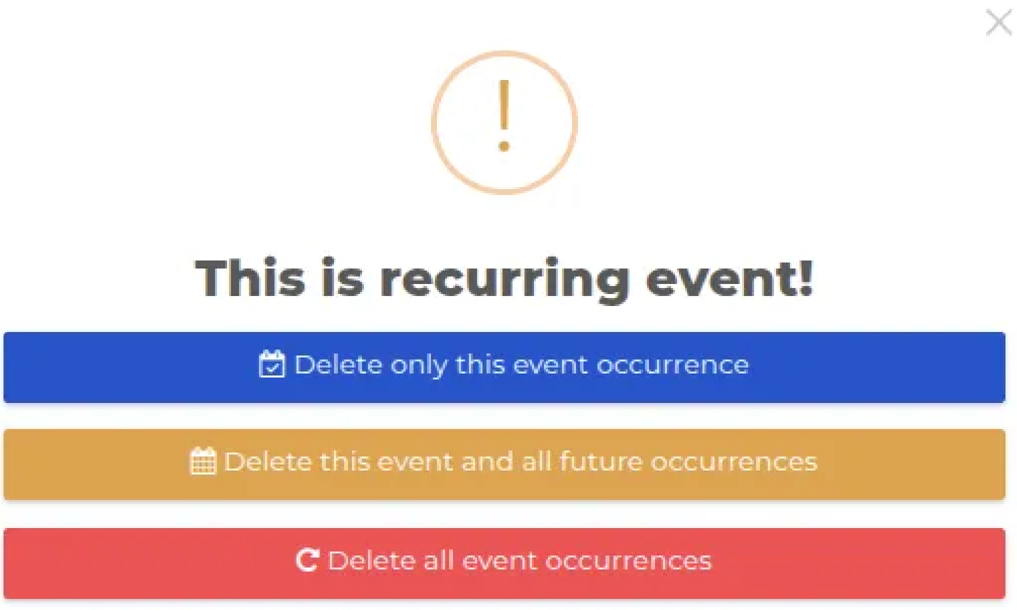
1. Select the entry to be removed on the calendar and click on its name.

2. In the event preview, click the “Remove” button.



3. Confirm its removal on the visible message.

> **NOTE:** For recurring meetings, you have the option to collectively remove entries from the calendar, according to the three available options visible in the screenshot below.



Editing, copying, and moving entries

Editing and copying events on the calendar give users flexibility in adjusting their plans to changing needs without having to create them from scratch. These features facilitate modifying existing events and replicating them with the possibility of introducing changes.

Edit saved events on the calendar in the following way:

1. Click on the card with the event on the calendar that you want to edit.
2. Use the basic button in the record view named “Edit”.
3. Enter the appropriate changes in the form and save it using the “Confirm” button.

To copy an event on the calendar, proceed in the following order:

1. Locate the event you want to copy and go to its preview.
2. Select the “Copy” button.

3. Fill out the form for the new copied event, taking into account any changes you want to introduce.

4. Save by clicking the “Confirm” button.

Moving events on the calendar is done using the “drag and drop” method. This allows for a quick change of the event date without the need to open its edition. To move an entry, follow these steps:

1. Grab the top or bottom edge of the entry you want to move with the cursor.
2. Move it to the appropriate direction (place on the calendar) and release the mouse cursor.

To move an event to a distant location:

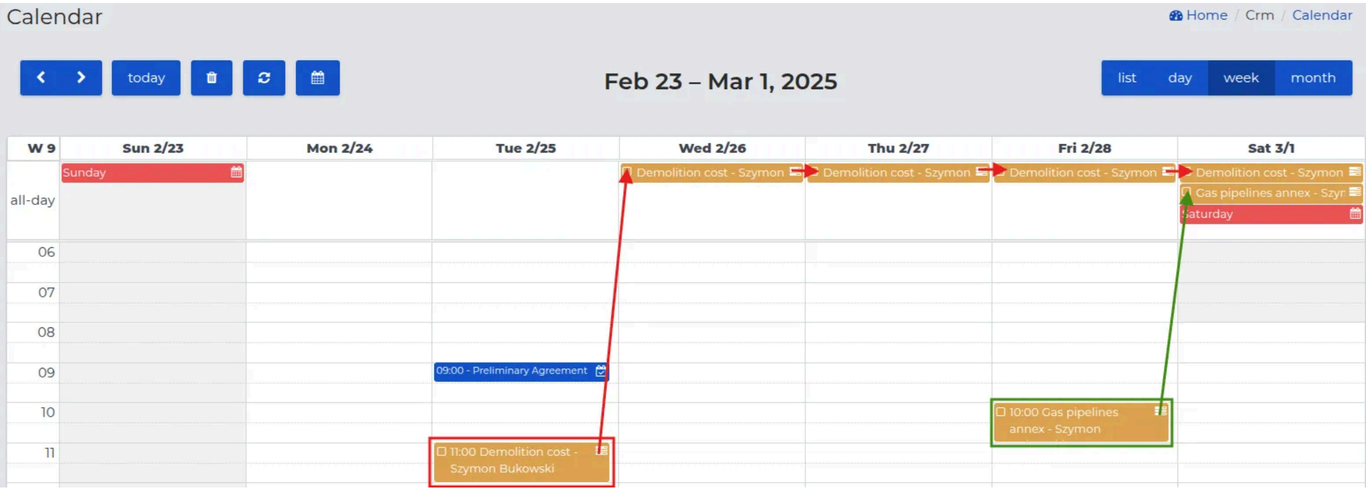
1. Locate the event you want to edit and go to its preview.

2. Select the “Edit” button.

3. Modify the event, taking into account any changes you want to make.

NOTICE: Events with a missed deadline are moved to the next day. If they accumulate over several days, they will be visible for a maximum of 30 calendar days or until they are completed.

Events accumulated from previous days will be visible in the “All Day” row. They will not be arranged in the calendar according to their execution times.

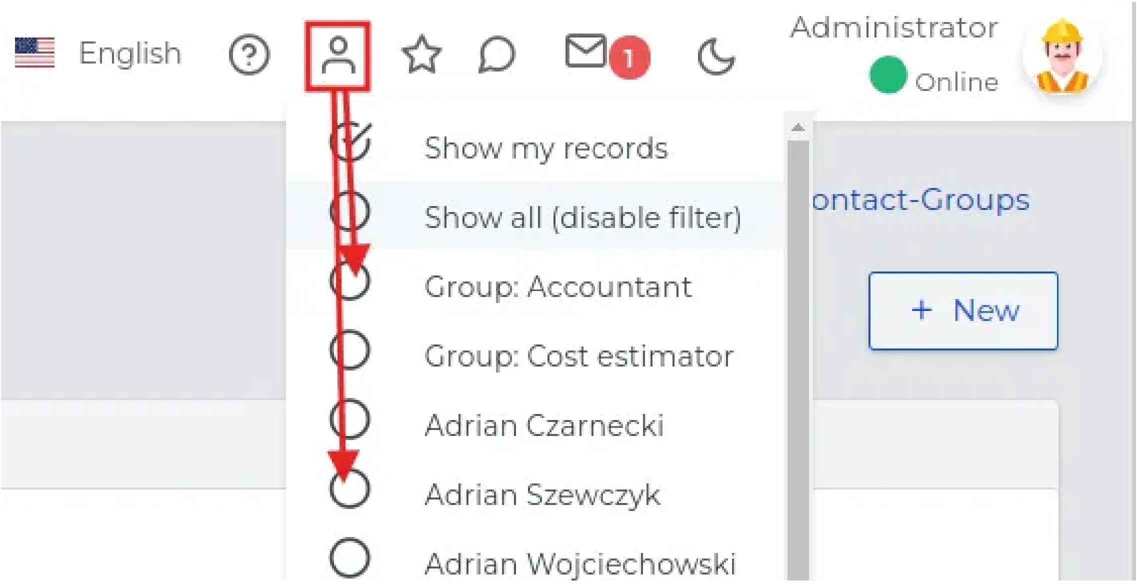


> **REMEMBER:** Employees assigned as substitutes will see the calendar entries of the person they are replacing.

CRM Filter

This type of system feature is useful in planning meetings for one employee as well as for a whole group of employees. After applying the “CRM Filter”, the calendar will reflect entries on the selected calendars and it will be possible to fill gaps or schedule everyone for a certain date.

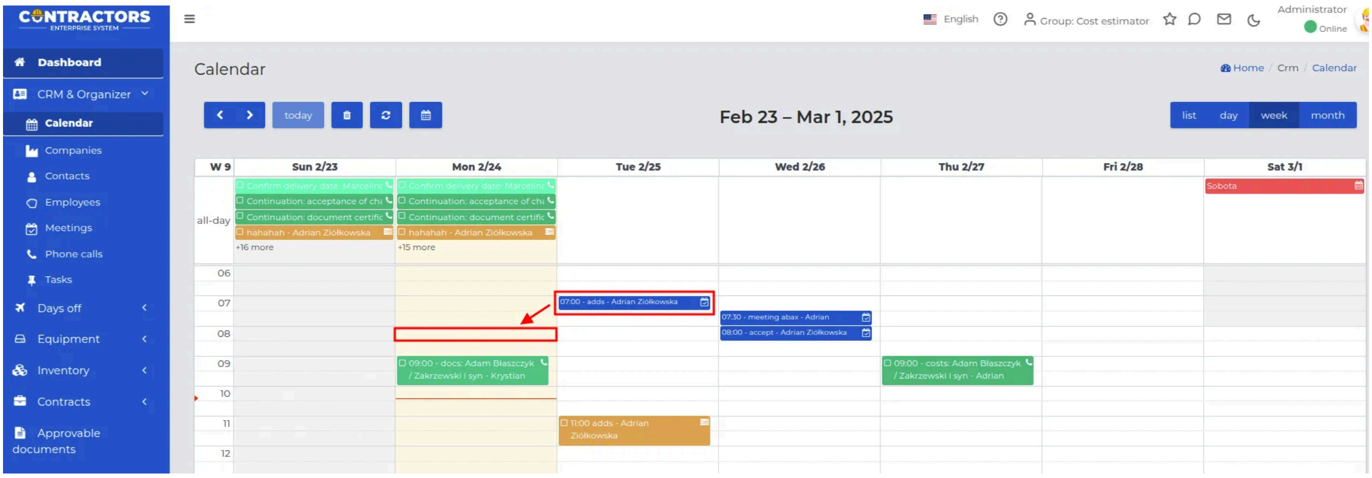
The “CRM Filter” is located in the top panel, where you should select a group of employees or a person for whom the filter will display the calendar from the dropdown list.



Example: Reviewing entries of users belonging to the Cost Estimator group in order to schedule a meeting with a client for one of them.

1. Select the Cost Estimator group from the filter - if it is not there, the administrator must enable its selection in the group settings - details here.

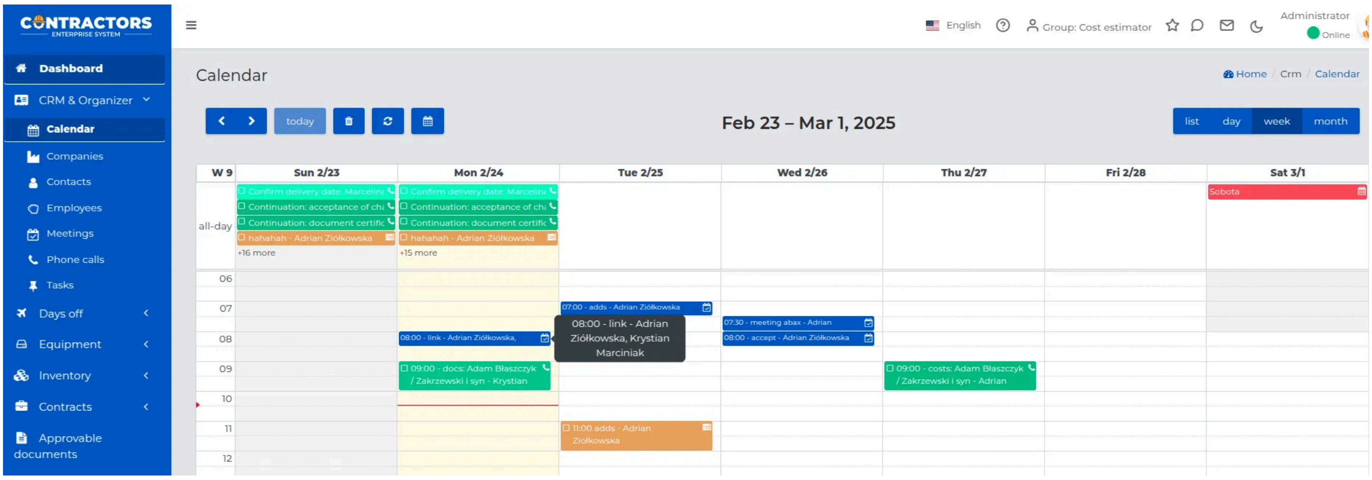
2. Open the menu "CRM -> Calendar" and see which employee does not have a scheduled meeting at a time that suits the potential client, e.g., on Monday at 8:00 AM.



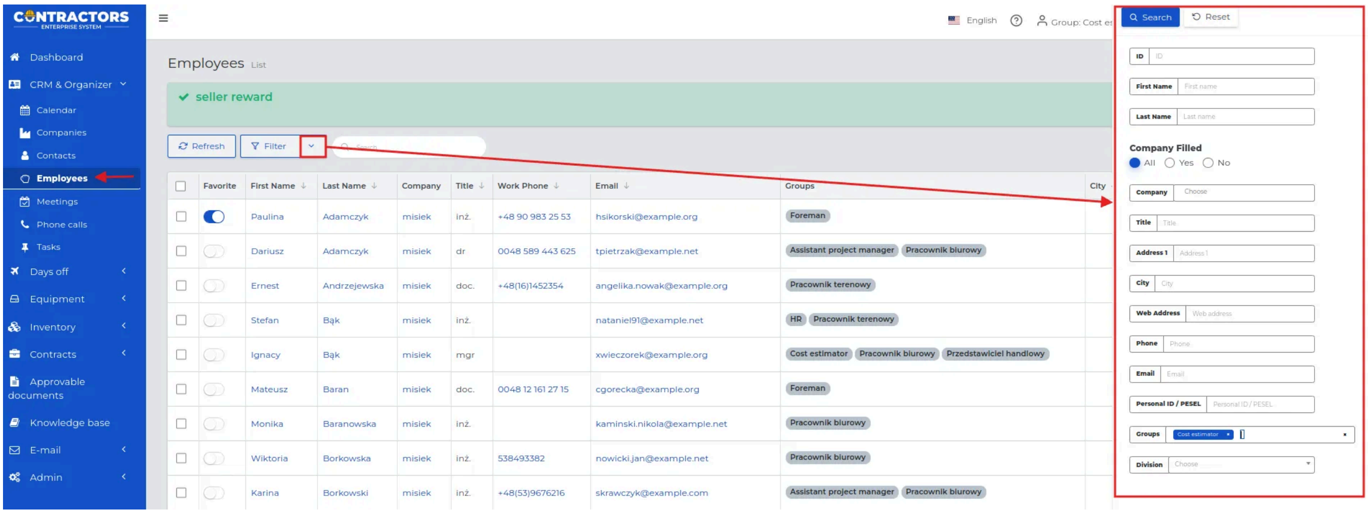
3. Click on the field with the meeting time and create a new event for the selected employee.

4. An entry consistent with the introduced assignment will appear on the employee's calendar.

NOTE: If at the given time in the calendar two employees already have scheduled meetings, hover the cursor over the fields with the entry and check which employees they are.



> **REMEMBER:** Using the detailed filter on the "CRM -> Employees" list, you can check who belongs to the Cost Estimator group.

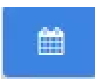


Importing iCalendar (ICS) Calendars

An iCalendar (ICS) file is a format used for exporting and importing calendars. It allows for easy sharing and synchronization of calendar events between different applications and platforms. By exporting calendars to the iCalendar format, users can easily share their schedules with others, integrate them with other time management applications, or transfer them between different devices.

To import a calendar into Contractors.es, follow these steps:

1. Select the "Calendar Settings" icon above the calendar.



2. Pay attention to the fields displayed in the form:

- **Calendars:** Types of events visible on your Contractors.es calendar - we do not edit this at the moment.

- **ICS Calendar Export:** Initially set the types of events you want to export to the ICS format. Only events concerning you will be exported.
    - **Calendar URL:** A special web address that allows transferring events from Contractors.es to another calendar (e.g., Mozilla Thunderbird, Google Calendar, or Office 365).
    - **Reset Calendar URL:** By setting this field to active, the current calendar URL will stop working. You will need to change it to a new one in all your applications or services that use this calendar.
- **ICS Calendar Import:** Paste the URL of the calendar from another application or service that you want to import. Additionally, you can choose the color for these events to be highlighted. They are only visible to you, so each user must add the imported ICS calendars according to their own choice.
    - **Active:** Automatic downloading of data from the imported calendar. Deactivating this field will stop fetching entries visible in external calendars.
    - If you want to import more than one calendar, select the “New” button and make the import settings in the same way.

3. Save the data using the “Submit” button.

Employee Work Organization

In the meetings, phone calls, and tasks section, you will find lists of records that are displayed on the calendar. Using the action buttons, you can preview, change, or delete the selected entry from the list. In the record preview, standard tabs are visible that are available in different types of records where you can use auxiliary buttons, described in more detail here. In each section, you have the option to use different list filtering options, which you can learn more about here.

> **NOTE:** When you enter a contact, you can go to the "Activities" tab, where you can view all records related to that person.

Meetings

The list of records displays entries regarding upcoming meetings.

Using the "New" button located above the list of records, you can add a new meeting.

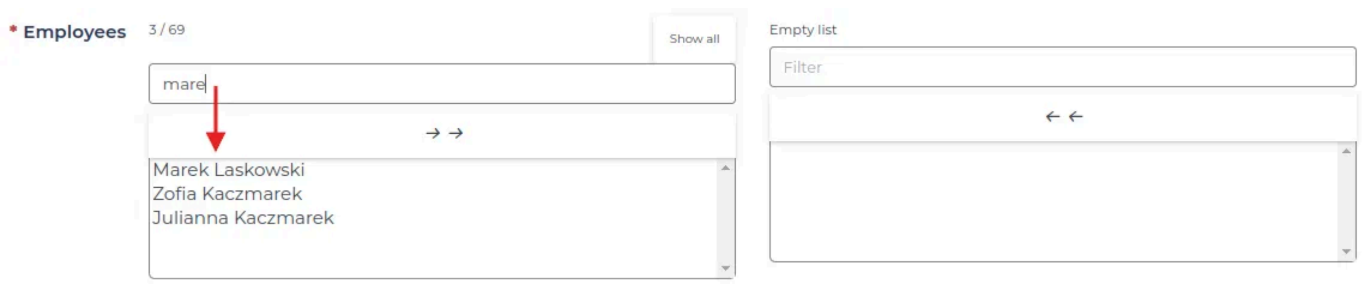
- **Type:** The event can be all-day or with a specified duration.

- **Priority:** How important the meeting is and what priority it has, e.g., low, medium, high.

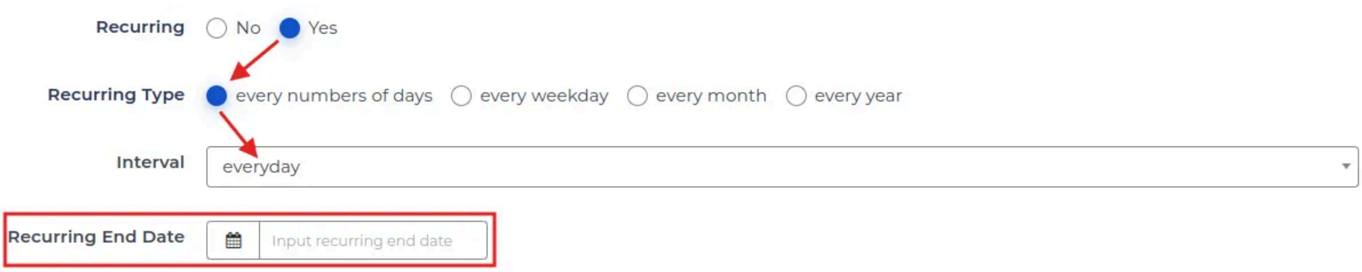
> **REMEMBER:** Setting a priority for a meeting will affect the appearance of the entry in the "CRM -> Meetings" menu list. Meetings with the highest priority will be highlighted in red, medium in light red, and those with low priority will have the standard color (white).

- **Employees:** An optional choice from the list of employees who will be delegated to the meeting.

> **REMEMBER:** To quickly find an employee on the list, enter the next letters of their surname or name in the "Filter" field. The displayed list will be automatically limited to the entered value.



- **Recurring:** Define the time interval and recurrence of entering events, where the time interval is the amount of time between entries, and recurrence determines whether the event is to be repeated and in what scheme.



NOTE: In the case of recurring events, it is possible to specify the end date of their occurrence. Events will be entered into the calendar until the given date. Without entering an end date for the cycle, the system will continue to repeat events indefinitely.

REMEMBER: If the meeting is to involve all employees from the list, use the arrow symbols that allow you to move the entire list in one direction or the other. Clicking on an employee with the cursor will only mark them for participation in the meeting.

- **Permissions:** Access to the calendar entry being created, e.g., public, public read-only, and private. You can find more about permissions [here]/en/crm/1/#uprawnienia).

REMEMBER: Deleted records go to the “Trash,” from where only an **administrator** can restore them to their original place of deletion.

Phones

This section presents a list of uncompleted phone calls.

Using the “New” button located above the list of records, you have the option to add a new phone call.

- **Subject:** The subject of the phone call.

- **Call to:** The entity the phone call concerns.

NOTE: If a contact or company exists in the system and has a contact number entered, it will be immediately visible in the “Contact Number” field.

REMEMBER: In the “Other” field, you can enter values manually without adding the contact/company to the database.

- **Employees:** Optionally select from the list of employees who will be assigned the newly created phone call on the calendar.

- **Priority:** How important the task is and what priority it has, e.g., low, medium, high.

- **Permissions:** Access to the calendar entry being created, e.g., public, public read-only, and private. You can find more about permissions [here]/en/crm/1/#uprawnienia).

> **REMEMBER:** If the phone call is to be conducted by another system user, select them from the list in the “Employees” field.

For the phone call, you can determine its current status by proceeding in the following order:

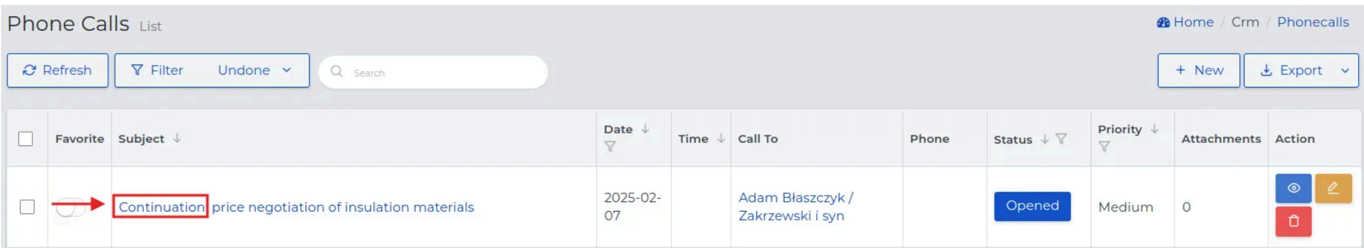
1. Select the record with the phone call in which you want to change the status and click on the name indicating its current state.

2. Complete the form, in which the meaning of the fields is as follows:
    - **New status:** Choose the status from the available options.

- **Create a new event as a continuation:** Determines whether the phone call is to be continued in the future or not.
    - Choosing the option **“No”** - the phone call will not be continued in the future.
    - Choosing the option **“Yes”** - will create a new record in the system, which can be customized as a meeting, task, project visit, or left as a phone call.

3. Save the entered data with the “Confirm” button.

> **NOTE:** When choosing to continue, another form will appear on the screen to be filled out where you can change its title. After saving it, the record will receive the prefix “Continuation” in its name.



> **REMEMBER:** Changing the status to “Closed” or “Cancelled” will stop displaying it on the list of records with active phone calls.

Tasks

In this section of the system, there are entries with unfinished tasks.

Using the “New” button located above the list of records, you have the option to add a new task.

- **Title:** The name of the task.
- **Add deadline**: The date and time of completion.
- **Status:** The task can have various statuses that inform about its progress or completion.
- **Priority:** How important the task is and what priority it has, e.g., low, medium, high.
- **Employees:** Optional selection from the list of employees who will be delegated to the task along with you.

> **REMEMBER:** For the selected employee on the list, the task will be automatically entered into his calendar.

- **Permissions:** Access to the created calendar entry, e.g., public, public read-only, and private. You can find more about permissions [here]/en/crm/1/#uprawnienia).

> **REMEMBER:** In the “Employees” field, add employees from the list by clicking on their names with the cursor if they are to participate in the task being created.

> **NOTE:** To change the status of a task, proceed in the same way as described in the status change section in “Phones”, which is available above.

> **REMEMBER:** Changing the status to “Closed” or “Cancelled” will stop displaying it on the list of records with active tasks.

> **REMEMBER:** Setting a priority for a task will affect the appearance of the entry in the list with records. Tasks with the highest priority will be highlighted in red, medium in light red, and those with low priority will have the standard color (white).

Contact and Company Database

Sections related to the menu item named “Contacts, Companies, and Employees” are places in the system where information about business contacts, companies, and employees is stored. Effective management of relationships with customers, partners, and staff enables efficient actions that translate into smooth business operations.

Company Directory

In the “Companies” section, users have the ability to manage information about business partners, clients, and contractors. Here you can add new company entries, edit existing ones, and possibly delete unnecessary records. Below is the sequence of steps for each of the mentioned possibilities.

Adding a new company to the system follows this scheme:

1. Open the “CRM -> Companies” section in the menu and click the “New” button.

2. Fill out the form, paying attention to the fields:

- **Company name:** The name by which the company can be searched for in the records.

- **Groups:** Assigning the company to one of the groups defining the nature of the business e.g., Supplier, Client, Subcontractor. Groups are defined by the administrator according to the description here.

- **Permissions:** Access to the created “Companies” entry e.g., Public, Public read-only, and Private. You can find more about permissions [here]/en/crm/1/#permissions).

3. Save the data using the “Confirm” button.

Contacts associated with the added company are entered into the system according to the established sequence:

1. Select the company from the list visible in the “CRM -> Companies” menu to which you want to add a contact.

2. Click the “Contacts” tab and select the appropriate contact group e.g., “Contacts”, “Former Contacts”, for which the definition is as follows:

- **Contacts:** Employees currently employed at this company, performing a specific role.

- **Former Contacts:** Data of people who were previously employed at the company. Their data remains in the system, which facilitates further communication or potential cooperation.

3. Add contact details in one of the selected tabs, paying attention to the fields:

- **Title:** The name of the position held, e.g., Accountant, Production Manager.
- **Former employers:** You can optionally select a company where the “Contact” previously worked. However, the company must already exist in your database of companies.
- **Groups:** This pertains to selecting from a list only when the “Contact” belongs to a specific group among the available options. Groups are defined by the administrator as described here.
- **Permissions:** Access to the created “Contact” entry e.g., Public, Public read-only, and Private. You can find more about permissions [here]/en/crm/1/#uprawnienia).

> **NOTE:** If the contact was previously employed at another company that is already in our database, you can select it from the list in the “Former employers” field. The link will also be included in the “Former Contacts” tab for that company.

> **REMEMBER:** When editing or removing an employee from a company, it will automatically be added to former employers. You do not need to manually add such a company.

4. Save the form by clicking the “Confirm” button.

> **NOTE:** If the company in your database operates as an employment agency, you can add a “Contact” to it and mark them as an employee of your company, following the description available here.

Editing company data in the list of records can be done in two ways:

Method I:

1. Select the company from the list whose data you want to edit.
2. Use the “Edit” action button, enter changes, and save using “Confirm”.

Method II:

1. Go to the preview of the selected company's entry in the list using the "View" action button.
2. Click on the "Edit" button, then enter and save the form with changes using "Confirm".

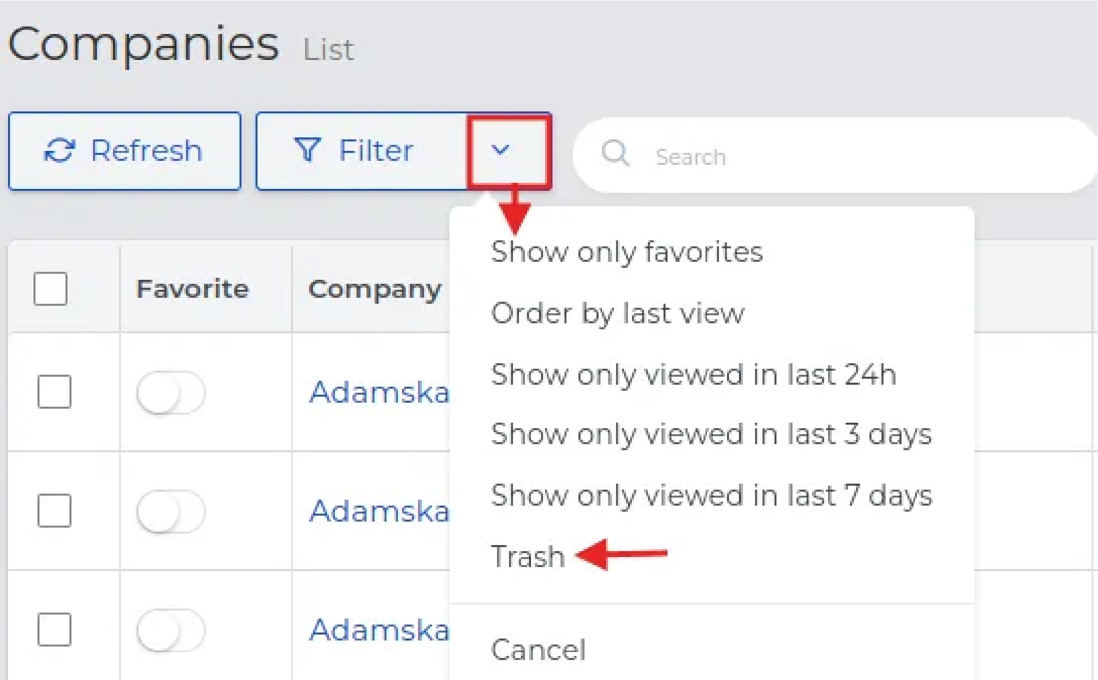
> **REMEMBER:** Clicking the company name on the list is equivalent to using the "View" action button.

Removing a company from the list is only possible when the "Delete" action button is visible in the record, which means there are no links of this company with other important records in the system.

> **NOTE:** Data in records that have been deleted may be available again after being restored from the trash by the System Administrator.

Restoring deleted records is done in the following order:

1. On the list of companies, apply a filter with the option "Trash".



2. Click the "Restore" action button on the record you want to restore.
3. The selected Company will reappear on the list in the "CRM -> Companies" menu.

Contact Directory

The "Contacts" section stores information about people who cooperate with us, are employed, or are not associated with our activity. To add new contacts, assign them to companies, or edit and delete existing records, follow the instructions below.

Adding a new contact to the system is done according to the scheme:

1. Open the “CRM -> Contacts” section in the menu and click the “New” button.

2. Fill out the form, paying attention to the fields:

- **First Name, Last Name:** Personal data by which it will be possible to search for the contact in the records.

- **Groups:** Assigning the contact to one of the groups defining their position, e.g., Estimator, Accountant, Foreman.

- **Permissions:** Access to the created “Contact” entry, e.g., Public, Public read-only, and Private. You can find more about permissions [here]/en/crm/1/#uprawnienia).

3. Save the data using the “Confirm” button.

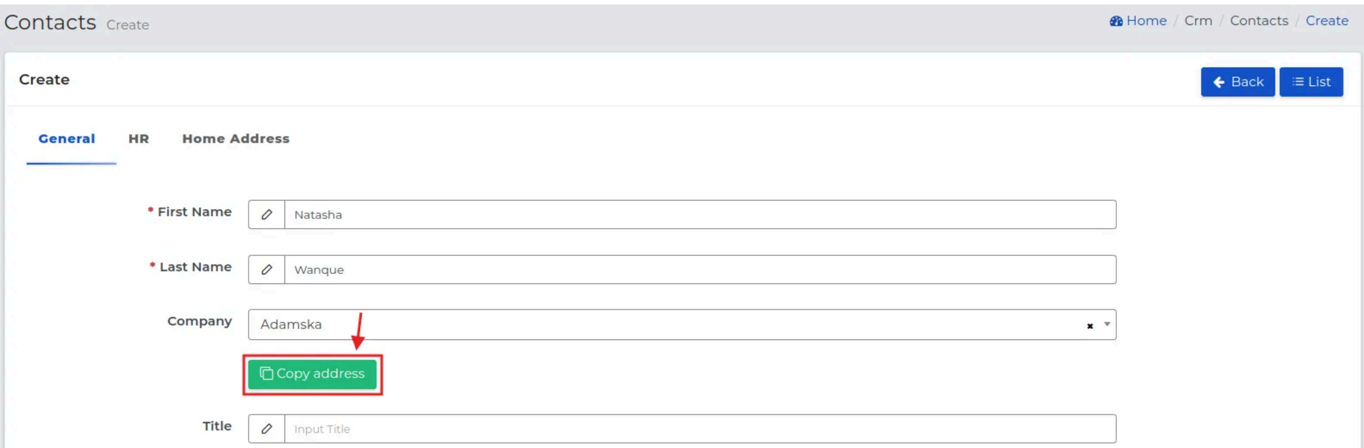
> **NOTE:** The employee adding the Contact can also assign them to the Employees group if they have the appropriate permissions (the “HR” role). For this purpose, use the “HR” tab and enter the employment.

Companies associated with the added Contact are set in the following order:

1. Select the contact from the list visible in the “CRM -> Contacts” menu to which you want to add a company.

2. In the record preview for the “Company” field, select the company name available on the list.

> **NOTE:** Only companies entered into the system will be visible on the list, whose addresses can be copied according to the data provided during the creation of the company record in the system. To do this, use the “Copy address” button after selecting the company you are interested in.



3. Save the form by clicking the “Confirm” button.

Editing contact information on the record list is done in the same way as editing company data.

> **REMEMBER:** Clicking on a contact’s name on the list is equivalent to using the “View” action button.

Deleting a contact from the list is only possible when the “Delete” action button is visible on the record, which means there are no associations with other important records in the system.

> **NOTE:** Data in records that have been deleted are again available in the trash - an administrator can restore such a record to the contact list.

Restoring deleted records with contact information is done in the same way as restoring company data.

Employee Data

The Employees section stores information about individuals who were or are currently employed by the company, even if they do not have an account in the system. Managing the employee database is identical to managing the “Contacts” section.

> **REMEMBER:** An employee is any contact in the database whose status is marked as “Employed” in the “HR” tab.

For contacts with system accounts (created as described [here]), you can assign default substitutes to cover their responsibilities during absences.

Follow these steps to assign a substitute:

1. Go to the “HR” tab, select Edit, and complete the form field:
   - **Default substitutes in case of employee absence:**
     Select an employee from the list who will serve as the substitute during the absence.
2. Save the form by clicking “Confirm”.

> **REMEMBER:** The substitute will be granted access rights to the CRM calendar and projects during the absence. They will take over the responsibilities of the absent employee.

> **NOTE:** Substitutes can only be assigned to employees with the same or higher system permissions.

> **REMEMBER:** Changes made by the substitute will appear in the absent employee’s calendar but will no longer be visible after their absence ends.

> **NOTE:** Access to the employee list is restricted to system users with permissions to view the “Employees” directory.

Frequently Asked Questions

1. **How can I add a new event to the calendar?**

   To add a new event to the calendar, click on the appropriate day in the calendar, then select the type of event from the available options, such as a meeting, task, phone call, or project visit. Next, fill out the form by providing the date, time, and additional details about the event.

2. **Can I copy events in the calendar?**

   Yes, you can copy events in the calendar using the “Copy” button, which is available in the event preview.

3. **Is it possible to move events on the calendar?**

   Yes, you can move events on the calendar using the “drag and drop” method without the need to open their edit. More about moving events on the calendar can be found [here]/en/crm/1/#edycja-kopiowanie-oraz-przesuwanie-wpisów).

4. **How can I delete an event from the calendar?**

   There are three ways to delete entries from the calendar. The first way is to click on the “Trash” button above the calendar, select the event to delete, and then confirm the operation. The second is to drag the event over the trash button and drop it. The third way is to select the entry to delete on the calendar and click the “Delete” button in its preview.

5. **Can I import external calendars into the system?**

   Yes, the system allows for importing external calendars in iCalendar (ICS) format. To do this, use the option visible in the calendar view settings named “Import iCalendar (ICS) calendars” and provide the appropriate URL of the calendar to import.

6. **Is there an option to export the calendar from the system?**

   It is possible to export the Contractors.es calendar to an external application by sharing the calendar URL link, which is located in the “Calendar URL” field of the calendar view settings.

7. **What is the recurrence of events and is it worth using this feature?**

   The recurrence of events defines the time interval and frequency of the event. The time interval is the amount of time between subsequent entries, and the recurrence determines the pattern in which they are to appear on the schedule. The function of entering recurring events can be helpful in many situations. Here are a few examples:

- **Regular meetings or conferences:** If your company organizes regular meetings with clients or internal conferences, you can set the recurrence of these events to avoid the need to manually add them to the calendar each time.

- **Daily tasks:** If routine tasks take a certain amount of time that you need to perform every day or every few days, you can set up a recurring meeting for yourself to regularly remind you about them.

- **Periodic tasks:** Some tasks may only be performed periodically, for example, every few weeks or months. In such cases, the recurrence of event entries can help in planning and organizing these tasks at appropriate intervals.

8. **How do I add a new company to the system?**

   Go to the "CRM -> Companies" section in the menu and click the "New" button. Then fill out the form, the detailed meaning of the fields can be found [here]/en/crm/3/).

9. **How can I identify employees on the "Contacts" list?**

   Simply use the filter option available above the records where you mark "Employees" on the list.

10. **How can I add a note or attach a file to a selected meeting?**

    To add a note or attach a file to a selected meeting, go to the "Attached" tab in the meeting record. Then select the "Notes and files" option and click the "New" button. Fill in and save the displayed form.

11. **How to change the status of a phone call in the system?**

    The quickest way to change the status of a phone call is to click on the name of the current status. The system will redirect the user to a form where changes must be made and saved.

12. **How to add several employees from the list to one meeting?**

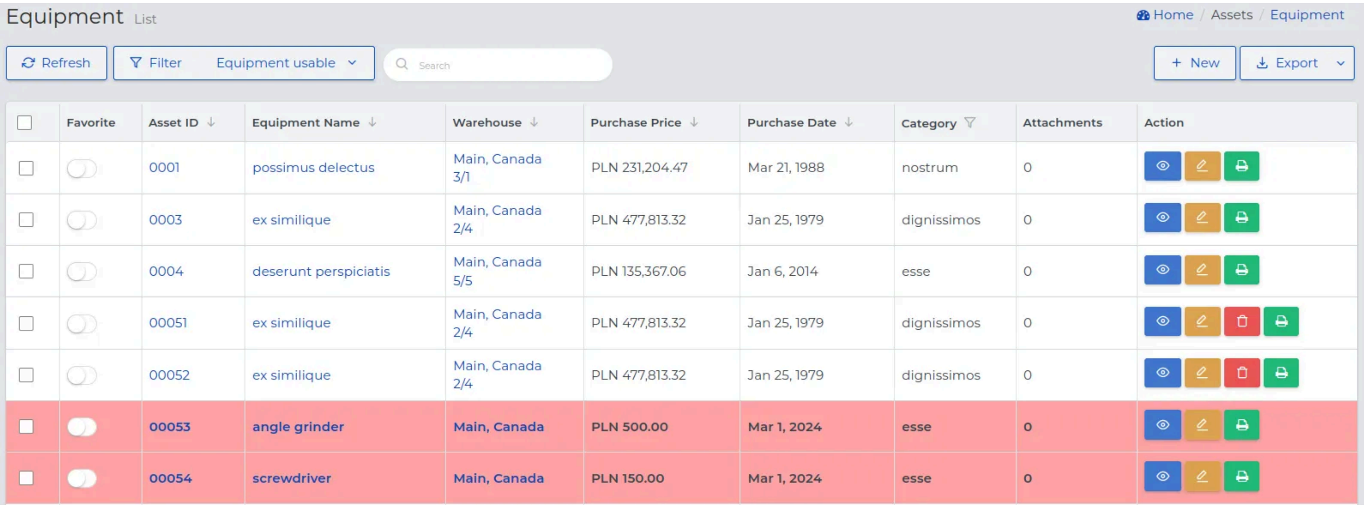
    When creating a meeting record, in the field named "Employees" click the cursor successively on the selected people. They will be moved to the right side of the table which means that after saving the form they will receive an entry about the meeting in their calendar.

13. **What is the purpose of event continuation and how to use it?**

    The continuation of a telephone conversation is a good example illustrating how a conversation is to be continued after some time (e.g., familiarizing oneself with an offer) or may be transferred to another person with whom it will have to be conducted (e.g., this applies to situations when the selected contact is not sufficiently decisive and negotiations have to be conducted, for example, with a supervisor).

Equipment

In the **“Equipment -> List”** section, you can find information regarding the storage location of the equipment, the date, and the amount of its purchase (the amount is only visible for roles specified in the permissions).



	Favorite	Asset ID	Equipment Name	Warehouse	Purchase Price	Purchase Date	Category	Attachments	Action
		0001	possimus delectus	Main, Canada 3/1	PLN 231,204.47	Mar 21, 1988	nostrum	0	
		0003	ex similique	Main, Canada 2/4	PLN 477,813.32	Jan 25, 1979	dignissimos	0	
		0004	deserunt perspiciatis	Main, Canada 5/5	PLN 135,367.06	Jan 6, 2014	esse	0	
		00051	ex similique	Main, Canada 2/4	PLN 477,813.32	Jan 25, 1979	dignissimos	0	
		00052	ex similique	Main, Canada 2/4	PLN 477,813.32	Jan 25, 1979	dignissimos	0	
		00053	angle grinder	Main, Canada	PLN 500.00	Mar 1, 2024	esse	0	
		00054	screwdriver	Main, Canada	PLN 150.00	Mar 1, 2024	esse	0	

> **REMEMBER:** If the service interval is exceeded, the equipment will be marked in red on the list of records, signaling the need to send it for service.

Using the action buttons, you can view, edit, or delete selected entries from the list. In the record preview, standard tabs available in different types of records are visible, where you can use auxiliary buttons. In each section, there is the possibility to filter the list, and detailed information on this can be found [here](#).

Adding equipment and hardware

You can import equipment and hardware into the system by preparing the appropriate data file as described [here](#), or add it to the list manually in the following order:

1. Go to the “Equipment -> List” section and click the “New” button.

2. Fill out the form, for which the meaning of the fields is as follows:

    - **Generate equipment identifier:** The method of identifying equipment in the system.

        - Choosing the option **“No”** - will allow you to enter your own equipment identification name in the “Equipment Identifier” field.

        - Choosing the option **“Yes”** - generates a unique sequence of digits assigned in order, according to the addition of subsequent items to the list.

  - **Equipment name:** The name of the equipment being added.
  - **Serial number:** The unique serial number of the equipment provided by the manufacturer.
  - **Warehouse:** The place where the equipment is located when not loaned out, for example, "Main Warehouse".
  - **Location in warehouse:** The specific location of the equipment in the warehouse, e.g., shelf, aisle, etc.
  - **Purchase amount:** The price at which the equipment was purchased.
  - **Date of purchase:** The date the equipment was purchased.
  - **Supplier:** The company or person from whom the equipment was purchased.

ATTENTION: Only a company belonging to the "Supplier" group can be a supplier. Make sure such a company exists in the system and add it if it has not yet been entered.

- **Invoice number:** The number of the document confirming the purchase of equipment.
- **Category:** Choose the appropriate category that defines the type of equipment.
- **Service based on meter readings:** A method of determining the timing of maintenance or service based on the equipment usage meter.
  - Choosing the option **"No"** - the equipment does not require this type of service.
  - Choosing the option **"Yes"** - mark if the equipment requires service, dependent on the service interval e.g., the number of kilometers on the meter.
- **Service based on time:** A method of determining the timing of service based on time intervals.
  - Choosing the option **"No"** - the equipment does not require this type of service.
  - Choosing the option **"Yes"** - mark if the equipment requires service, dependent on the time interval, e.g., once a year, once a month, etc.
- **Meter reading at the time of purchase:** Provide the initial meter reading of the equipment, from which its usage will be counted.
- > **Note:** Optional addition of notes or additional description regarding the equipment.
- **Status:** Determine the current state of the equipment from the available: usable, lost, damaged.

3. Save the data using the "Confirm" button.

> **REMEMBER:** After adding equipment to the system, you can print the device label by clicking the “Print Device Label” action button in the record. Stick the printed label on the device to easily issue or receive equipment. This way, you also gain the ability to identify the equipment.

ATTENTION: Records visible on the list that are marked in red indicate the need to send the equipment for service. This necessity arises from the fact that since the last service, the number of usage units has exceeded the specified service interval. The following message appears in the record preview:

Hardware Requirements

Requests for hardware can include both equipment stored in inventory and that which needs to be purchased or rented from an external company.

You can add a request for the necessary equipment or hardware to the system in the following order:

1. Go to the “Equipment -> Requirements” menu and select the “New” button.

2. Fill out the form, the meaning of the fields is as follows:

- **Name:** The name that best describes the required equipment, e.g., red 100l drum concrete mixer or Makita grinder.

> **REMEMBER:** The name of the equipment does not have to be identical to the items found in the company’s inventory. You can enter it freely.

- **Equipment needed from the day:** Specify the deadline by which the hardware request should be fulfilled.

- **Assign:** Assess whether a link should be created in the system for the reported hardware requirement.

    - Choosing the option **“No”** - no links with other system records.

    - Choosing the option “**Yes”** - means that the request concerns equipment needed for a specific project or client, which should be specified on the list.

- **Estimated return date:** The planned date for returning the equipment to the warehouse.

- **Reported by employee:** Data of the employee reporting the requirement.

> **NOTE:** You can only select contacts of persons who are currently employed workers.

3. Save the entered data using the “Confirm” button.

NOTE: Records highlighted in red indicate requests whose deadline for fulfillment has been exceeded and are still waiting for the requirement to be met.

REMEMBER: A construction worker has the ability to report a requirement through the mobile application. In this case, they only enter what equipment they are interested in and when they need it - the rest of the data is filled in automatically.

Issuing Equipment Based on Requests

The process of issuing equipment based on reported requirements proceeds as follows:

1. Go to the records with requests in the "Equipment -> Requirements" menu.

2. Adjust the list of requests by applying the appropriate type of filtering of entries, which you can read more about here.

3. At the selected record, in the "Equipment Rentals" column, click on "Equipment Demand - Device Issue".

REMEMBER: Equipment that has been purchased according to the reported demand must first be entered into the equipment list. Only then will it be possible to assign it to a specific loan application.

4. Fill out the form, the meaning of the fields is as follows:

- **Name:** The name of the equipment provided by the employee submitting the demand. This field is not editable and indicates the type of submission.

- **Rental from an external company:** Determine whether the required equipment is available in the equipment warehouse, or if it needs to be rented.

    - Choosing the option **"No"** - there is no need.

    - Choosing the option **"Yes"** - the equipment should be rented from an external company, where the next fields to be filled in will concern:

- **Identification of the device from the rental company:** Assignment of a characteristic symbol, number, or own name for the identification of this device.

- **Description of the device from the rental company:** Additional description regarding the condition of the equipment or its features.

- **Renting company:** Selection from the list of a record belonging to the "Supplier" group.

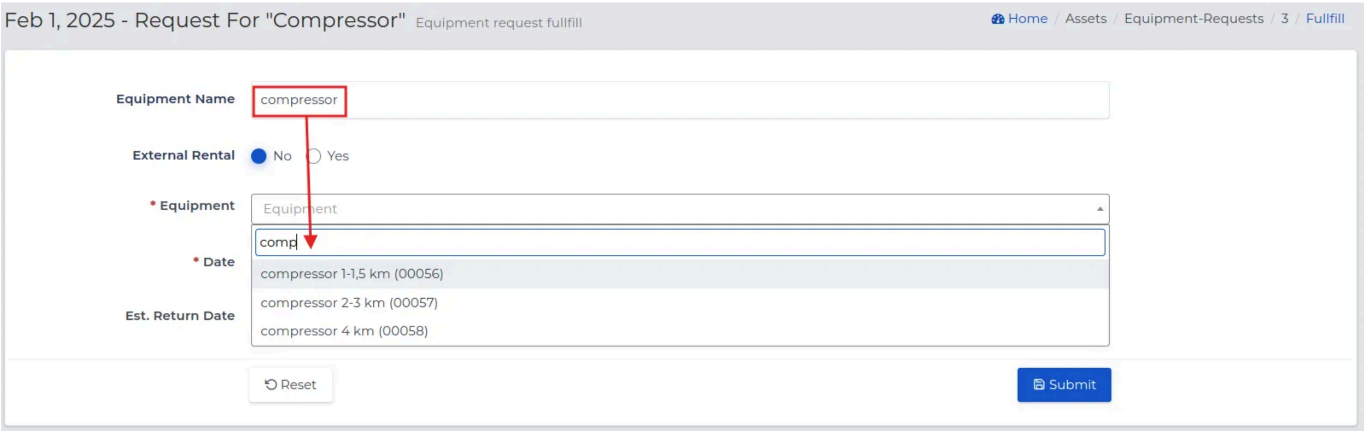
- **Cost of renting the device:** The amount that must be paid for renting the device, according to the established billing period. This amount will be settled in the financial balance of the project on which the equipment will be used.

- **Billing period for the rental cost:** The method of charging for the rental of the equipment, e.g., one-time, daily, weekly, or monthly.

The rest of the form will be identical regardless of whether the equipment is rented from an external company or is available in our warehouse.

- **Equipment:** Select the name from the equipment list that corresponds to the characteristics of the equipment provided by the employee.

> **NOTE:** Only those items that are not currently rented out will be visible on the list of available equipment.



> **REMEMBER:** If an employee is interested in specific equipment, check its return date on the "Rental Register" list and inform the employee when it could be available for rental.

- **Date:** Specifies the date when the equipment will be needed by the employee submitting the request.

- **Estimated return date:** The declared date for returning the equipment to the equipment warehouse.

5. Save the data using the "Confirm" button.

> **REMEMBER:** The consequence of fulfilling an equipment request is its rental. The completed application will be visible simultaneously in both system sections: "Requests" and "Rental Register".

Equipment Rental

The system functions related to renting and returning equipment are designed to ensure the efficient circulation of equipment and to optimize the use of available resources.

> **REMEMBER:** Every rented piece of equipment must be properly registered in the system, specifying the return date and the person responsible for its return.

To register the rental of equipment, follow these steps:

1. Go to the menu “Equipment -> Rental Register” and click the “New” button.

   The form for creating equipment rental will be partially identical to the form concerning the issuance of equipment based on a reported request. The remaining fields will concern:

- **Used by:** Assign from the list the selected employee or subcontractor who is renting the equipment.

> **REMEMBER:** If the person renting the equipment does not belong to any of these groups, enter their details in the field “Other -> Who is responsible”.

- **Assign:** Choose the purpose of the equipment rental.
    - Selecting the option **“No”** - the rental is not associated with a client or project entered into the system.
    - Selecting the option **“Yes”** - specify the association with a client or project that the rental will concern.
- **Estimated return date:** The declared date for returning the equipment.
- **Return date**: Leave the field blank until the actual return of the equipment by the renting person.

2. Save the form using the “Confirm” button.

> **NOTE:** You can only rent equipment that is not currently rented out or in service.

> **REMEMBER:** To check the location of a specific type of equipment, review all records in the “Equipment Rental” section. Use the list sorting function or enter the name of the equipment in the “Search” field.

Simultaneous Rental of Multiple Equipment

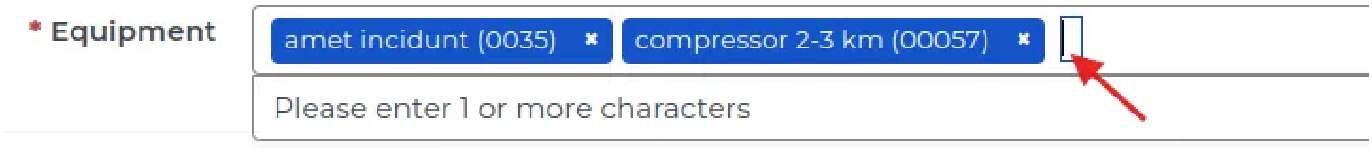
The system allows for the rental of several pieces of equipment at the same time. This way, for a single employee or subcontractor, we can assign more than one rented device at a time.

To rent several pieces of equipment simultaneously, follow the scheme:

1. Above the list of records in the “Equipment -> Rental Register” section, select the “Bulk internal rental” button.

2. Fill out the rental creation form.

3. For the “Equipment” field, sequentially select the names of the equipment from the list that are to pertain to this rental.



4. Save the form using the “Confirm” button.

> **REMEMBER:** When creating a collective rental of equipment, each selected piece of equipment will be registered as a separate record in the rental register. This will make it possible to submit individual requests concerning the postponement of the return or the collection of specific devices.

Return of Equipment

A report informing about the return of equipment to the equipment warehouse should be submitted each time an employee returns equipment. This will ensure that the data on available equipment in the system is always up to date.

The system allows for the registration of equipment return in two ways:

Method I: Return of equipment from the equipment list.

1. Find the equipment to be returned among the records in the “Equipment -> List” menu.

2. Go to the view of its entry by clicking on the name of the equipment or the order identifier.

3. Select the “Rentals” tab and in the “Return Date” column click on “Return”.

4. Fill out the form, the meaning of whose fields pertains to:

- **Return Date**: The date of the equipment return.

- **Usage Counter Indicates**: The method of recording the counter state, where:

    - Choosing the option **“whole”** - specifies the full state of the counter.

    - Choosing the option **“part”** - is the value corresponding to the difference between the counter state on the return date and the counter state on the rental date.

- **Usage Counter**: The value of the usage counter, given in accordance with the selected setting.

- **Device returned in the same condition**: Assessment of the actual condition compared to the state of the equipment on the day of its rental.

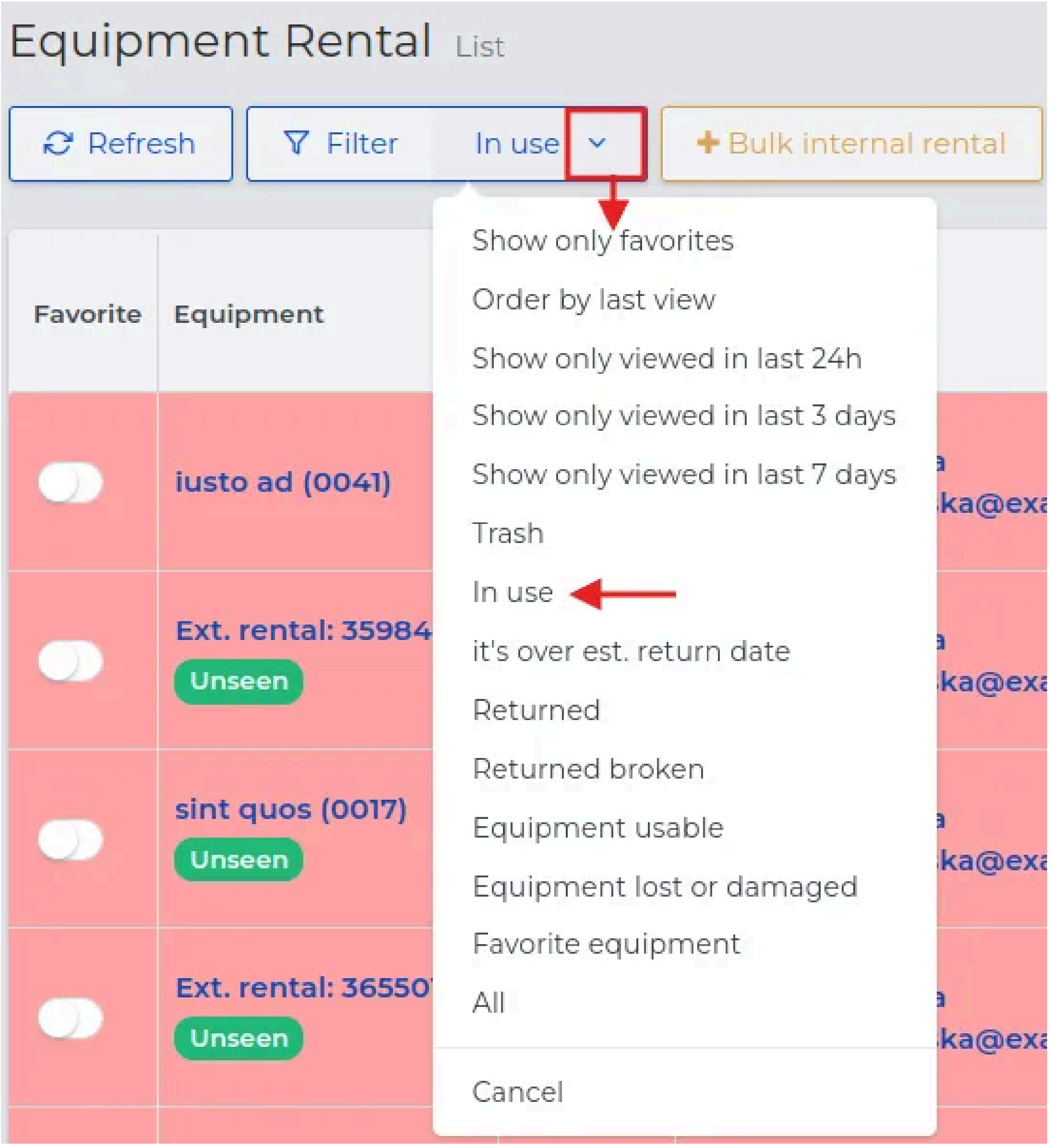
- Selecting the option **"No"** - for damaged equipment, specify what has been damaged and optionally attach photos of the damage in the "Damage Photos" field.
- Selecting the option **"Yes"** - the equipment has not been damaged.

- **Note**: Additional information or comments regarding the returned equipment.

4. Save the data using the "Confirm" button.

Method II: Returning equipment from the rental register list.

1. On the list available in the menu "Equipment -> Rental Register", leave only the records specifying equipment "In use".



2. Return the selected equipment by clicking on the word "Return" in the "Return Date" column.

3. Fill out the form and save it with the "Confirm" button.

Postponement of the return of rented equipment

If it is necessary to change the return date of the rented equipment, the system allows you to add a new date and register this change in the database.

The method of reporting the postponement of the return, you will perform in the following order:

1. Go to the menu “Equipment -> Return Postponements” and click on the “New” button.

2. Fill out the form, the meaning of the fields is as follows:

- **Equipment rental:** Find the equipment on the list whose return date you want to change.

- **New planned return date:** Specify the new return date for the equipment.

3. Save the data using the “Confirm” button.

> **REMEMBER:** Only after the application is approved by a person with the appropriate permissions in the system, and its status is changed to “Approved”, will you be able to return the equipment on the declared date.

> **NOTE:** Lack of consent to postpone the return of the equipment means that the equipment must be returned immediately after exceeding the established deadline.

> **NOTE:** A construction worker can create a request for postponement of the return and control the rented equipment through the mobile application.

Acceptance or rejection of the application with a change of return date

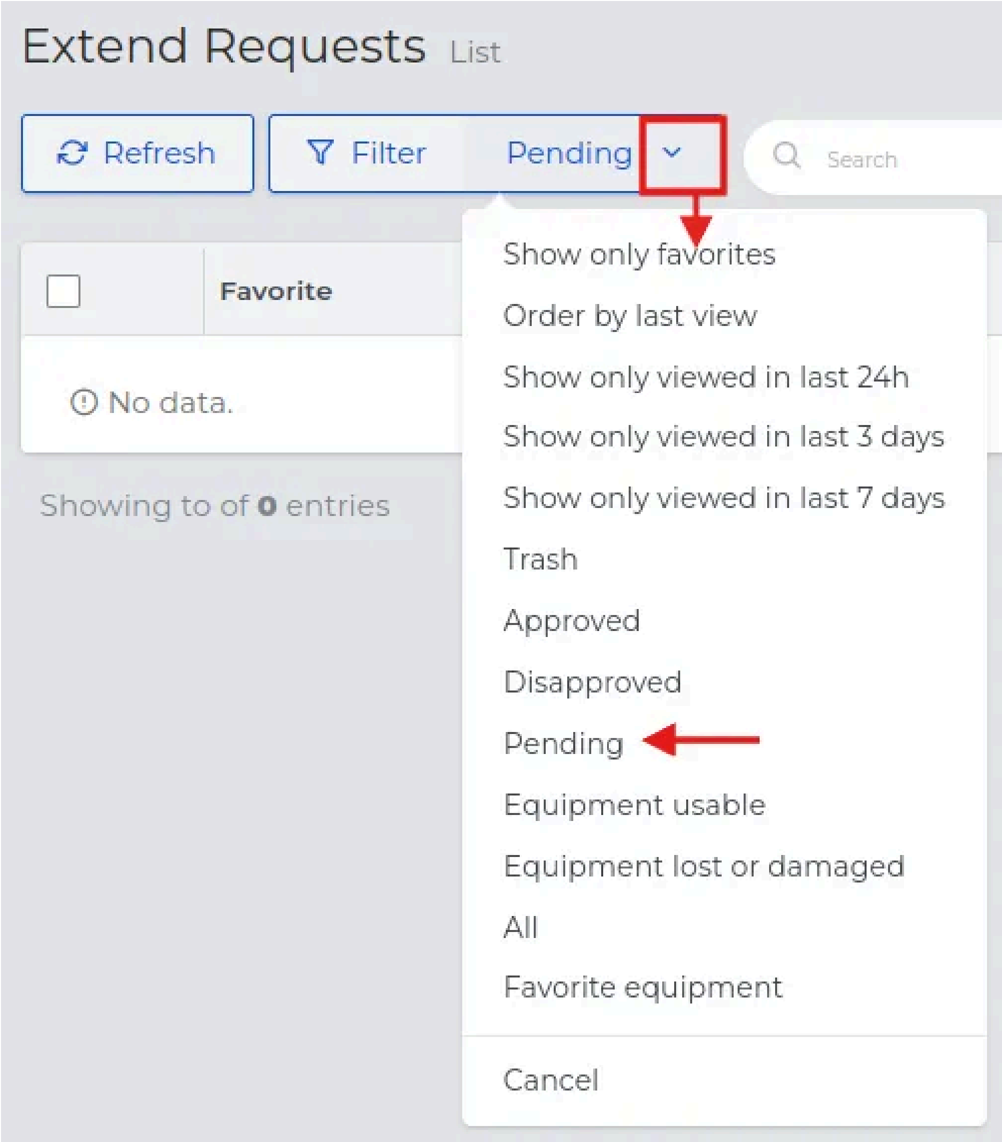
Any deferral of return can only occur after acceptance of the reported issue on the list.

> **NOTE:** Only users with appropriate permissions can change the statuses in requests for deferral of equipment return.

Changing the status of requests for deferral of return proceeds according to the following scheme:

1. Open the list “Equipment -> Extend requests” and apply the “Pending” filter.

2. In the “Status” column, click on the status name.



3. On the displayed form, determine the new status, making a choice among the available options: “Approved” or “Disagreed”.

4. Optionally, in the “Note” field, enter the justification for your choice.

5. Save the form using the “Confirm” button.

> **NOTE:** Returning equipment before the planned date for which the “Extend request” was applied will not allow for further change of its status. The change in the color of the status name from blue to black indicates the situation.

Equipment Collection

The equipment collection register gathers information about reports in which it is necessary for the company to collect the equipment due to the inability to return it independently, e.g., due to the lack of appropriate transport. The system allows for adding an equipment collection order and marking by whom and when it was delivered to the warehouse.

> **NOTE:** The fields in the equipment collection order creation form are identical to those in the case of creating orders for equipment extend requests.

> **NOTE:** A construction worker can create a collection request record through the mobile app.

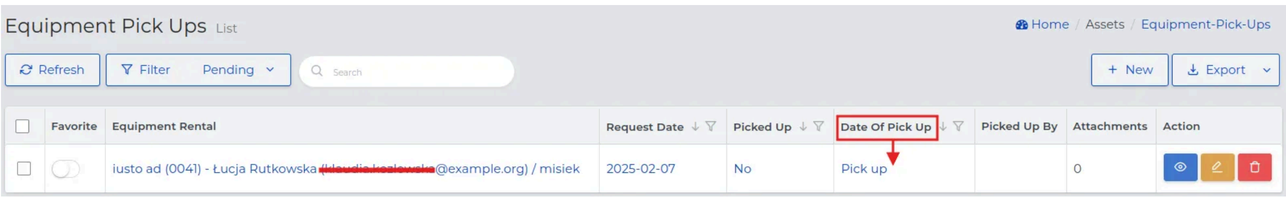
> **REMEMBER:** The final stage determining the equipment collection is its delivery to the warehouse by the employee.

Equipment collection orders can be verified in two ways:

Method I: The employee collects and immediately brings the equipment to the warehouse.

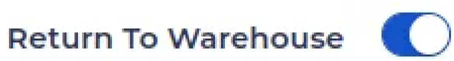
1. On the list “Equipment -> Collection” apply the “Pending” filter and select the name of the equipment that the employee is to bring.

2. In the “Collection Date” column, click on “Pick up”.



> **NOTE:** Selecting “No” in the “Received” column will redirect you to the same form you are currently in.

3. Fill in the fields in the form regarding the selection from the list of the employee who is to receive the goods and mark the “Active slider” named “Return to warehouse”.



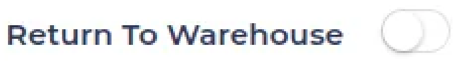
4. Save the data using the “Confirm” button.

5. The received goods are available on the equipment list. Employees can reserve it by reporting their needs.

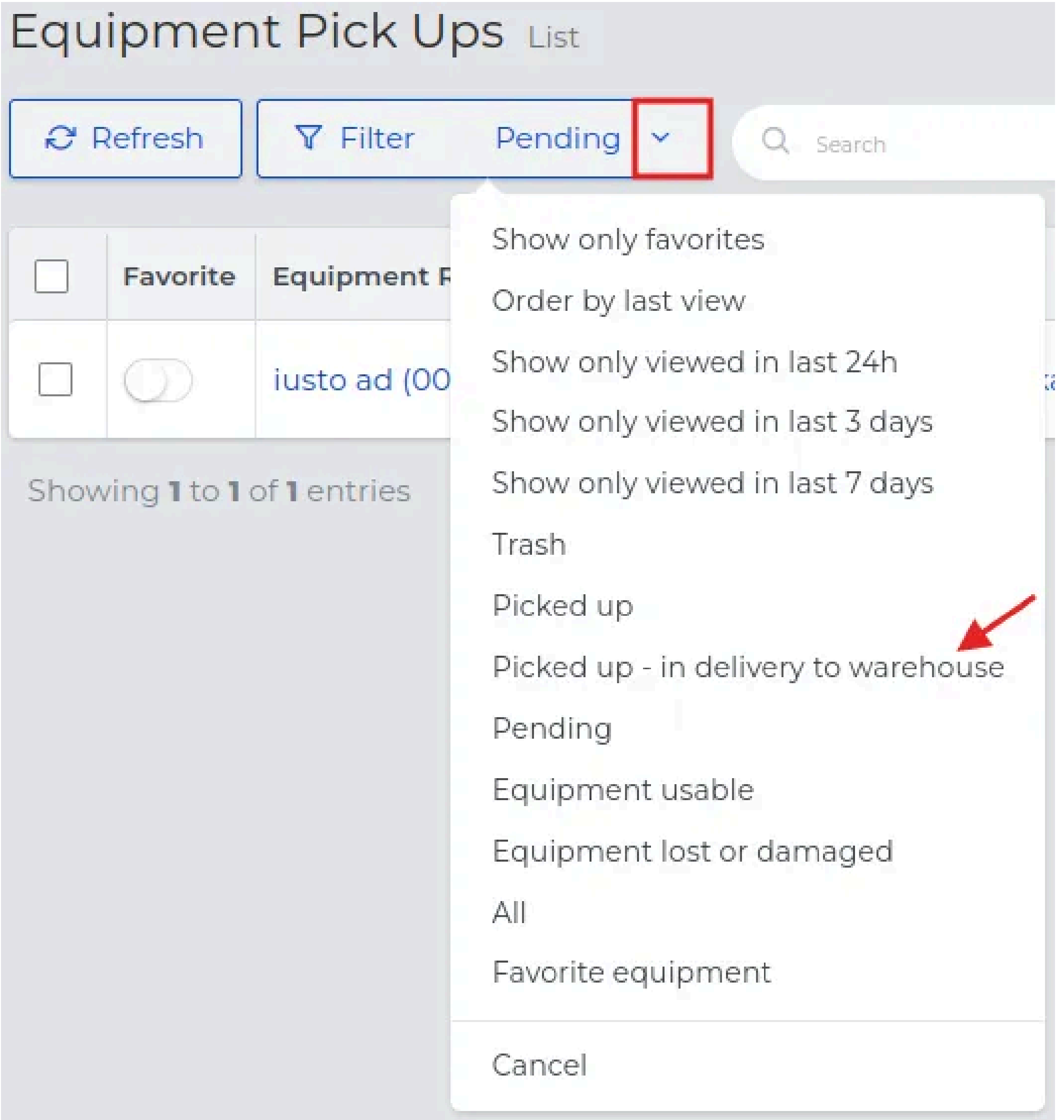
Method II: The employee has received but has not yet delivered the equipment to the warehouse.

> **NOTE:** This method of creating equipment receipt applies only to requests made on a desktop computer.

1. Follow the scheme described in **Method I**, only leave the slider named “Return to warehouse” inactive.

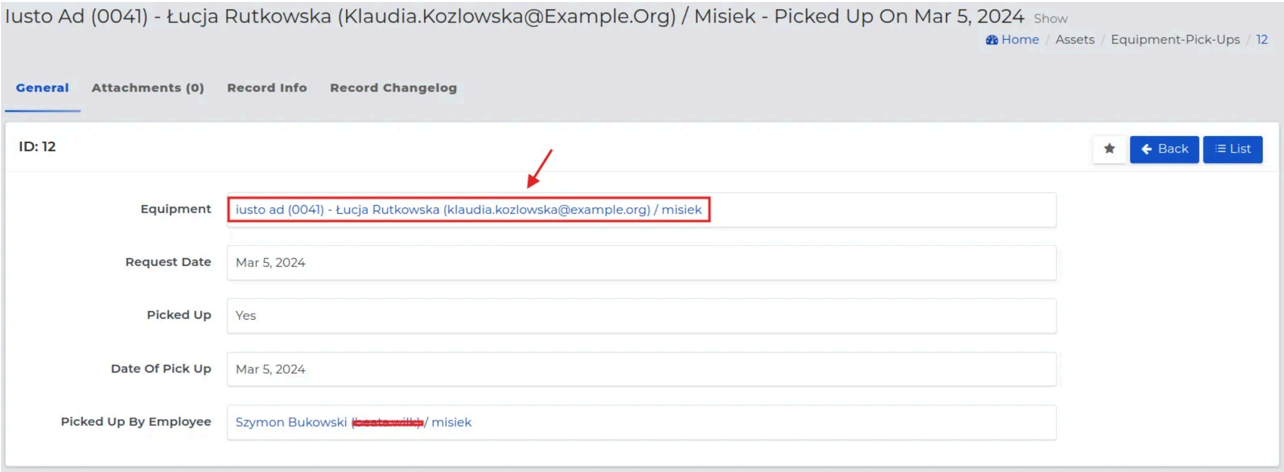


2. Apply a filter on the “Equipment -> Receipt” list, selecting the “Picked up - in delivery to warehouse” option.

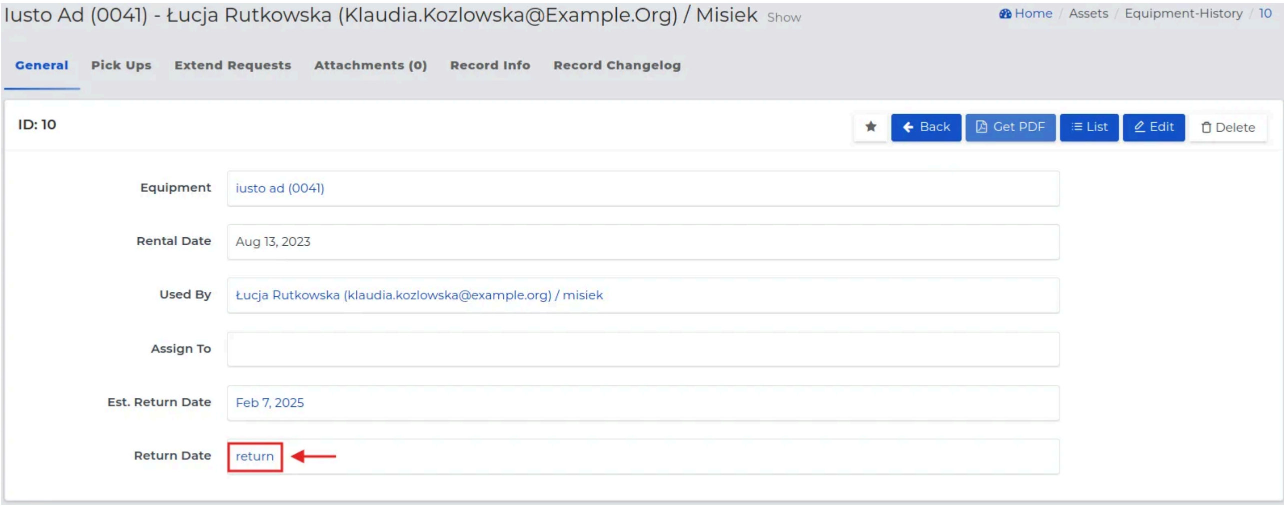


3. Once the equipment is delivered by the driver, find this equipment on the displayed list and click on its name.

4. In the displayed preview, select the equipment name again.



5. Then click on the word "Return" in the "Date of return" field.



6. Fill in the form and save the changes with the "Confirm" button.

Receipt of equipment using barcode labels

In response to innovative technologies, the Contractors.es system allows for the registration of equipment receipt with the help of barcode labels. As a result, the procedure itself is quick, and returns are automatically registered in the system.

> **NOTE:** Equipment and devices can be labeled with barcodes generated by the system, which can be downloaded and printed from the system.

> **REMEMBER:** To use the barcode scanning function, you must be logged into the system on a mobile device such as a phone or tablet and have the appropriate barcode scanning software installed.

Receiving rented equipment marked with a barcode is done according to the description below:

1. Log in to the Contractors.es system on a mobile device and select "Equipment -> Rental Register" from the menu.

2. Click on the "Scan barcode" function button.

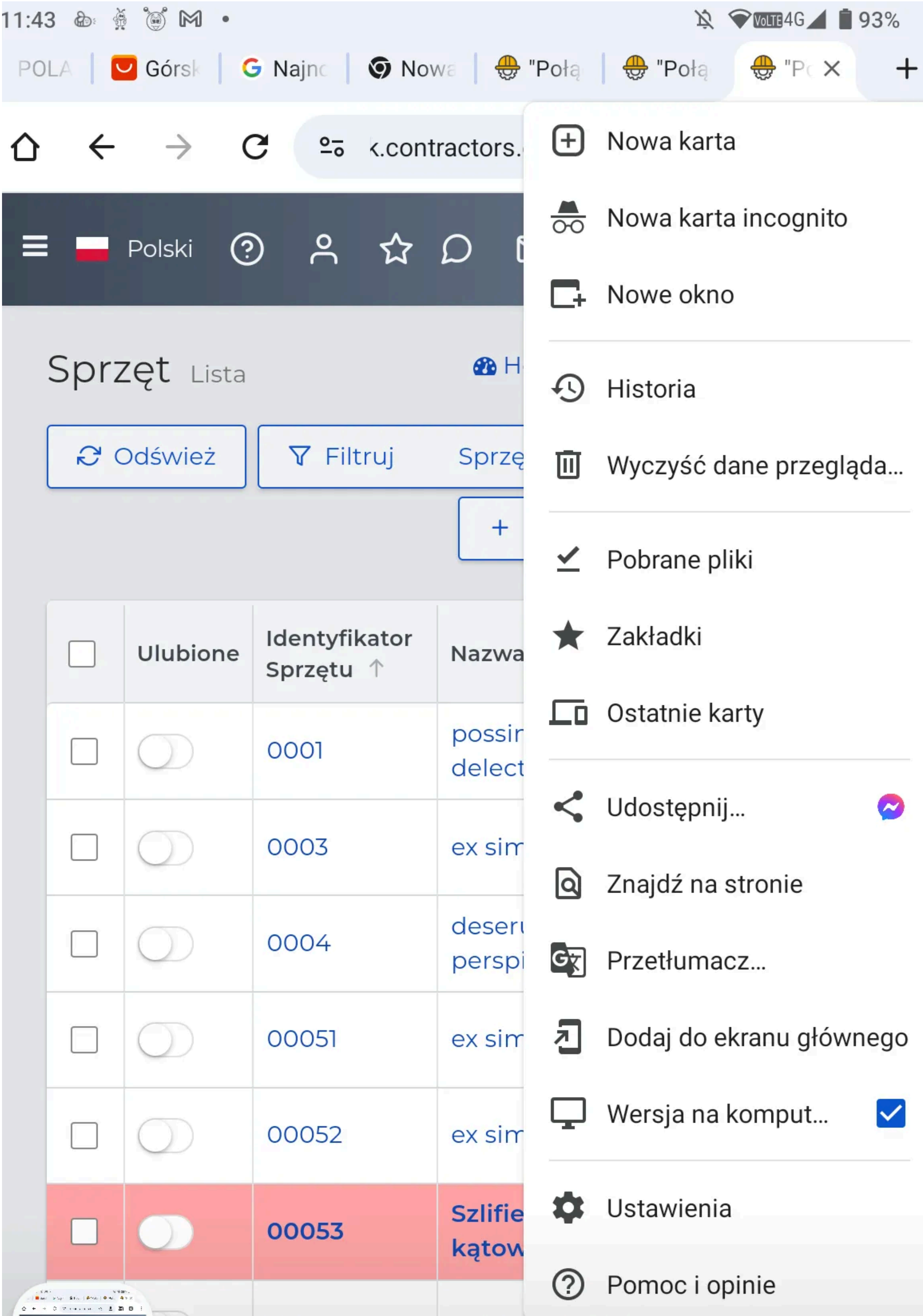
3. Scan the barcode from the equipment that is to be collected.

NOTE: If you do not have a barcode scanning program installed, a request to install the required program will be displayed on the mobile device.

4. In the displayed form regarding the return of the rented equipment, fill in the required fields,

5. Save the data using the "Confirm" button.

NOTE: If the "Scan barcode" button does not appear for you, make sure in the mobile device's web browser settings that the "Desktop version" is not selected. With the function enabled, the "Scan barcode" button will not be active.


11:43
93%
POLA
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Identyfikator Sprzętu
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ex sim
0004
deseru perspi
00051
ex sim
00052
ex sim
00053
Szlifie kątow
Nowa karta
Nowa karta incognito
Nowe okno
Historia
Wyczyść dane przegląda...
Pobrane pliki
Zakładki
Ostatnie karty
Udostępnij...
Znajdź na stronie
Przetłumacz...
Dodaj do ekranu głównego
Wersja na komput...
Ustawienia
Pomoc i opinie

Equipment Service

In this module, equipment sent for service inspection or repair is registered. Reporting equipment to the service list is done in the following order:

1. Go to the “Equipment -> Service” menu and click the “New” button.

2. Fill out the form, the meaning of the fields is as follows:

- **Equipment:** Indicate the type of equipment the service report concerns.

- **Date:** The date of handing over the equipment or device to the service.

- **Serviced by:** Specify the entity responsible for the service or repair. It can be any employee or external company selected from the list of available contacts.

- **Estimated return date:** The return date specified by the service technician.

- **Description**: Additional information related to the handover for repair, for example, existing problems, visible damage.

- **Meter reading before service:** Specifies the meter reading or other parameters of the equipment at the time of handing it over to the service.

- **Due to damage:** A field used to indicate whether the equipment was damaged during use.

- Choosing the option **“No”** - the equipment was not damaged during use.

- Choosing the option **“Yes”** - the equipment was damaged and it is necessary to select from the list the employee responsible for the damage, filling in the “Employee responsible for damage” field.

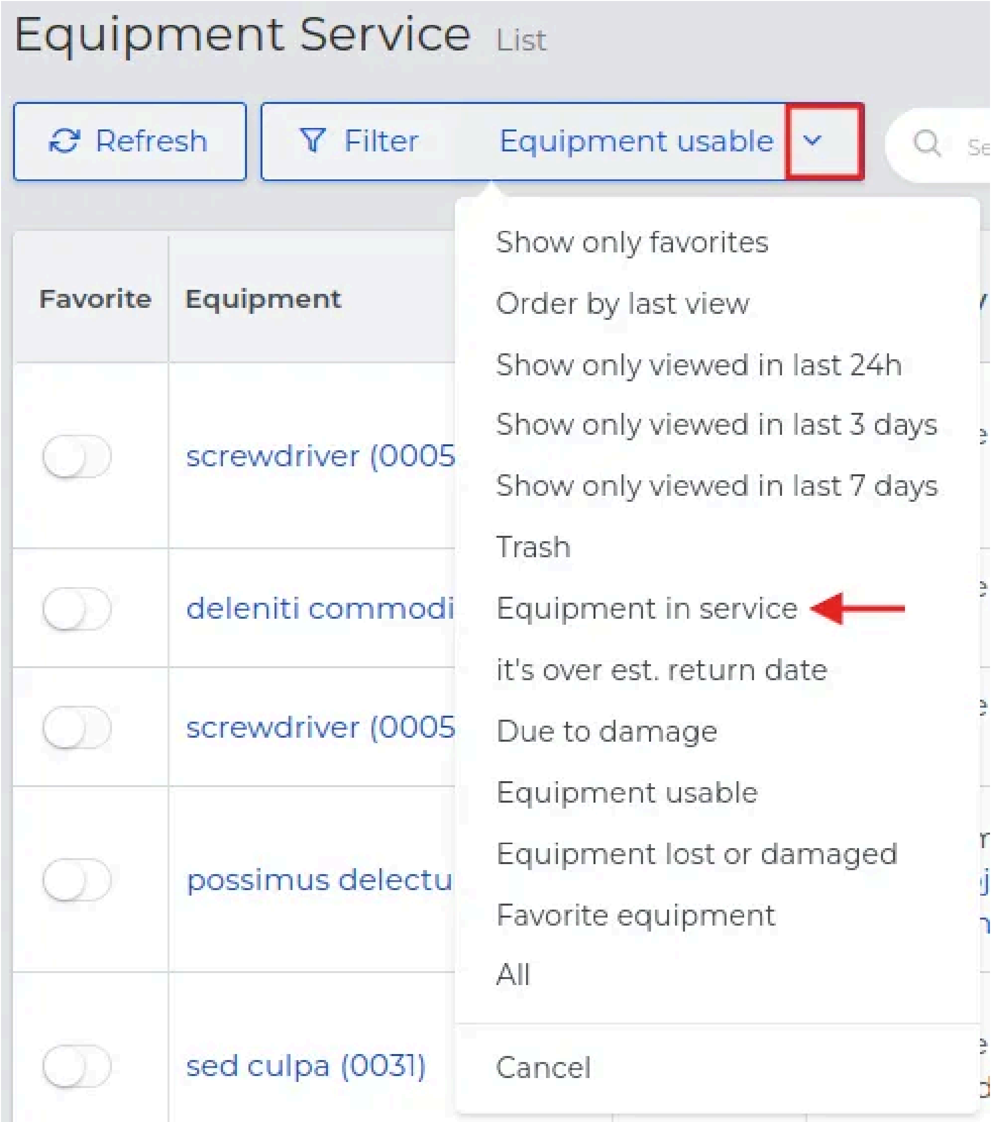
NOTE: If the device has already returned from service, fill in the “Return date” field.

3. Save the form using the “Confirm” button.

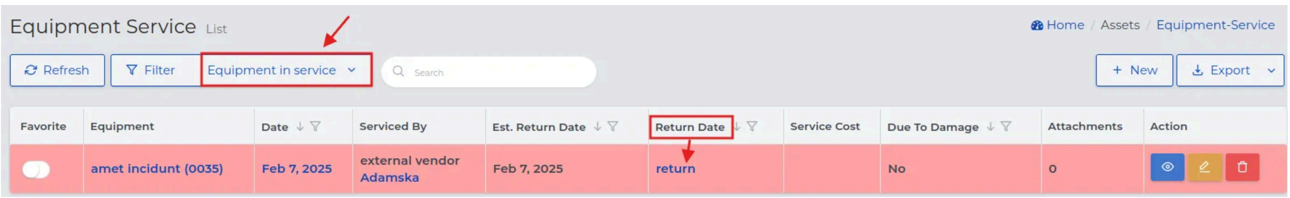
Acceptance of equipment from service

After the repair or service is completed, the transferred equipment is accepted back into the equipment warehouse. To record the acceptance of equipment from service in the system, follow the scheme:

1. Open the menu “List -> Service” and filter the list with records, using the “Equipment in service” option.



2. Find the equipment that is to be accepted from service or repair and in the “Return date” column click on the word “Return”.



3. Complete the form for accepting equipment from service to the equipment warehouse, paying attention to the fields:

- **Return date:** The date on which the equipment is collected from the service.
- **Cost:** The amount payable for the service performed.
- **Meter reading after collection from service:** The meter reading at the time of accepting the equipment.
- **Materials from our warehouse used for service:** If materials from the warehouse were used for the repair, select the “New” button and choose from the list its name, type of storage, and quantity.

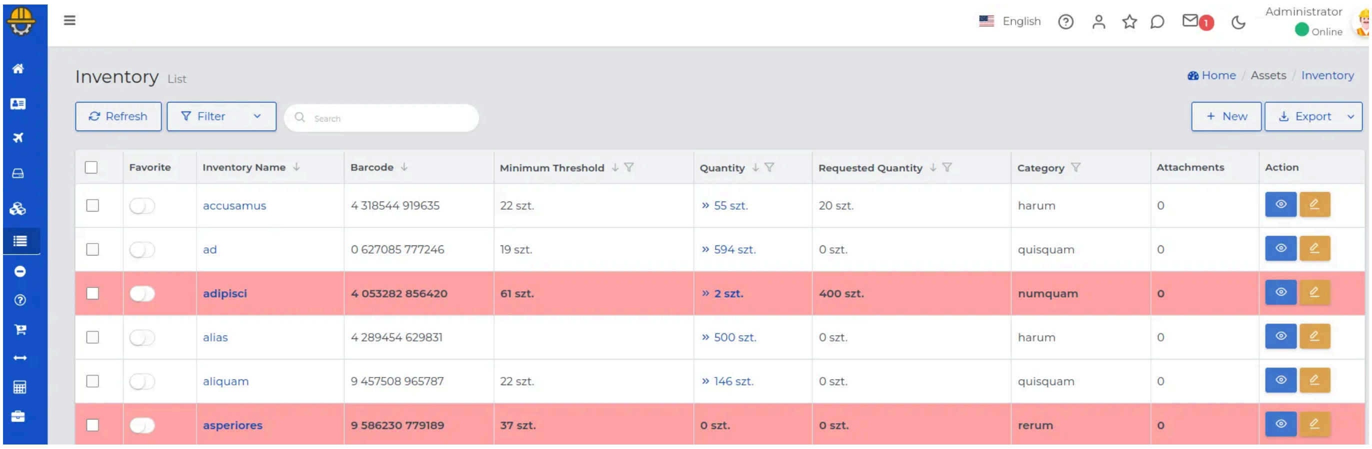
NOTE: The amount of material used for the repair of the equipment will be recorded as an expenditure.

- **Note:** Description of the service performed or the condition of the device after servicing.

REMEMBER: If an "Service interval" has been specified for the equipment, the registration based on meter readings will take into account the meter status after collection from service. This is important for further monitoring of equipment usage.

Inventory

The list of records in the **“Inventory -> Inventory browse”** section contains data regarding available quantity, requested quantity, and minimum level. The visible values allow for the control of inventory levels and the execution of material requests.



> **REMEMBER:** When the inventory level falls below the specified “Minimum level,” the material will be marked in red on the list of records, signaling the need to replenish stocks.

Using the action buttons, you can view, edit, or delete selected entries from the list. The record preview shows standard tabs available in different types of records where you can use auxiliary buttons. In each section, there is the possibility to filter the list, and detailed information on this can be found here.

Creating a materials list

You can import materials into the system by preparing the appropriate data file as described here, or add them to the list manually in the following order:

1. Open the “Inventory -> List” section from the menu and click the “New” button.

> **REMEMBER:** Before adding material to the inventory, make sure that an appropriate category for the resource has been created in the system. Details are described here.

2. Fill out the form, paying attention to the fields:

    - **Name:** This is the name that identifies the product being added to the inventory. It usually corresponds to the name given on the invoice from the Supplier, but it can be established according to the internal needs of the company.

- **Barcode:** A unique string of characters used to identify the material on a barcode label. This is not a required field.
- **Minimum level:** The value that specifies the minimum amount of material that should be maintained in inventory as a so-called "safety buffer."
- **Quantity unit:** The measure in which the material quantity is expressed, for example, kilograms (kg), running meters (mb), pieces (pcs), liters (l), etc.
- **Category:** Indicates the material's belonging to a specific group or classification.

- **Note:** Optional additional description or information related to the entry being created.

3. Save the data using the "Confirm" button.

Request for Quotation

Preparing orders for specific materials needed for project implementation often starts with submitting a request for quotation to the Supplier. After accepting the terms, you can change the status of the order being created and accept the material into the warehouse, or in the case of another inquiry to a different supplier, duplicate its content with the "Copy" button and easily send the inquiry.

ATTENTION: Choosing the appropriate status in the "Purchases" section allows for creating material price inquiries, placing orders, and marking goods in the system as delivered.

> **REMEMBER:** Before you proceed to create a request for quotation, make sure that the supplier it concerns has been entered into the system in the "Supplier" group.

To send a material price inquiry to the Supplier, follow the scheme:

1. Go to the "Inventory -> Purchases" menu and click the "New" button.

2. Fill out the form paying attention to the fields:

- **Date:** The date of document creation.
- **Supplier:** Select a record belonging to the "Supplier" group.
- **Status:** Determines the current stage for the record being created. Set to "Price Inquiry".
- > **Note:** Optionally additional description, information.
- **Items:** Add the names of the materials the price inquiry concerns.

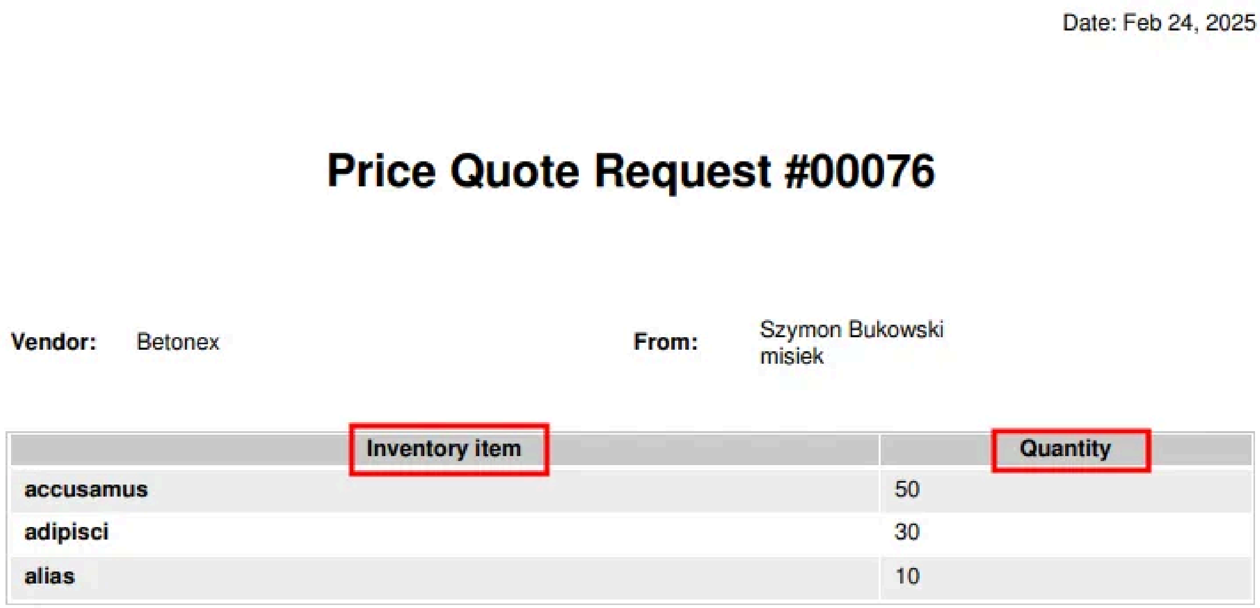
ATTENTION: If you want to add a material whose name is not in the system database, use the "Create" button, which will automatically add the material to the list without the need to close the currently displayed form.

3. Add more material names to the list being created with the inquiry and save the form with the "Confirm" button.

4. In the preview of the selected record, choose how to send the request for quotation to the Supplier. You can download the request for quotation in PDF format or send it as an email.

ATTENTION: The lack of an email address provided in the Supplier's contact will prevent the message from being sent electronically.

Example illustrating the appearance of a request for proposal saved in PDF version.


Date: Feb 24, 2025

Price Quote Request #00076

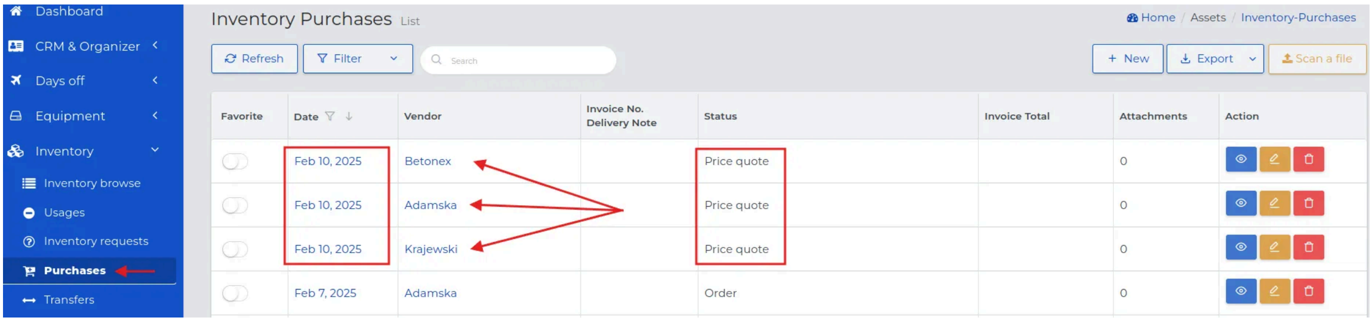
Vendor: Betonex

From: Szymon Bukowski
misiek

Inventory item	Quantity
accusamus	50
adipisci	30
alias	10

REMEMBER: You can send the same request for proposal to another Supplier using the “Copy” button, where in the form you change the name in the “Supplier” field, confirm the changes, and click the “Send request for proposal as an email” button again.

All copied requests for proposals, where another Supplier has been added, will be set in the list of records in the “Purchases” module in the order they were created. In the “Supplier” column, the subsequent Suppliers to whom the document was sent will be visible.



Updating the status of the request for proposal

Updating the status of the request for proposal allows tracking the progress of the process and effective coordination of actions related to a given request for proposal.

If you want to change the status of the visible “Request for proposal”, follow the scheme:

1. With the selected request for proposal, click the “Edit” action button and select a new status from the available: “Cancelled”, “Ordered” and “Delivered”.

REMEMBER: Cancelling a request for proposal will not remove it from the list of records. The entry will still be visible on the list with appropriately set filters.

2. For the statuses “Ordered” and “Delivered” fill out the form, where the meaning of additional fields is as follows:

- **Invoiced**: Determines the method of financial settlement for the ordered goods.
    - Choosing the option **“No”** - applies to orders processed at the Supplier on the basis of financial settlement issued, for example, at the end of the month.
    - Choosing the option **“Yes”** - applies to orders where prepayment for the purchase of goods before delivery is required, payable upon receipt, or with a short payment term, to which a sales invoice is attached.

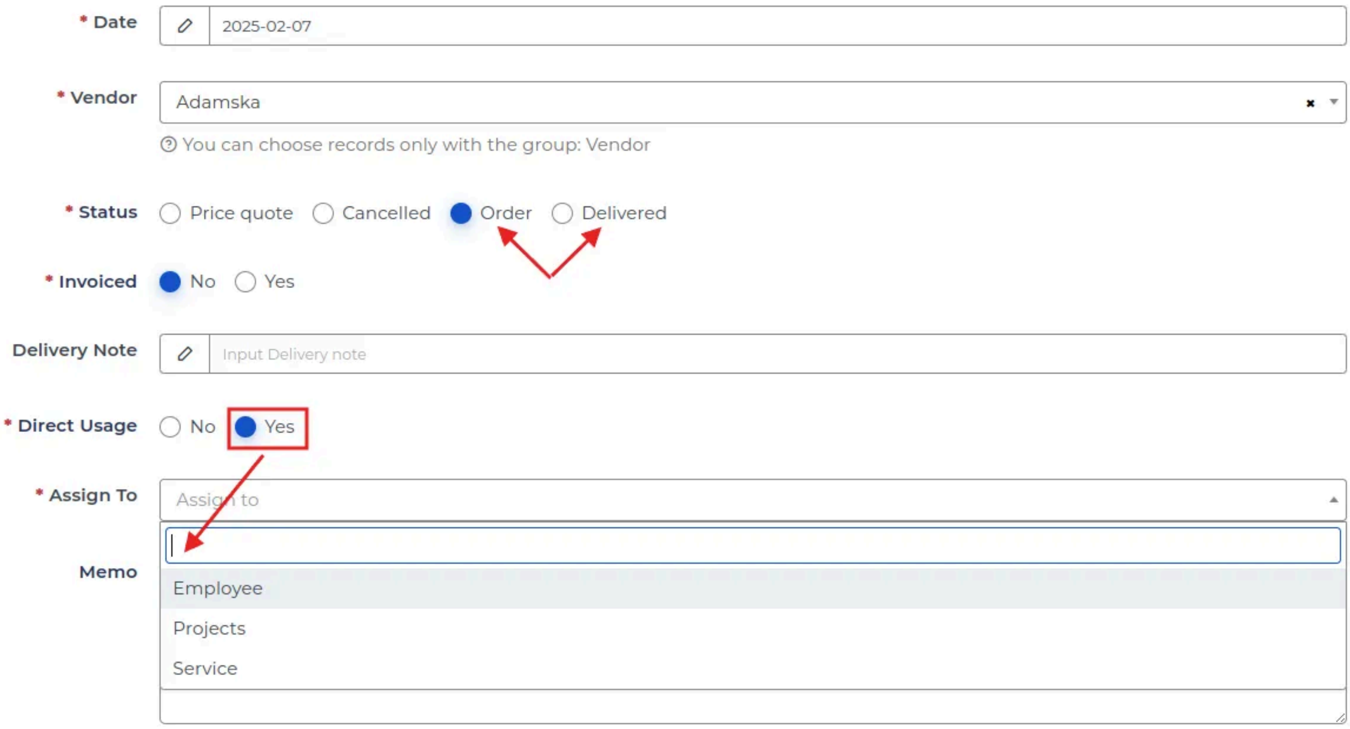
NOTE: Goods delivered without an invoice, for which a monthly settlement will be issued, can be moved between warehouses or projects without the need to enter their final price. After receiving the invoice and entering the prices, their cost will affect the profitability of the projects on which the material was or will be used.

- **Delivery Document:** This is a document confirming the receipt of goods into the warehouse, for which a registration number has been assigned. This field is mandatory when goods have been delivered without an invoice. It should include, for example, the number of the external issue document from the supplier's warehouse.

- **Direct Use**: Specify the destination where the ordered goods are needed and for which the consumption of the entered quantity will be automatically recorded. These are goods that cannot be transported to another construction site, such as ready-mixed concrete along with transport to a specific construction site.

    - Choosing the option **"No"** - the ordered goods will be put into stock and only then will it be possible to use them by generating consumption through the foreman, project manager, or another responsible person. Specify the value of the "Type of storage" field, allowing the choice between storing the material in the warehouse or its direct delivery to the project.

    - Choosing the option **"Yes"** - specify the direct consumption of the material for the selected target group, visible on the drop-down list in the "Assign to" field (Employee, Projects, Service).



3. Verify the values for the fields defining warehouse positions and save the form with the "Confirm" button.

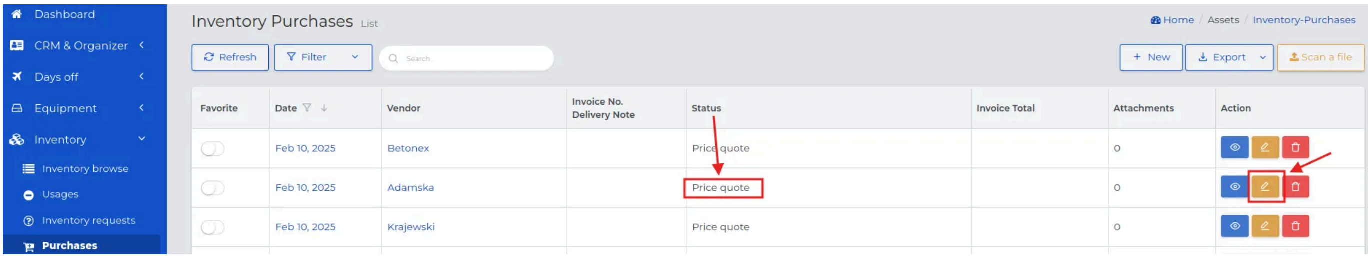
> **REMEMBER:** The ordered goods are added to the warehouse list after being delivered by the Supplier, regardless of whether an invoice has already been issued or not.

Ordering Materials

The system allows replenishing warehouse lists in four ways:

Method I: Ordering based on the Supplier's quotation.

1. Select the record with the status “Price Inquiry” from the “Menu -> Purchases” list and proceed to edit it.



2. In the form, change the status to “Order” and fill in the remaining fields.

3. Save the changes with the “Confirm” button.

> **REMEMBER:** Send the prepared and saved order to the Supplier via email.

Method II: Ordering copied from completed orders in the system.

1. Select the record with the status “Delivered” from the “Menu -> Purchases” list and go to its preview.

2. Click the “Copy” button.

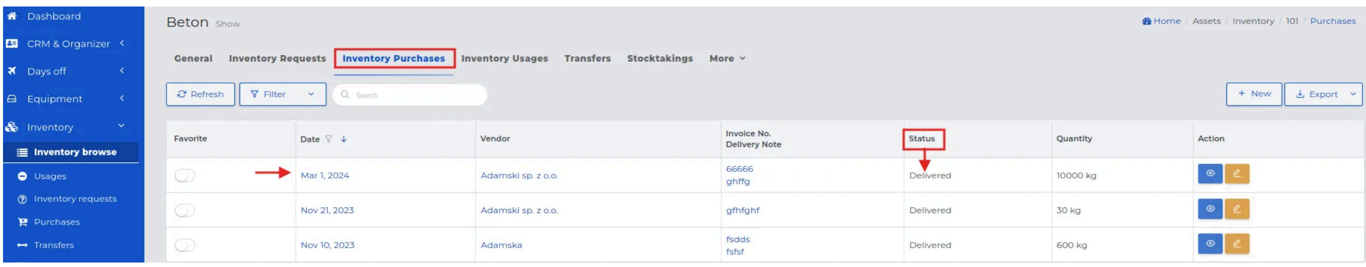
3. In the form, change the status to “Order”, fill in the remaining fields and save the changes using the “Confirm” button.

> **REMEMBER:** Send the prepared and saved order to the Supplier via email.

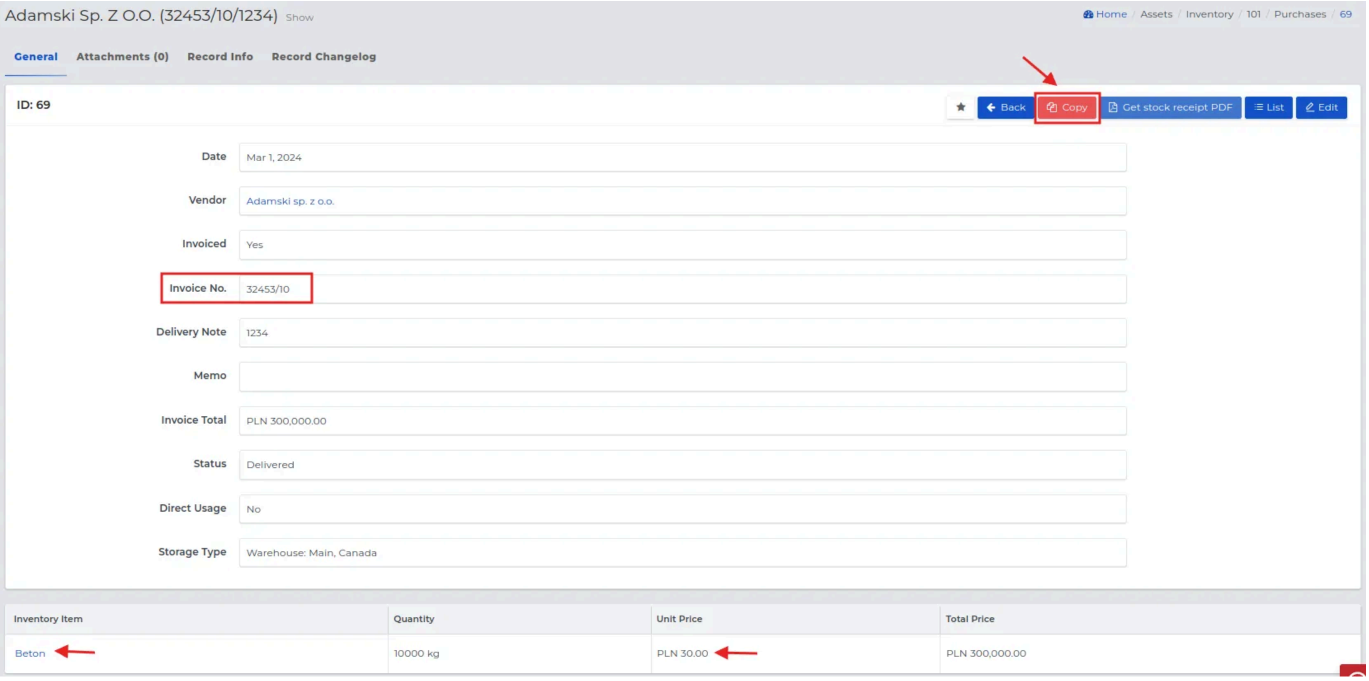
Method III: Creating a new order based on purchase invoices assigned to a given record on the materials list.

1. On the materials list available in the menu “Warehouse -> List”, select the material you want to reorder and click on its name.

2. Go to the “Purchases” tab and find the most recently issued purchase invoice using the filter on the column named “Date”.



3. Go to the order preview by clicking on the date of its issuance and check at what purchase price you acquired the selected material.



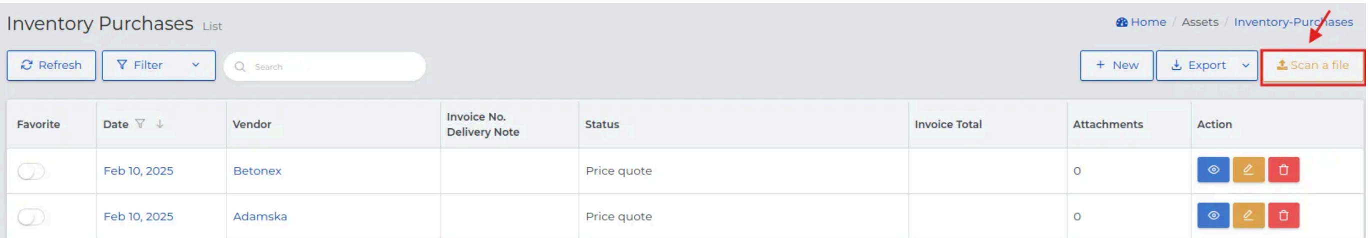
4. Copy the order, make any changes, verify the remaining fields in the form and save with the “Confirm” button.

> **REMEMBER:** Set the status to “Order” and send the document to the Supplier via email.

Method IV: Uploading to the system a file saved on the disk with the goods order in PDF format or as a photo of the document that was sent by the Supplier during the request for quotation.

> **REMEMBER:** Thanks to the automatic document reading feature, the Contractors.es system not only shortens the time needed to process documents but also minimizes employee work.

1. Above the purchases list available in the menu “Warehouse -> Purchases”, select the “Scan file” button.



2. Fill in the form displayed on the screen, paying attention to the following fields:

- **Status:** Choose the current status of the file you want to upload.
- **Direct use:** Optionally select whether the material will be directly used and assigned to one of the groups: Employee, Projects, Service.
- **Type of storage:** Choose the storage location for the material.
- **File Type:** The document format that will be uploaded to the system.

3. Upload the file using the “Browse” function and save the data using the “Submit” button.

> **REMEMBER:** Documents issued by Suppliers, with different formats and graphic layouts, are automatically read, grouped, and saved in the system according to the names of their headers, e.g., order, invoice, delivery document.

> **NOTE:** In the case of an order from a new Supplier, a record with their data is automatically created in the “CRM → Companies” module. You do not need to manually enter all the contact details from the invoice.

> **NOTE:** If the document contains names of goods that have not been available on the inventory list so far, the system automatically creates new records with names in the “Inventory → List” module. You can recognize such materials by the lack of a completed category. From time to time, filter the inventory list by selecting “No category” from the dropdown filter and complete the missing data in such products.

Example of data import into the system using the function of scanning an order saved in PDF format

1. Follow the scheme described above, for which the preview of the uploaded document is as follows:

Date of sale: 2021-01-21
Issue date: 2021-01-21
Due date: 2021-01-21
Payment method: Bank transfer

Buyer:
Summit Solutions
Unit 5e, Main 66,
19082 Philadelphia
Vat Number: 0101010101

Seller:
Pinnacle Group
Unit 5e, Street. Bland 66, 11201 New York
Vat Number: 0000000000
Bank: Santander
Account number: 000 00XX X0113 0303 0X0X X1X1 XX

Order 190/01/2021

#	Name	Quantity	Unit	Net price	Net amount	Tax rate	Tax amount	Gross amount
1	Universal mounting glue	20	Pcs.	$25.00	$500.00	10 %	$50.00	$550.00
2	White wall paint 5 liters	10	Pcs.	$40.00	$400.00	10 %	$40.00	$440.00
3	Mortar 0.5 liters	10	Pcs.	$32.00	$320.00	10 %	$32.00	$352.00
4	Epoxy grout 1 kg	5	Pcs.	$12.00	$60.00	10 %	$6.00	$66.00
5	Colorless sanitary silicone 0.5 liters	5	Pcs.	$6.00	$30.00	10 %	$3.00	$33.00
				TOTAL	$1310.00	X	$131.00	$1441.00
				Including	$1310.00	10 %	$131.00	$1441.00

Buyer signature:

…………………
John Nowak

Seller signature:

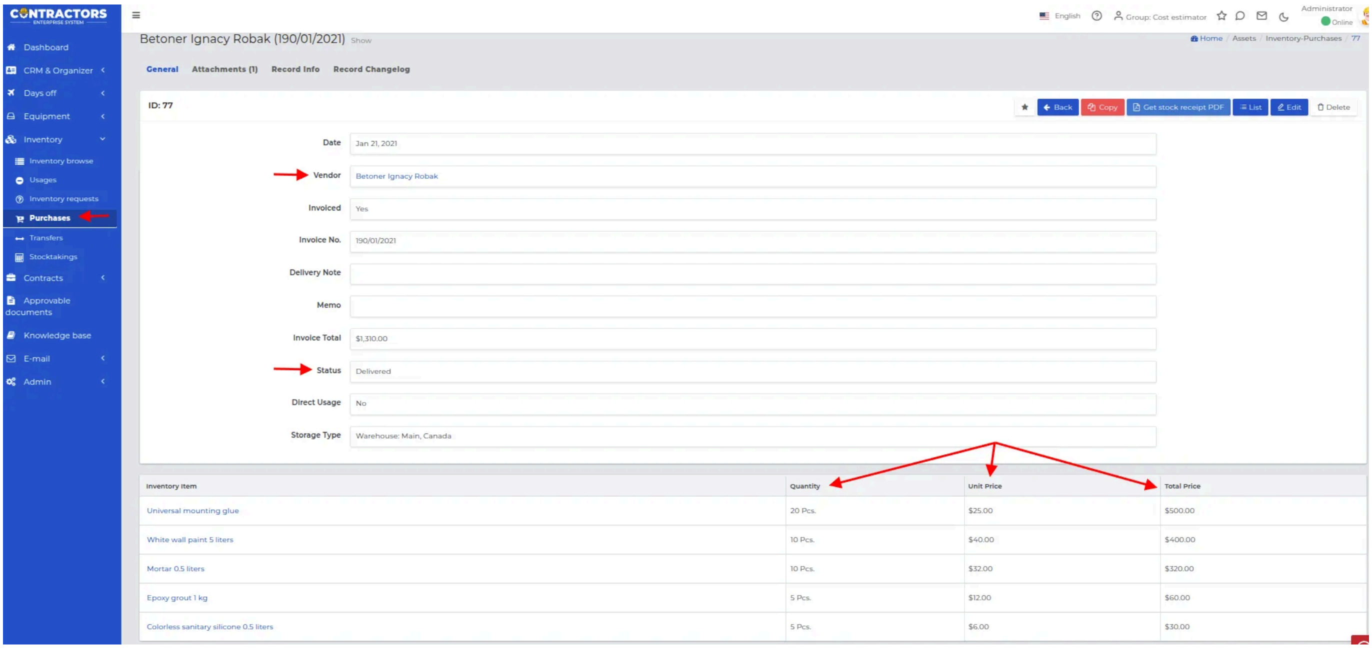
……………….

Barbara Smith

REMEMBER: You can change the status to “Delivered” only when you are uploading a delivery document or external issue document file, not an order file.

NOTE: When scanning the file, you can upload only one PDF document or several photos in the order of the document pages to the system at the same time. If the order of the pages does not match, the record may contain incorrect data or you will receive a document import error.

2. After saving the form, all the data from the order will be displayed, specifying at least the quantities and names of the ordered goods, status, serial number, and Supplier. Depending on the type of document, the unit price of the product and the total value for the ordered quantity of a given item may also be displayed.



3. Verify the values generated for entries marked in blue font. You can edit these values.

NOTE: Delivery Documents and External Issue Documents, transferred directly by the driver delivering the goods, can also be immediately registered in the system using the mobile application by the foreman.

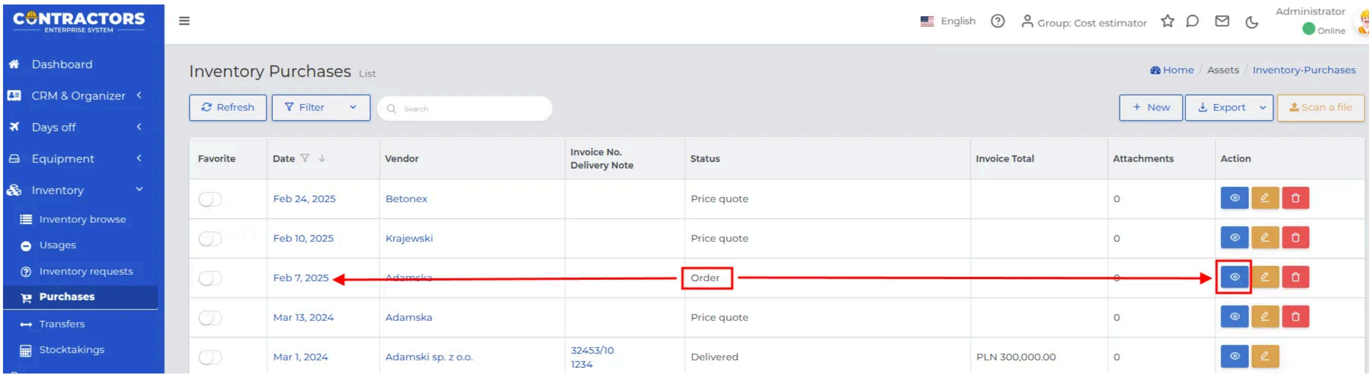
Receiving Materials into the Warehouse

The process of receiving materials into the warehouse is associated with changing the statuses in the records concerning orders from the Supplier. The delivered material will be summed up and visible on the warehouse list in the column named “Quantity”. The update of the available quantities of materials in the warehouse is done automatically, after performing the following steps regarding the receipt of materials into the warehouse.

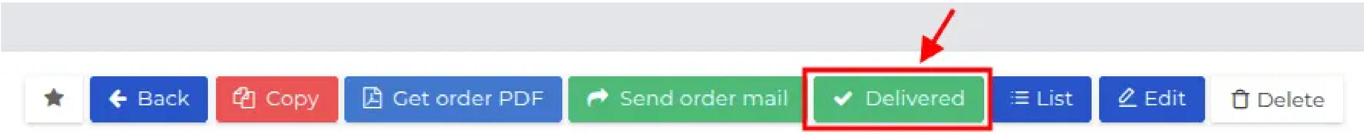
1. Go to the “Materials -> Purchases” menu and select the order at which you want to change the status to “Delivered”.

NOTE: The status to “Delivered” can only be changed based on a purchase document or delivery issued by the Supplier.

2. Click on its order date or use the “View” action button.



3. In the displayed preview, select the “Delivered” button.

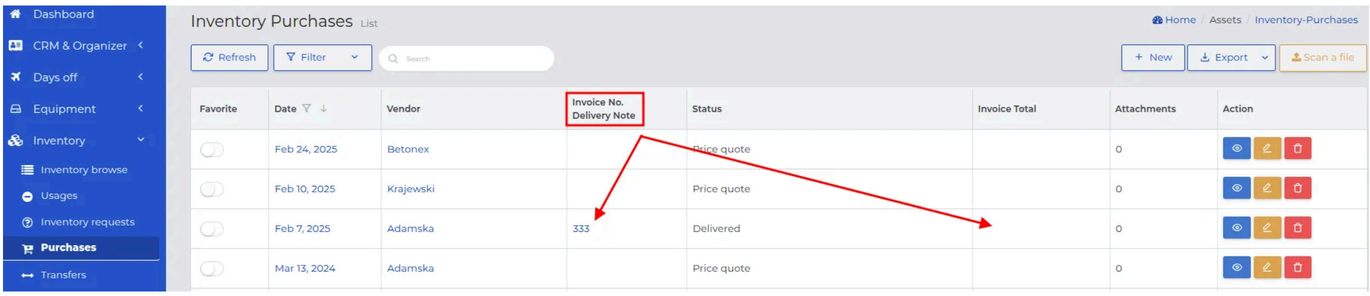


4. Fill in the displayed form and save the changes with the “Confirm” button.

REMEMBER: The statuses of material purchases can be reversed and changed according to the principle of “one step forward and one step back”.

NOTE: Orders for building materials covered by a collective invoice at the end of the settlement period can be used on projects without the need to enter purchase prices into the system.

REMEMBER: If goods are ordered and delivered without a registered purchase invoice, in the “Invoice Number/Delivery Document” column, only one document name will be visible instead of two. Additionally, the value in the “Total (Whole invoice)” field will not be filled in.



Low Warehouse Stock

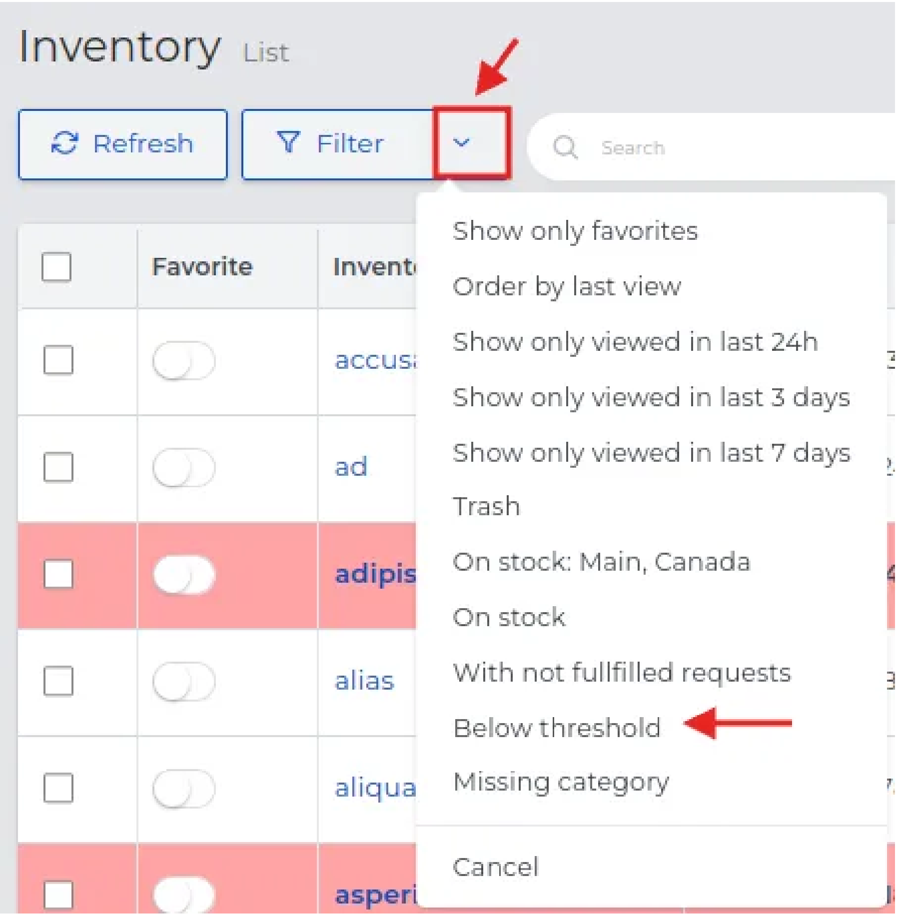
It is important to monitor and replenish the quantities of materials in the warehouse based on their consumption and reported needs.

> **NOTE:** Records with stock levels below the minimum are highlighted in red, signaling the need to order additional goods. Additionally, there is a widget on the dashboard informing about the too low stock levels of goods.

	Favorite	Inventory Name	Barcode	Minimum Threshold	Quantity	Requested Quantity	Category	Attachments	Action
		accusamus	4 318544 919635	22 pcs.	» 55 pcs.	20 pcs.	harum	0	
		ad	0 627085 777246	19 pcs.	» 594 pcs.	0 pcs.	quisquam	0	
		adipisci	4 053282 856420	61 pcs.	» 2 pcs.	400 pcs.	numquam	0	
		alias	4 289454 629831		» 500 pcs.	0 pcs.	harum	0	

Replenishing low warehouse stocks, you will perform according to the following steps:

1. Go to the “Warehouse -> List” menu and apply the “Below threshold” filter.



2. Among the records, select the type of material you want to replenish and click on its name or the “View” action button.

3. In the preview, go to the “Purchases” tab where you can choose how to place an order for the goods, by:

- Creating a new order using the “New” button.

- Copying a previously supplied order (with the possibility of editing it) and resending it to the Supplier as an order.

4. Save the selected form using the “Confirm” button.

REMEMBER: After changing the order status to "Delivered", the material can be registered in the system as consumption and fulfill reported demands by transferring it.

Material Expenditure

The full list of materials issued and used on projects will be visible in the "Warehouse → Expenditure" menu. This system module records all events related to the use of materials, both in terms of equipment service and their allocation to a specific employee.

REMEMBER: The final value for the used material will be included in the financial balance of the project.

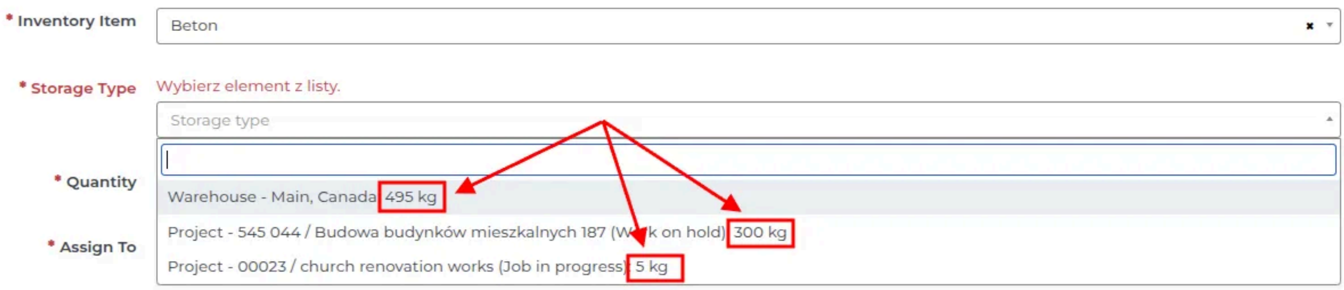
You can register the use of material in the system as follows:

1. Go to the "Warehouse - Expenditure" menu and select the "New" button.

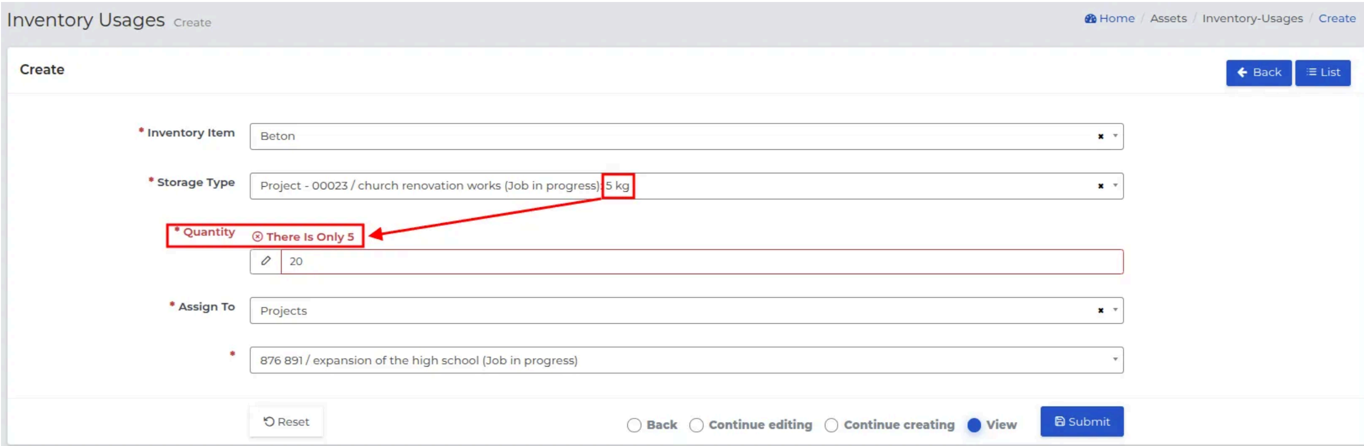
2. Fill out the form, the meaning of the fields is as follows:

- **Stock Item:** The name of the material that has been issued from the warehouse.
- **Storage Type:** An optional location (project or warehouse) where the selected material is available. It determines the source from which the material will be transported to the destination selected in the "Assign to" field.

REMEMBER: The current quantity of material is displayed for each storage type, allowing you to determine the source of transport.



NOTE: If there is not enough material in stock, in such a case, select the available quantity and save the material expenditure, and for the missing quantity, create a record concerning the demand for the material or generate an order for the missing amount.



- **Quantity:** Enter the amount of goods taken from the warehouse.

REMEMBER: If the material expenditure concerns a partial unit, defined in the system for a given type of material, it is possible to enter a fractional part for this consumption. Such a value should be specified in decimal form, entering it into the system after the dot, for example, 0.5 pcs.

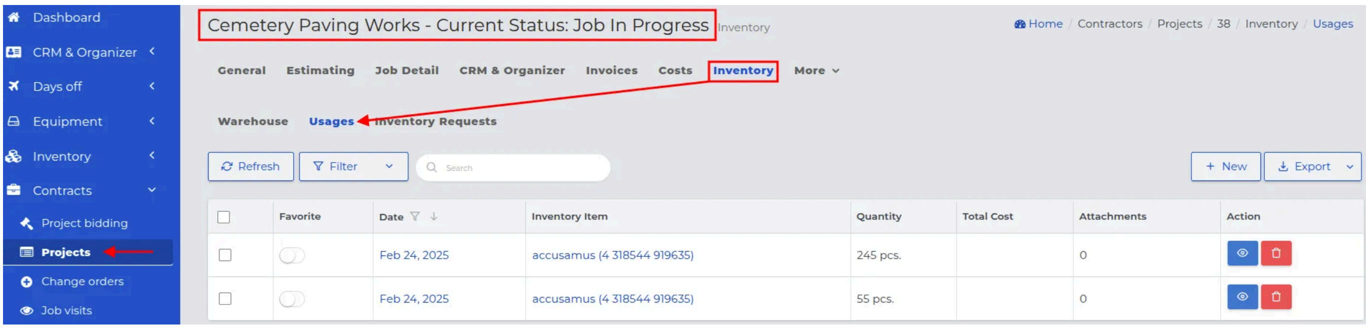
NOTE: During the inventory process, it is not possible to select goods to generate an outflow. Finish the inventory before creating an outflow record.

- **Assign to:** Specify the association for the outflow being created by selecting the target group from the available options: Employee, Projects, or Service.

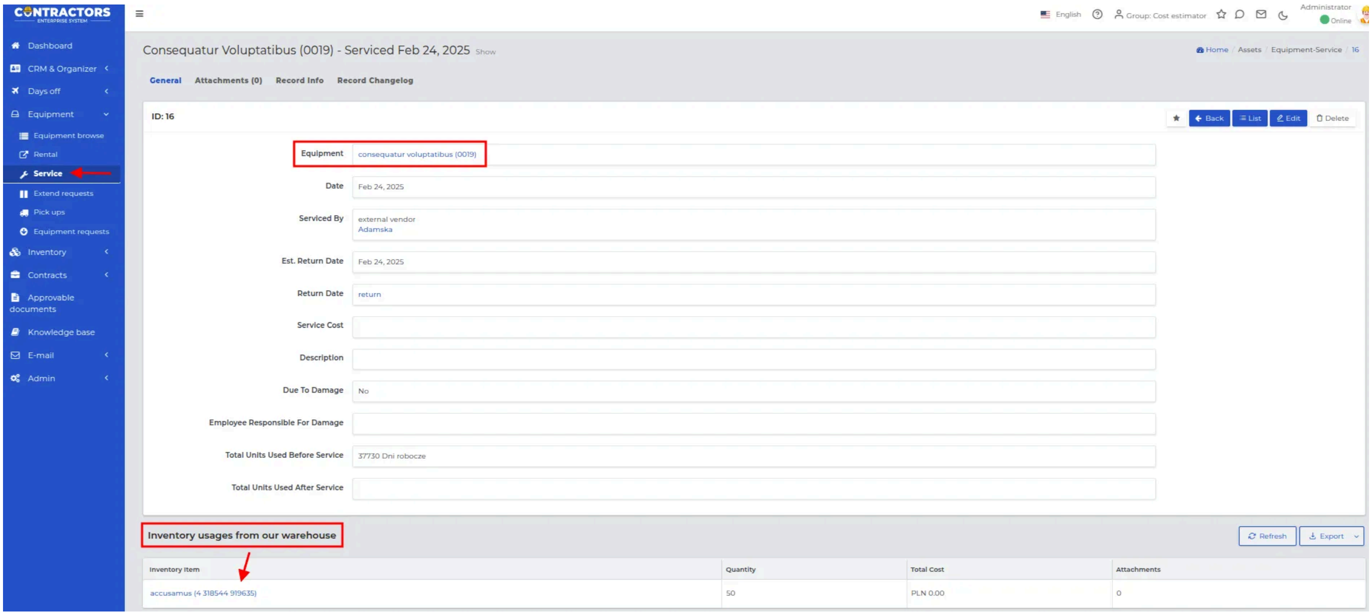
3. Save the form with the “Confirm” button.

Depending on the specified destination of the material, the quantities registered as outflow will be noted in the system in the following sections:

- **Contracts** → **Projects**, for the selected project on the list in the “More” tab → Warehouse → Outflows.



- **Equipment** → **Equipment Service**, denotes equipment that has been sent for service and requires repair, for which it is necessary to use materials from the warehouse.



- **Warehouse → Outflows**, material used directly by an employee will indicate on the list in the "Used by" column the person for whom the outflow was generated.

> **REMEMBER:** Using materials before issuing a collective invoice for their purchase may cause price deviations in the project's balance report until the invoice is entered.

Material Requirements

Reporting material requirements allows for the efficient execution of projects and ensures the provision of appropriate resources.

> **NOTE:** Each reported requirement can only concern one type of material or equipment per record entered into the system. Therefore, an employee needing several materials or pieces of equipment at the same time must enter each of them separately as a new record.

You can add a requirement for missing or needed material to the system in the following order:

1. Go to the "Warehouse -> Requirements" menu and click the "New" button.

2. Fill out the form, the meaning of the fields is as follows:

- **Needed by day**: Specify the deadline by which the material requirement should be met.
- **Material**: Select the required material from the list.

ATTENTION: If the required item is not available on the inventory list, first add it to the list, and then select it when creating the requisition.

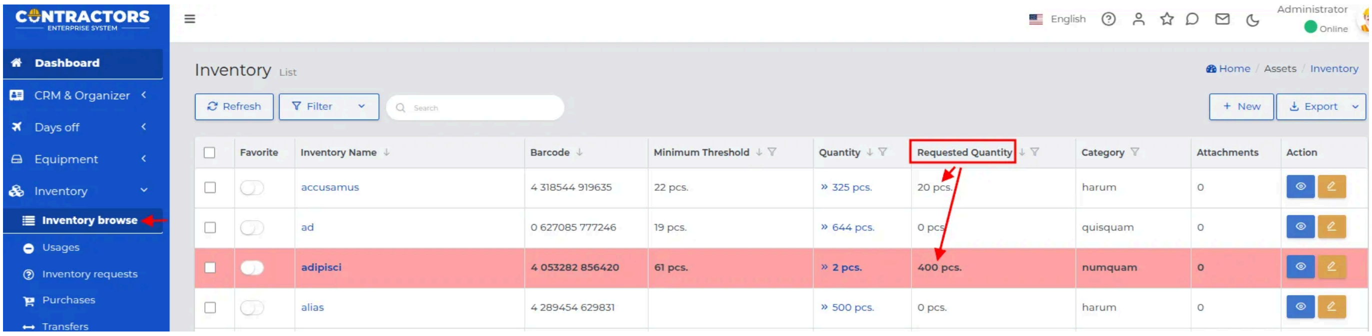
- **Quantity:** Specify the amount of material needed.
- **Assign to:** Define the association for the requisition being created by selecting the target group from the available options: Employee, Projects, or Service.

ATTENTION: For Employee and Service, the fulfillment of the requisition will generate material consumption (expenditure). A requisition assigned to a Project will create a record with "Inventory Transfer" with the status "Pending" during its fulfillment.

3. Save the form using the "Submit" button.

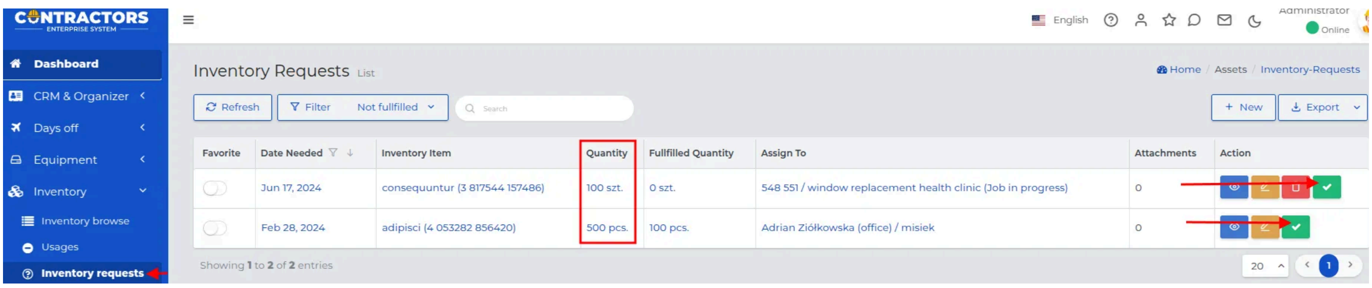
ATTENTION: Viewing the contents of records is always available, while their deletion is only possible when their fulfillment has not been started (partial or complete). During editing, it is possible to reduce the quantity of the requisition to the amount equal to the requisition fulfillment carried out so far.

In the records of the "Warehouse → List" menu, in the "Requested Quantity" column, the amount of material for which requisitions have been reported is visible.



ATTENTION: Records highlighted in red indicate the quantity of material below the defined minimum level and the situation where the quantity of material in stock is lower than the reported requisition.

> **REMEMBER:** After updating the inventory levels with the material reported in the requisition, its fulfillment will be possible, provided that the quantity of material in stock is sufficient.



ATTENTION: When creating a project estimate, it is possible to supplement the necessary materials. The project manager can generate material requisitions based on such an estimate using the button in the materials table in the project estimate tab.

Fulfillment of material requisitions

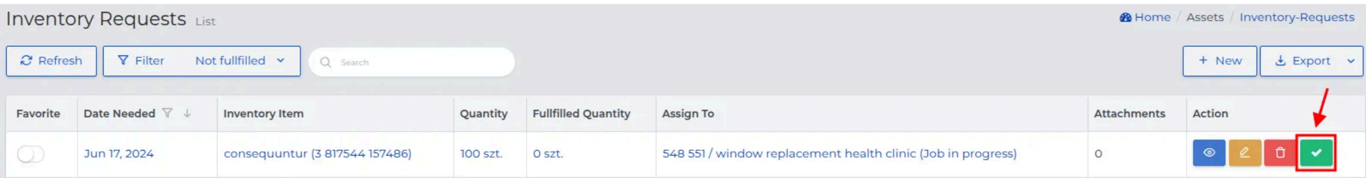
To fulfill a reported material requisition, proceed in the following order:

1. Go to the “Warehouse -> Requisitions” menu and set the list of records according to one of the available filters: “Partially Fulfilled” or “Not Fulfilled”.

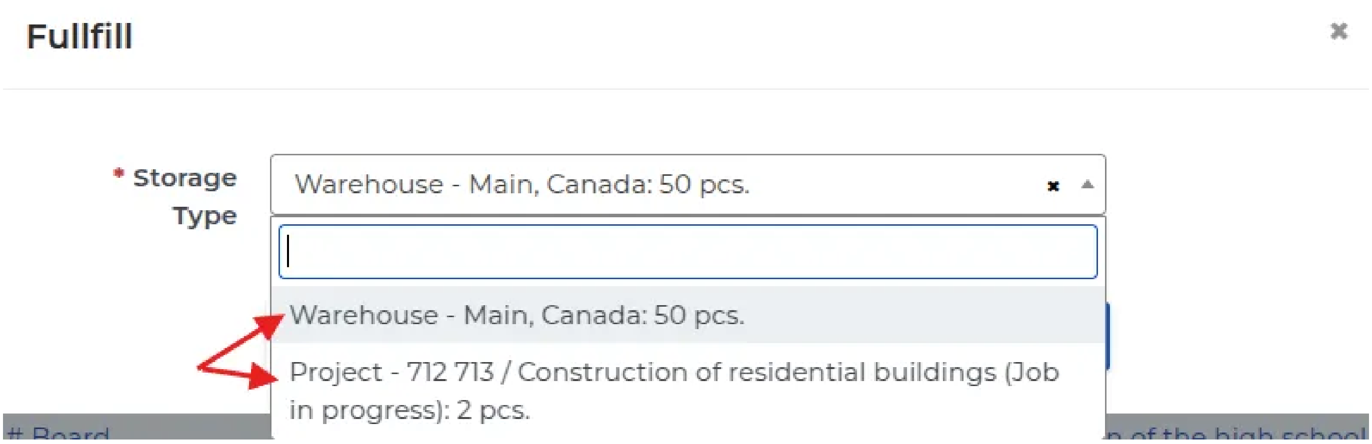
> **REMEMBER:** To narrow down the displayed list, use the “Detailed Filter”.

2. Select the record with the demand you want to fulfill and click the “Fulfill” action button.

> **REMEMBER:** An active “Fulfill” button means that the demand visible on the list can be fulfilled, in whole or in part, because the material is available in storage locations.



3. Specify from which storage location the material is to be moved.

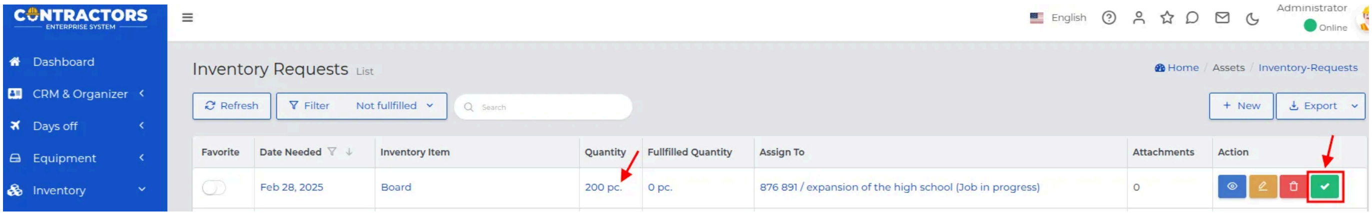


> **REMEMBER:** If the quantity of material in stock is not sufficient to fully meet the reported demand, then the fulfillment of the demand remains on the list of records as “Partially fulfilled” with information on the quantity of items fulfilled so far.

4. Save the form with the “Confirm” button.

Example: Partial fulfillment of an employee's reported material demand.

1. The list of records shows a demand for 300 pieces of boards.



2. We check how many boards are currently in stock.

NOTE: The number of boards in stock is 200 pieces, which means it is lower than the reported demand for 300 pieces. Therefore, the record has been highlighted in red.

3. We know that we are still short of 100 pieces of boards to fully fulfill the order.

4. We return to the list where the request is located and fulfill the demand for 200 pieces of available boards, using the "Fulfill" action button.

5. We go back to the list of materials and see that the current stock level of boards is now zero, and the requested quantity has been reduced to the 100 pieces of boards we are missing. Therefore, it is necessary to place an order.

6. We create an order for 100 pieces of boards in the "Warehouse -> Purchases" menu.

7. When the goods are delivered to the warehouse by the Supplier, our stock level will be replenished, which will enable the continuation of demand fulfillment according to the description in point 4.

REMEMBER: Fulfilling a requirement will generate an expenditure (consumption of material per worker, e.g., gloves) or the transfer of material to a project.

Warehouse Transfers

Warehouse transfers are the process of moving materials or equipment from one storage location to another, increasing workflow fluidity on projects.

Warehouse transfers may concern situations:

- Verification of unused materials on the project and their return to the “Main Warehouse”.
- Demand for material not available in the target warehouse, which must be transported to the ongoing construction from another storage location.
- Lack of space for ordered material at the target storage site, which requires its storage elsewhere.

> **REMEMBER:** In the case of borrowing material from another currently ongoing project, it is necessary to register in the system the demand for the transferred amount of material and then order it to stock.

ATTENTION: A warehouse transfer is a change in the storage location of goods, whose expenditure must be appropriately marked during the execution of a specific project.

> **REMEMBER:** Special marking of the material that will be subject to warehouse transfer, for example by placing reservation description tape on it, will protect against its use by an employee unaware of the planned transfer of goods. If there is a planned transfer in the system, it is not possible to generate an expenditure of material being transferred, so it may happen that there will be less material available in the system to generate an expenditure than there is physically.

The method of creating a warehouse transfer proceeds in the following order:

1. Go to the menu “Warehouse -> Transfers” and click the “New” button.
2. Fill out the form, specifying the pickup and transfer locations of the goods, whose field meanings are as follows:

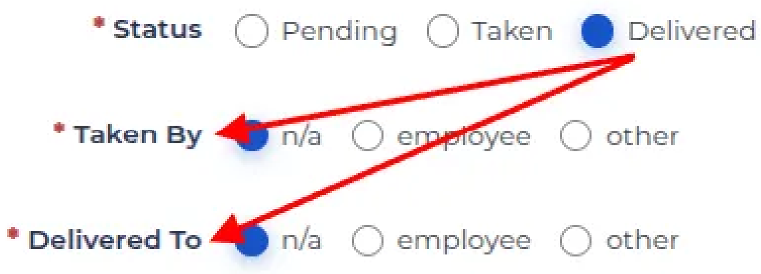
- **Source Warehouse:** Specifies the place from which the needed material will be collected. It can be a warehouse or project selected from the list.
- **Target Warehouse:** Indicates the place to which the material from the source warehouse will be transported. The system allows for the selection from the list of another warehouse or project.

> **NOTE:** The source warehouse can be any project, regardless of its current status. This means that material remaining on a project that has already been completed can be reported for collection and transported to the destination warehouse.

3. Save the data using the “Submit” button.
4. In the next visible form, enter the information concerning the goods that the registered warehouse transfer will pertain to. The meaning of the fields is as follows:

- **Status:** Specifies the current state of the transfer, set in chronological order: Pending, Taken, Delivered.

> **REMEMBER:** When changing the status of the warehouse transfer to “Taken” or “Delivered”, you must mark who transported or received the goods.



- **Warehouse Item:** Selection from the list of those materials belonging to the “Source Warehouse” that are to be transferred to the “Destination Warehouse”.
- **Quantity**: A numerical value specifying how many units are to be taken.

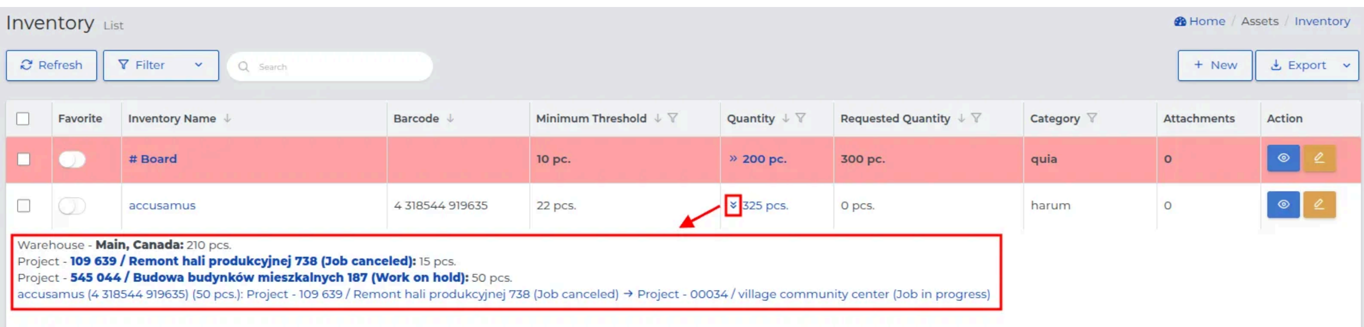
> **NOTE:** The names of materials visible on the dropdown list in the “Warehouse Item” field specify in parentheses the quantity of that material that should be there.

> **REMEMBER:** If you want to take all the materials from the “Source Warehouse”, add more items using the “New” button, and in the “Quantity” field enter the number visible in parentheses. Proceed in this manner until the last material from the list is selected.

> **NOTE:** We create warehouse transfers as separate records on the list, where for each type of material we separately define the source and destination warehouses.

5. Save the changes made using the “Submit” button.

> **REMEMBER:** In the “Quantity” column on the “Warehouse List” next to the selected record, there are all available storage places for that material, along with the total quantity corresponding to the total warehouse stock available for use.

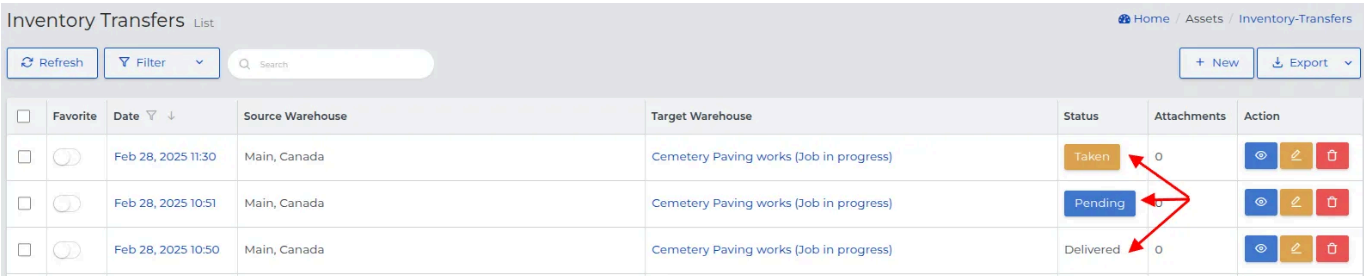


Changing the statuses of warehouse transfers

Changing the statuses for warehouse transfers allows tracking the progress and current state of each movement of goods in the system.

If you want to change the status for reported warehouse transfers, follow the sequence:

1. Open the list of entries in the menu “Warehouse -> Transfers” and click on the name of the current status visible in the “Status” column for the selected record.



REMEMBER: Accurately marking employees or persons responsible for receiving or delivering goods is crucial for monitoring the history of material movement and ensuring transparency in warehouse management.

2. Complete the form and save it with the “Confirm” button.

NOTE: Reporting material consumption will only be possible for transfers with the status “Delivered”.

Inventories

The inventory process includes systematic checking and updating of warehouse stock levels, both in the main warehouse and on projects where warehouse transfers are possible.

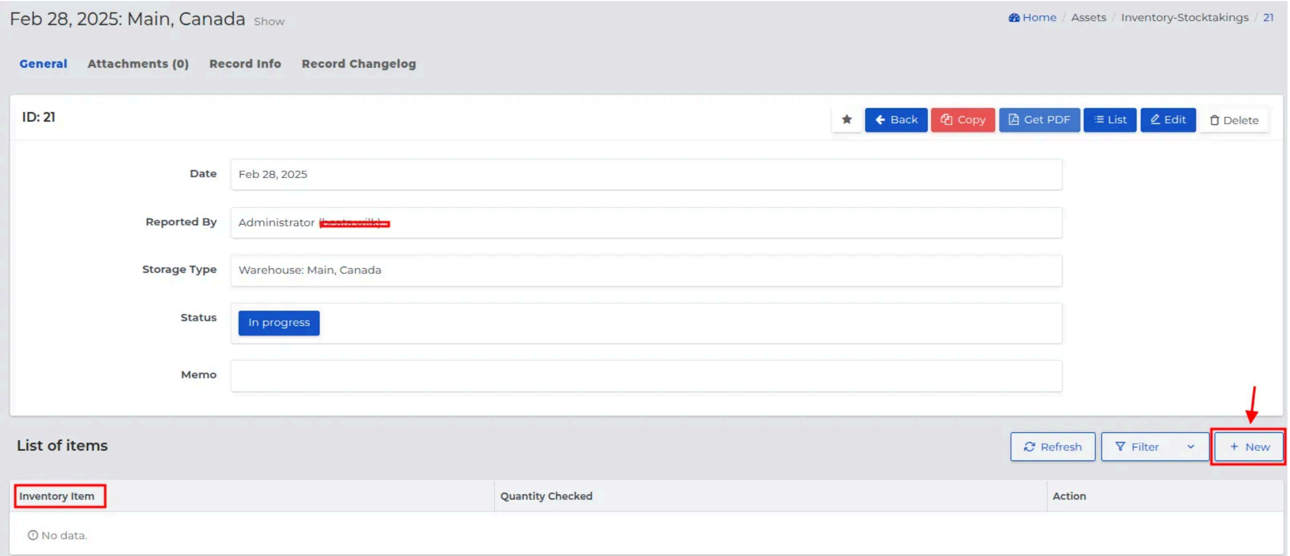
In the system, depending on the need, inventory can be performed in two ways:

Method I: The system allows you to create a list of materials based on a manually prepared inventory, where it is not necessary to specify their quantities.

1. Go to the menu “Warehouse -> Inventories” and select the “New” button.

2. Specify the “Type of storage” from the available options “Warehouse” or “Project”.

3. Add “Warehouse items” by selecting the “New” button.



4. Save the selection of materials from the list along with their quantity (optionally) using the “Confirm” button.

REMEMBER: If you consider the inventory to be completed, change its status to “Completed”.

REMEMBER: You can download the prepared inventory to disk in PDF format using the “Download PDF” function button.

NOTE: For inventories created during the suspension of operations, where the quantity of materials should not change from the time of the last entered inventory, you can copy the last list using the “Copy” function button by entering the new date of its creation.

Method II: The system automatically allows you to create a full inventory of materials located in the selected warehouse or project.

1. Above the list of records available in the menu “Warehouse -> Inventories”, use the functional button “Create full warehouse inventory”.
2. In the form, specify the “Type of storage” that the inventory should cover, by selecting a specific project or warehouse from the drop-down list.
3. For the field “Pre-fill quantities according to recorded warehouse stocks”, specify:

- Whether the quantities of materials are to be generated by the system based on theoretical warehouse stocks, by selecting the option **“Yes”.**
- Whether the values specifying quantities are to be omitted, leaving only the names of the materials on the list, by selecting the option **“No”**.

REMEMBER: You should verify the items on the inventory and modify/complete the quantity using the “Edit” action button next to the material row.

4. Save the form using the “Confirm” button.

> **NOTE:** A full list of materials without their generated quantities can serve as a template for preparing the inventory by an employee who is to count certain types of materials in the warehouse or project. Such a list can be printed and handed over for completion.

> **REMEMBER:** During the inventory process, materials in the inventory warehouse for which a quantity has been entered are blocked.

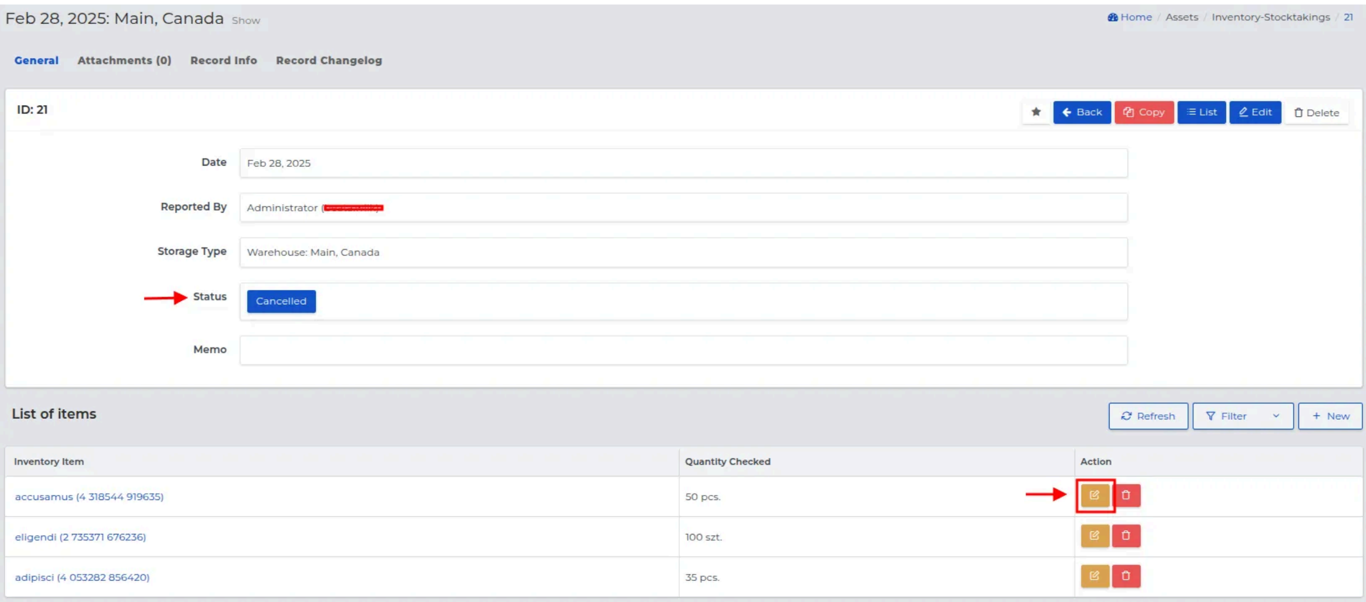
Inventory Completion

The purpose of completing the inventory process is to confirm the current warehouse stocks. The inventory is considered completed when its status changes. The procedure for changing the inventory status proceeds in the following order:

1. Click the “Edit” button next to the inventory list you want to change the status of.

2. In the form, determine the new status from the available options: “Cancelled” and “Completed”.

> **NOTE:** Return to the inventory list using the “List” button and at the selected inventory, choose the “View” action button to be able to edit the inventory items entered so far.

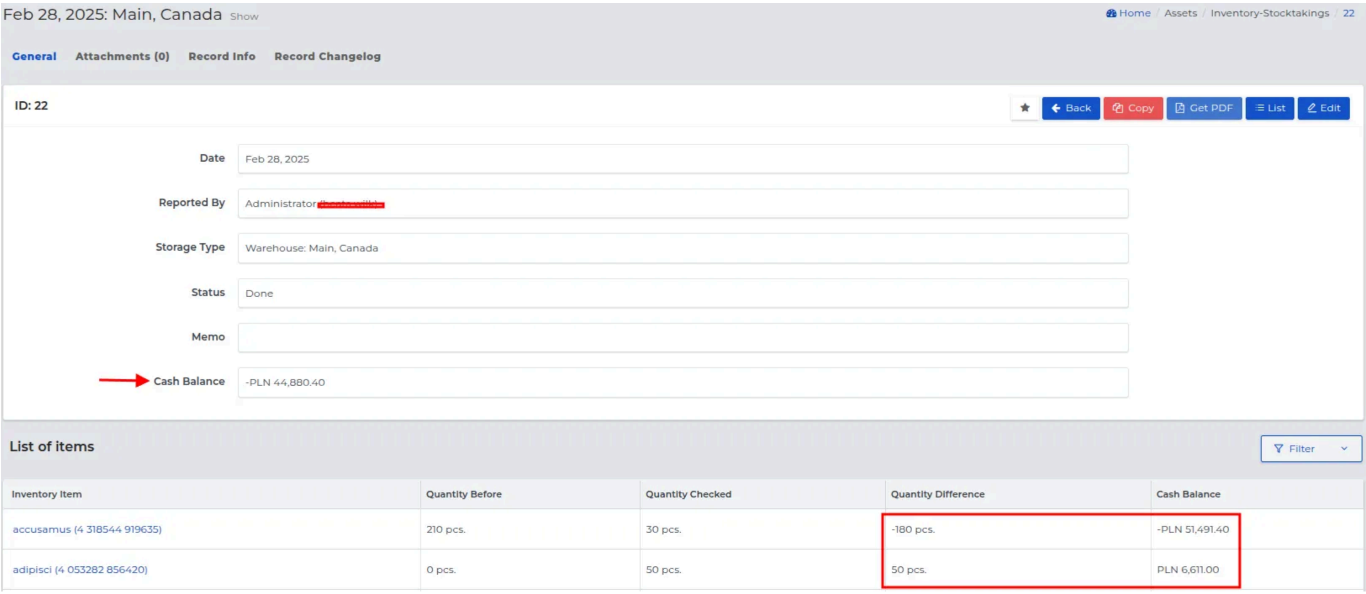


3. Save the data using the “Confirm” button.

> **REMEMBER:** Changing the status is also available in the record preview, after clicking on the name of the current status.

NOTE: In an inventory with the status “Completed,” you cannot edit the quantities of materials, nor can you delete it from the system.

REMEMBER: After completing the inventory, it is recommended to conduct a detailed analysis of any differences in material quantities to identify potential issues or areas that can be optimized.



The difference in quantity noted in the screenshot above presents the “Financial Balance,” which reflects changes in stock values in relation to the quantities that should physically be in the warehouse or the project to which the inventory pertains.

Frequently Asked Questions

1. **How can I check the stock level of a material in the system?**

   You can check the stock level of a material in the "Warehouse -> List" section, where information about the available quantity, requested quantity, and the minimum level set for a given type of goods is visible.

2. **How can I set the service interval for equipment?**

   You can set the service interval for equipment when adding new equipment in the "Equipment -> List" section. You have two options: service based on meter readings and service based on time.

3. **Can I import a resource list into the system?**

   Yes, you do not have to manually enter each piece of equipment and material into the system. You can upload a properly prepared file with a database containing the company's resources, as described here.

4. **What is the "minimum stock level"?**

   It is a value that determines the quantity that should always be available in the warehouse as a so-called "safety buffer". If the quantity of material falls below the set minimum value, the record will be marked in red on the list.

5. **How can I monitor service dates for equipment?**

   Equipment that has exceeded the service interval, set when adding it to the equipment list, will be marked in red on the list.

6. **Does the system allow sending a request for quotation to the supplier electronically?**

   Yes, a request for quotation can be sent to the supplier as an email if their address has been added to their contact in the system. Simply select the "Send request for quotation as an email" button in the request for quotation record preview, and the email address will fill in automatically.

7. **Can I send the same request for quotation to different suppliers?**

   Yes, you can copy the request for quotation and send it to subsequent suppliers from the list. In the preview, select the "Copy" button, set a new supplier, and save the form. If there are to be more inquiries, create a new record for each by copying the previous one.

8. **How to add a material to the order that is not in the database?**

   If you want to add a material that is not in the system database, use the green "Create" button, which will automatically add the material to the list without the need to close the currently displayed form.

9. **Can I use materials for which a collective invoice will be issued later from several deliveries?**

Yes, the ordered goods are added to the inventory list after being delivered by the supplier. There is no need to block materials until the collective invoice is issued; they can be used. For these materials, their purchase price is not entered into the system, only the quantity. After filling in the purchase prices based on the invoice, their cost will be included in the costs of the projects on which the expenditures were generated.

10. **How to change the order status to "Delivered"?**

    Go to the "Materials -> Purchases" menu and select the order in which you want to change the status. Click the "View" button, then in the form select the "Delivered" status option and save the changes.

11. **How do I know that an order has not been invoiced?**

    An uninvoiced order will have only one document name, e.g., delivery proof, and the "Total (Whole invoice)" field will remain unfilled. You can filter the purchase list by the invoice issuance status.

12. **Does the system remember the last purchase price of goods when creating estimates?**

    Yes, the last entered purchase value of a given item will be automatically suggested in the next created estimate. This amount can always be changed.

13. **How do I know when a material is running out in the warehouse?**

    Materials whose inventory level has fallen below the minimum value are highlighted in red on the inventory list.

14. **I need more material than is in stock, what should I do?**

    Choose the available quantity and save the material expenditure, and for the missing quantity, create a record concerning the demand for the material.

15. **How can I define the amount of material if the consumption concerns a partial unit?**

    If the material consumption concerns a partial unit, you will define this amount using a fractional value, specified in decimal form, e.g., 0.5 pieces, by entering it after the dot.

16. **How can I report a need for material that is not on the inventory list?**

    If the material is not on the inventory list, first add it to the list, and then report the need for this material.

17. **What does it mean that the equipment requirement is assigned to a specific project or client?**

    Assigning the equipment requirement to a specific project or client means that the notification concerns equipment needed for the implementation of a specific task or service, selected from the "Project" or "Client" records list.

18. **How can I specify the deadline by which my material or equipment requirement should be met?**

    The deadline by which the material or equipment requirement should be met is specified in the requirement reporting form by filling in the "Needed by day" or "Equipment needed from day" field.

19. **What does the "Requested quantity" column in the "Warehouse -> List" menu records indicate?**

    The "Requested quantity" column in the "Warehouse -> List" menu records shows the amount of material needed to complete the started orders for which a requirement has been reported.

20. **What, besides low inventory levels, might the records highlighted in red indicate?**

    Records in which the quantity of material in stock is lower than the reported requirements are also highlighted in red.

21. **Is it possible to report a requirement for several materials or pieces of equipment at the same time using a single record in the system?**

    No, each reported requirement can only concern one type of material or equipment per single record entered into the system. An employee needing several materials or pieces of equipment at the same time must enter each of them separately as a new record.

22. **How are material requirements that are assigned to an employee, service, and project registered in the system?**

    For the employee and service, the requirement will be recorded as consumption (material expenditure). Assigned to the project, it will create a record with "Warehouse Transfer" with the status "Pending" (waiting for preparation and transportation).

23. **How will I know that a requirement request can be fulfilled?**

    For records with requests where the quantity of materials is sufficient, a green "Fulfill" button is visible.

24. **Do I have to provide the exact name of the equipment I need?**

    No, the equipment name does not have to be identical to the items found in the company's warehouse. You can enter it freely. The employee responsible for fulfilling the requirements will appropriately select the equipment from those available in the warehouse.

25. **Why can't I edit records on the list of requirement requests?**

    Records with requirement requests for which their fulfillment has been initiated (partial or complete) cannot be edited. If you want to make changes in quantities, inform the person responsible for fulfilling the requests or create a new request.

26. **Where can I check how much of the employee's reported requirement has not yet been fulfilled?**

    If the quantity of material in the warehouse is not sufficient to fully fulfill the reported requirement, then the fulfillment of the requirement remains on the list of records "Partially fulfilled" with information about the quantity of items fulfilled so far.

27. **What to do if an employee is interested in specific equipment, but it is not available at the moment?**

    You should check the return date on the "Rental Register" list and inform the employee when it could be available for rental.

28. **What should be done if the person renting the equipment does not belong to any of the groups of employees or subcontractors?**

    If the person renting the equipment does not belong to any of the groups of employees or subcontractors, you can enter their details in the field "Other -> Who is responsible".

29. **What to do if the equipment is already rented out or is in service, and I want to rent it?**

You must report your demand for it. After it is returned to the equipment warehouse, your request can only then be processed by the person responsible for the allocation and rental of equipment.

30. **How to check the location of the rental of a type of equipment, e.g., drills?**

    The location of a specific type of equipment can be checked by reviewing all records in the "Equipment -> Rental Register" section, entering its name in the "Search" field.

31. **Can I rent more than one piece of equipment to an employee at a time?**

    Yes, you can rent several pieces of equipment at the same time by using the "Issue several pieces of equipment at once" button, which is available above the list in the "Equipment -> Rental Register" menu. Just select the names of the equipment from the list for the "Equipment" field and save the form.

32. **Do I have to return all the equipment at the same time?**

    No, you can report extensions for the return dates for each rented piece of equipment, as each of them is recorded in the system as a separate record.

33. **What is the source warehouse and the target warehouse visible during the creation of a warehouse transfer?**

    The source warehouse is defined as the place from which the needed material will be taken, while the target warehouse indicates the place to which the material from the source warehouse will be transported.

34. **How can I check how much material should be available that I want to report for a warehouse transfer?**

    Next to the material name visible on the dropdown list in the "Stock Position" field, the quantity is specified in parentheses, which should be in the source warehouse during the creation of the warehouse transfer.

35. **Can I report the collection of all materials from a project that has ended?**

    Yes, when creating a warehouse transfer, specify the source warehouse with the name of the project from which you want the unused material to be taken. Using the "New" button, add all the visible stock positions from the list in turn, entering the number from the parenthesis in the "Quantity" field.

36. **Why is changing the statuses of warehouse movements important in the system?**

    Changing the statuses of warehouse movements is important in the system because it allows tracking the progress and current state of each goods movement. This ensures better control over the warehouse and transparency in monitoring the history of material movement.

37. **How can I change the status of a warehouse movement in the system?**

    To change the status of a warehouse movement, open the list of entries in the "Warehouse -> Movements" menu and click on the name of the current status at the selected record and make the change to a new status.

38. **What is the difference between the ways of describing the state of the counter, defining "whole" and "part" of equipment usage?**

    "Whole" refers to the full counter state recorded at the time of the equipment return. "Part," on the other hand, is the value corresponding to the difference between the counter state on the day of return and the counter state on the day of its rental, i.e., it specifies the specific unit that was used for the rental period.

39. **Is just submitting a request to defer the return of equipment enough to be able to return the equipment at a later date?**

    No, just submitting an application is not enough to extend the return date. The application must be accepted and only after changing its status to “Approved” will it be possible to return it at a later date.

40. **Why do I have to return the equipment if I have submitted a request for deferral?**

    Most likely, the person responsible for accepting applications has not yet reviewed your application or has not agreed to change the return date.

41. **How will I know that the equipment has not been returned?**

    Exceeding the equipment return date will be marked in red on the “Rental Register” list. Unreturned equipment will always have a “Return” button in the “Return Date” field. You can also add a widget on your dashboard with items requiring return.

42. **How is equipment receipt recorded in the system?**

    Employees responsible for receiving equipment receive information on when and where they should collect the equipment. Depending on the situation, they may bring it back the same day or another. When the equipment returns to the equipment warehouse, only then are they finally relieved of the responsibility for its possession.

43. **The equipment did not return to the target warehouse, how to check who was responsible for its receipt and delivery to the company?**

    Filter the list of records in the “Equipment -> Receipt” menu using the “Received - in delivery to warehouse” option. Information on who and when received the equipment is visible for the selected item.

44. **What to do if after logging into the mobile application on a phone or tablet, in the “Equipment -> Receipt” menu I do not see the “Scan barcode” button?**

    Check the browser settings to see if the “Desktop version” option has been marked. If it is enabled, uncheck it.

45. **What conditions must be met to be able to use the function of reading labels (barcodes) for equipment receipt?**

    The user must be logged into the system on a mobile device (tablet or phone) and have the appropriate program installed that supports scanning codes.

46. **How can I tell that the equipment has not been returned from service?**

    Simply apply a filter on the “Equipment -> Warehouse” list with variables “Expected return date has already passed” or “Equipment in service”.

47. **How to account for the use of warehouse material that was used for service repair?**

    In the equipment return form from service, for the field “Material from our warehouse was used for service” select the material from the list and specify its quantity using the “New” button. The used material will be recorded as an expenditure.

48. **How can I change the quantities of materials on the inventory list that were generated automatically by the system?**

    There is an edit button next to each material - use it to modify the quantity in stock.

Projects

Entering project information into the system before estimation improves management efficiency. The planning process is like writing down plans before setting out on a journey - it helps to know what needs to be done and how to develop. The available project statuses are simply the stages we go through, from the start to the completion of a work phase. They indicate where we currently are and what will come next.

Creating a New Project

Any type of orders (projects) can be entered into the system, which will be awaiting estimation creation in the system.

The records in the “Contracts → Projects” menu may include:

- Previously offered estimates.
- New projects for which no prior offering was made.

> **NOTE:** Estimation is only available for projects from the status “We have been chosen to execute the project” and above.

> **REMEMBER:** Acquired projects are estimates approved by the Client, for which cooperation has been confirmed and a contract for execution has been signed.

To enter an order into the project list, follow the sequence:

1. Go to the “Contracts → Projects” menu and create an entry using the “New” button.
2. Fill in the form fields in the “General” tab, whose meanings are as follows:

- **Generate offer number:** You can choose the next offer number by selecting the “Yes” option or enter any number in the “Offer number” field after selecting the “No” option.
- **Project name:** The name for the project being created, e.g., “Zacisze Sports Hall”.
- **Client type:** Specify the entity the project is to concern, e.g., “Commercial” for a company or “Private” for an individual, and select the appropriate Contact or company from the list if it exists in the system.
- **Contact:** Optionally specify a contact person for this order. This is not a mandatory field.

> **REMEMBER:** You can select a company Contact from the list available in the system by entering the initial letters of its name.

> **NOTE:** Using the “Quickly add company” button, you can enter a new entity into the system without having to close the currently filled form.

> **REMEMBER:** For a company selected from the system list, related contacts will be suggested. You can also create a new Contact that will not be associated with the selected company. If you add a new company, the contact list will not be available.

> **NOTE:** By using the “Quickly add contact” button, you can enter a new entity into the system without having to close the currently filled-out form.

- **Type of project**: Select from the list the type of work the order is related to.

> **REMEMBER:** The types of projects are determined by the **administrator**. If your project includes other types of work than those available on the list, contact the administrator to update the list.

- **Source of inquiry:** Select from the list the way the potential Client requested a project quote:
  - **Website** – contact through the contact form on the website.
  - **Social media** – contact through social media platforms such as Facebook, Instagram, LinkedIn.
  - **By recommendation** – contact obtained through a recommendation from another person or company.
  - **Advertisements** – contact after seeing an advertisement, e.g., in Google Ads, press, on a billboard, etc.

> **REMEMBER:** The types of inquiry sources are determined by the **administrator**. If your project includes other types of sources than those available on the list, contact the administrator to update the list.

> **REMEMBER:** Recording the sources of inquiry for quotes helps determine which methods are most frequently chosen by Clients when submitting inquiries. The obtained data assists in further directing advertising activities and selecting appropriate communication channels to increase effectiveness.

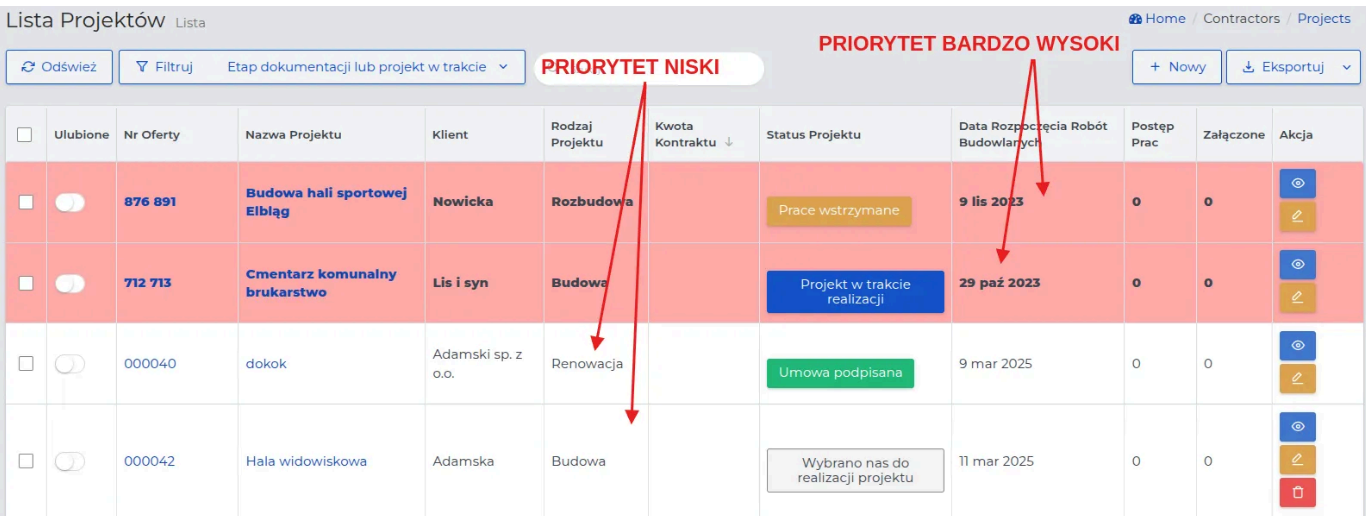
- **Sales representative:** Select from the list the employee who acquired the project and for whom an activity report will be generated.

- **Estimator:** Select from the list the entity responsible for creating the estimate.

NOTE: If default field values for the above-mentioned groups provided in the project have been selected in the system settings, these fields will be filled in automatically. You can change them by selecting another person from the list assigned to the appropriate group.

- **Project manager:** Select from the list the entity responsible for overseeing the construction.
- **Assistant project manager, Architect, Constructor:** Select from the list the entity responsible for supporting the project manager, designing, and supervising the construction implementation, considering its safety and compliance with regulations.
- **Legal support:** Choose from the list the entity responsible for providing legal advice and ensuring compliance with applicable laws.
- **Project address 1 and 2, City, Country, Region, Postal code:** Address fields specifying the location of the project execution.
- **Construction start date:** The date when work is scheduled to begin.
- **Estimated construction end date:** The planned completion date for the work specified in the project.
- **Priority:** Determine the importance of the order by selecting one of the available options from the list: Low, Medium, High, Very High.

NOTE: Depending on the selected priority, the record will be highlighted with a background color on the list with the appropriate intensity of its hue. Low priority will not have a highlight, while very high priority will be marked the most. Medium and high priorities will have intermediate colors.

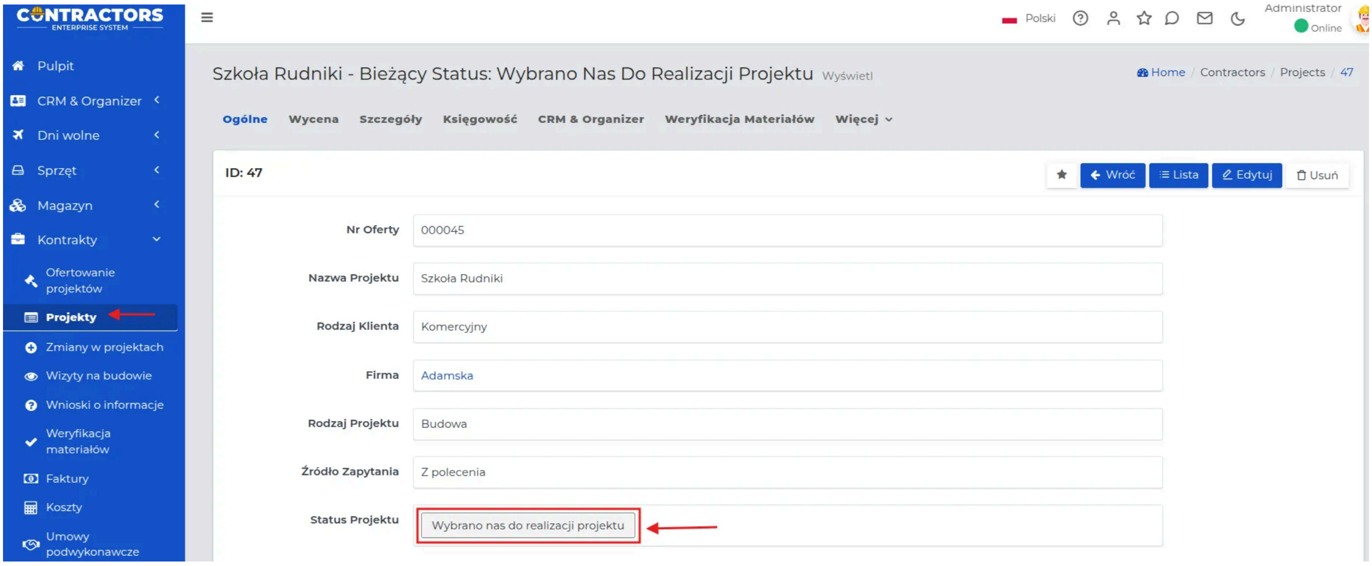


- **Description:** Additional information, notes related to the project.

4. Save the completed data using the "Confirm" button.

The created entry will be displayed on the screen.

REMEMBER: Each project added directly to the project list automatically receives the status “We have been selected to execute the project.”

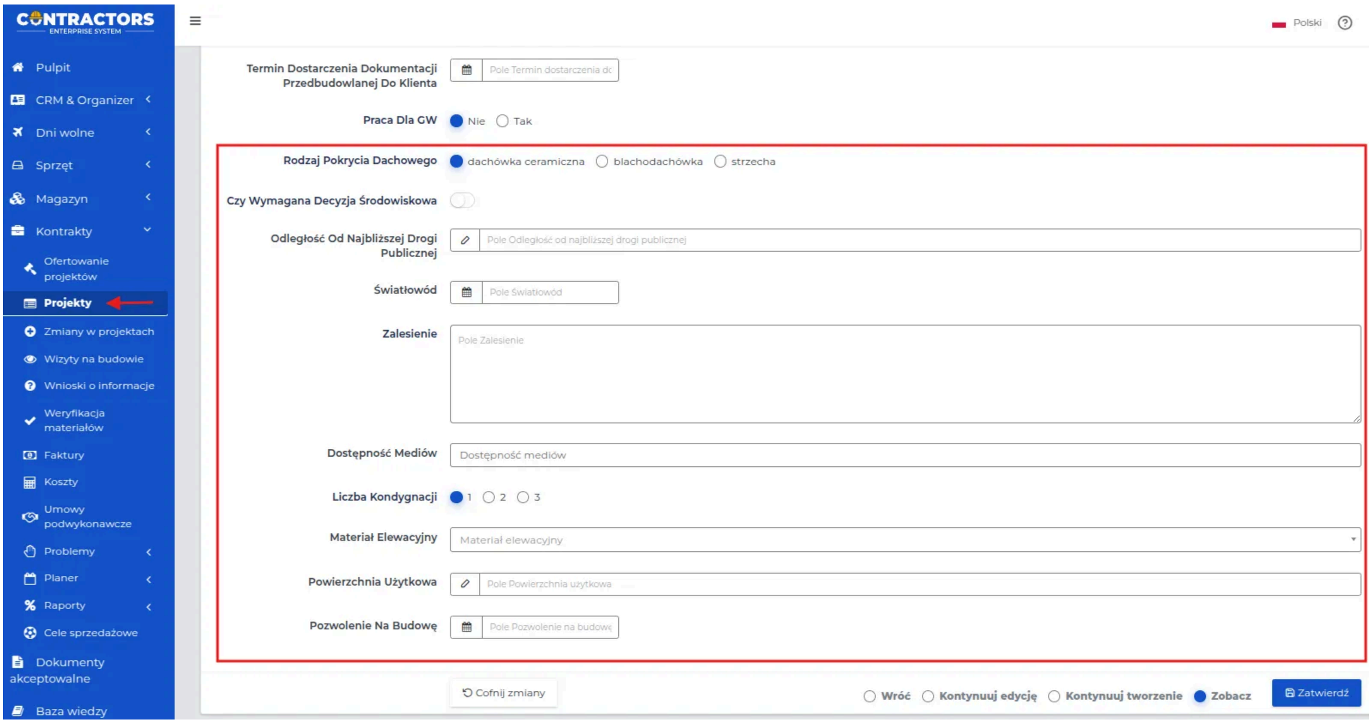


5. Optionally, go to the “Details” tab and fill in the remaining visible fields, which concern:

- **Plans**: You can attach the required documentation files related to the created estimate.
- **Deadline for delivering pre-construction documentation to the client:** Enter the date for handing over the documentation to the investor.
- **Work for the General Contractor (GW):** Assess the connection with the General Contractor, where the choice concerns:
  - Option **“No”** - The General Contractor will not mediate in the created project.
  - Option **“Yes”** - The General Contractor acts as an intermediary and takes over the full scope of work on the project, while we act only as a subcontractor.

  For the choice of option **“Yes”**, further specify the stages of agreements with the General Contractor, which relate to:
- **General Contractor Project Number:** Sequential number assigned to the project by the GC.
- **Estimator, Manager, Inspector:** Select individuals from the appropriate groups who will be responsible for the mentioned functions.

NOTE: If the administrator has added “Additional project fields,” they will be available for completion in the later part of the form. Not all of them need to be mandatory.



REMEMBER: Additional fields are available in the “Details” tab only for projects with a minimum status of “We have been selected to execute the project” and for further statuses, provided the administrator has included them in the system settings.

Employees fill in additional fields to ensure data completeness, facilitate project management, and improve work organization.

The method of completing additional fields may include:

- Any text (short or multiline).
- Integer and fractional number (e.g., 0.2).
- Setting the activity slider to choose Yes/No.
- Selecting a date and time from the calendar.
- Choosing one or several options from a dropdown list.
- Marking single or multiple choice options.

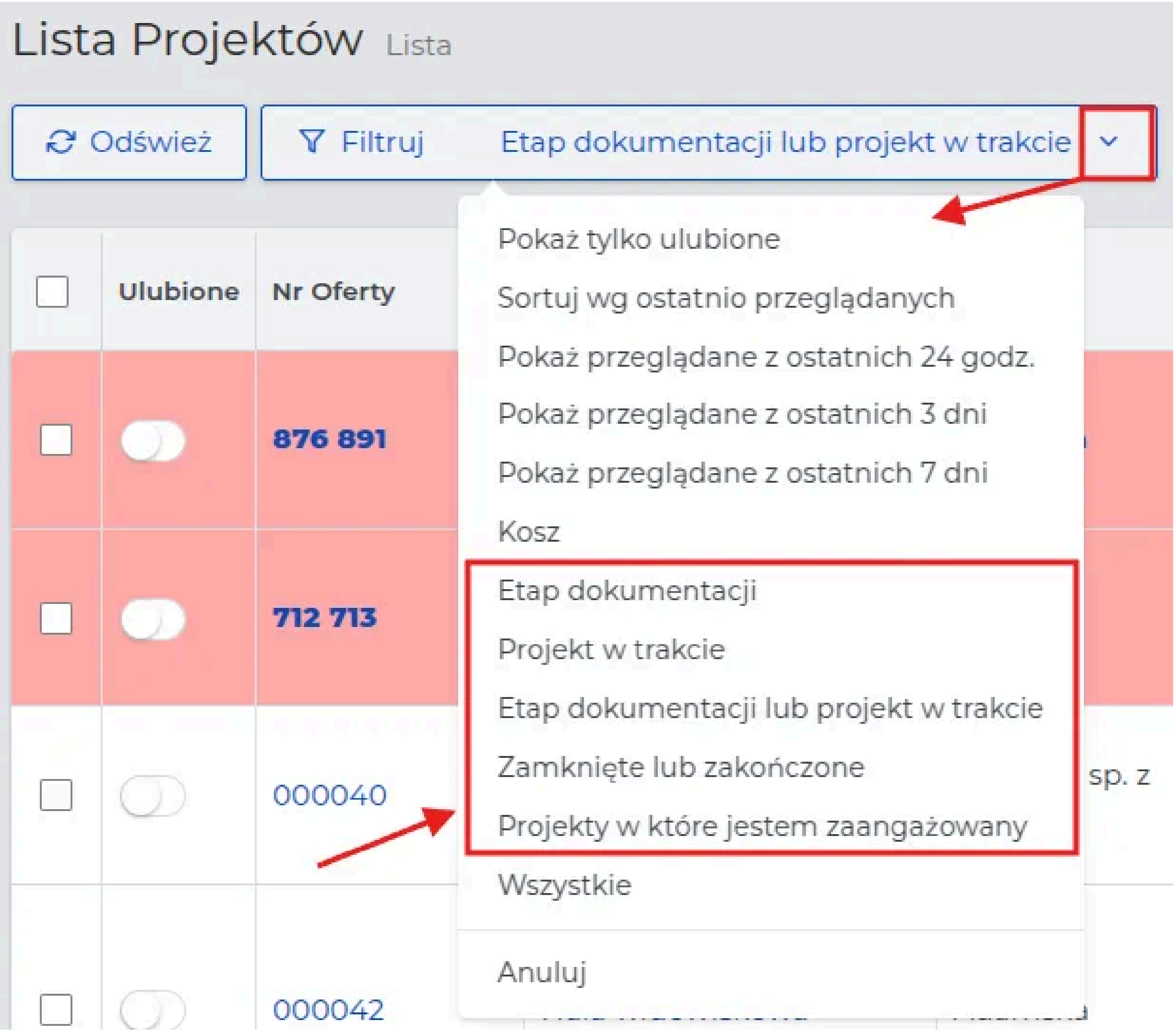
REMEMBER: The “Detailed Filtering” function allows for easy searching of records that have common additional fields.

6. Save the entered data using the “Confirm” button.

NOTE: Leave the remaining fields and the “Estimation” and “Accounting” tabs empty. These modules will be described in detail in the **Estimations** section.

Preview and edit entered projects

Regardless of the set status, you can make changes to all projects listed. To find a specific project, it is worth using the filtering and sorting methods of records, which are described in more detail here. The quick filtering option of the list, based on the current status of projects, may prove helpful. It is marked in the screenshot below.



Possible quick filters:

I. Documentation stage: Projects where the necessary documentation for the execution of specific work stages is being completed. Applies to statuses: “We have been selected for the project” and “Contract signed.”

II: Project in progress: Projects currently being executed. Applies to statuses: “Project in progress,” “Work suspended,” and “Project issue.”

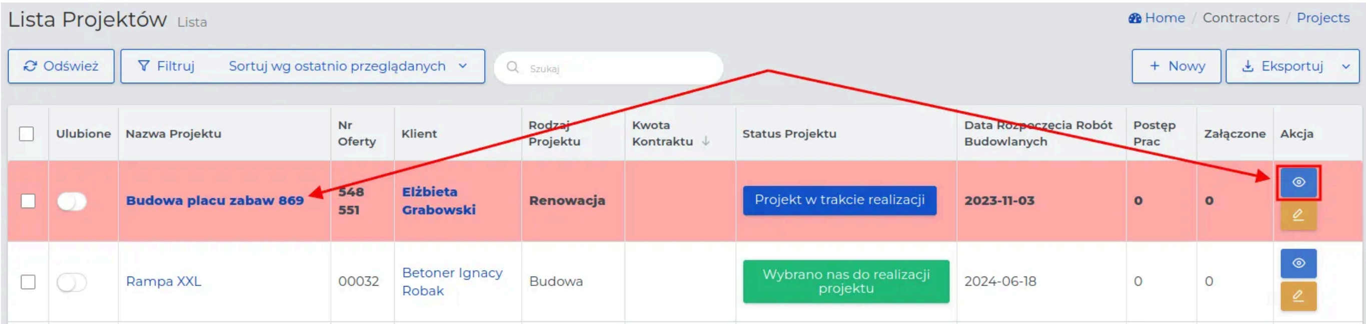
III: Documentation stage or project in progress: List of projects including both types of filters: I and II.

IV: Closed or completed: Inactive projects, including those completed and settled, for which the status can be changed to "Closed."

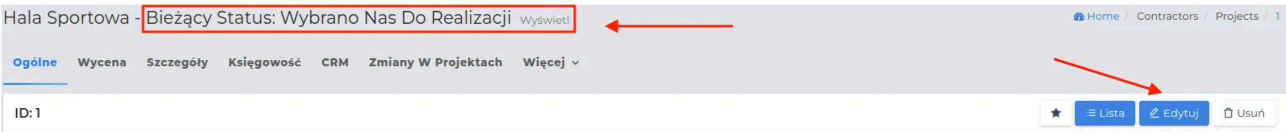
V: Projects I am involved in: All projects in which the logged-in user participates.

To view the entered project and make changes to it, follow the sequence:

1. Go to the "Contracts → Projects" menu and click the action button "View" or its name for the selected project.



2. Depending on the status of the project entered into the system, the fields in the individual tabs may slightly differ.

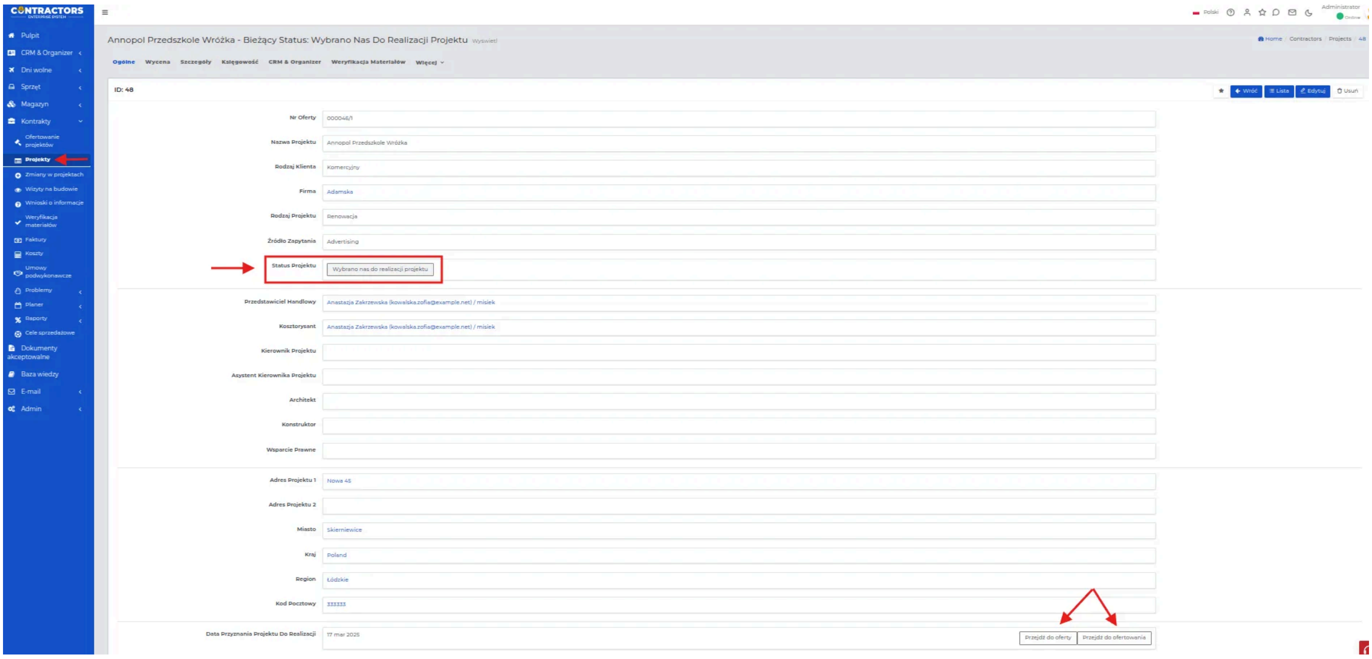


3. Click the "Edit" button and make changes in the selected tabs, then save the forms using the "Approve" button.

REMEMBER: Editing some tabs in projects is only available to users with appropriate permissions, e.g., the "Estimation" tab.

Example: Tabs available in a project with the status "We have been selected for the project."

- **General:** Information visible when entering the entry into the system.



> **NOTE:** In records with the status “We have been selected for the project,” you can view the existing offer by clicking “Go to offer,” or create a new one using the “Go to bidding” option.

- **Estimation:** Estimated data available only for the active “Time and Material” field.

> **NOTE:** Changing the status to “In estimation” will allow changes to be made for the “Time and Material” field.

- **Details:** Includes settings related to the connection with the General Contractor.
- **CRM & Organizer:** All attached “Tasks,” “Meetings,” and “Phone Calls” that are linked to the currently viewed project.
- **Material Verification, Requests for Information, Project Visits:** A place for appropriately attached requests depending on their purpose.

> **NOTE:** Changing the status to “Under Evaluation” will allow the submission of “Material Verification” requests.

- **More:** Additional links for this project, visible in the tabs:
    - **Attached** (Notes and files, Emails, and Acceptable Documents).
    - **Information** (author and date of record creation).
    - **History** (who and when changes were made to the project record).

> **NOTE:** Only users with administrator privileges can restore deleted projects from the list.

REMEMBER: Each subsequent status selected after the status “Invitation to Bid Received” will have an appropriately increased number of tabs.

Example: The list of tabs visible after expanding “More” in the currently ongoing project.

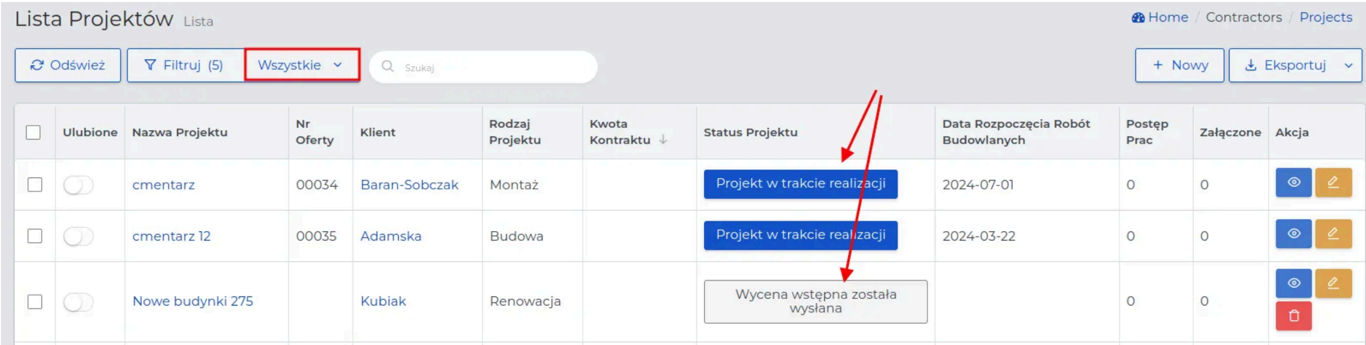
- **Invoices:** List of records related to the financial settlement for the project.
- **Costs:** Records specifying the costs associated with the project implementation.
- **Material Verification:** List of submissions regarding the verification of materials marked in the evaluation.
- **Requests for Information:** List of requests for information on questions arising during the project.
- **Planner:** Work schedule of employees assigned to the project. It is filled out by the project manager and updated based on the registration of construction workers in the mobile app.
- **Subcontractor Agreements:** Settlement with the subcontractor for the implementation of the project stage.
- **Project Visits:** List of records with conducted visits to the project.
- **Accuracy of Estimation and Work Progress:** Analysis of project profitability based on daily reports submitted by foremen, containing the progress of work delegated to project employees.
- **Issues:** Reported issues that may affect the smooth progress of work.
- **Equipment:** History of equipment loaned for the duration of the project and access to lists with extend requests, pickups, and reported equipment needs.
- **Warehouse:** List of warehouse materials present in the project and those that have been used for project implementation.
- **Reports:** View of work progress based on reports and the balance of employee working hours and financial balance based on recorded costs (employee, material, equipment, and other costs) and valuation.

Changing Statuses in Projects

Changing statuses in projects allows for the introduction of correlations between the stages of their implementation. Depending on the data entered into the system, appropriate tabs may appear or disappear in the view of a given project.

You can change the status in a project according to the following scheme:

1. Find the project in which you want to change the status on the project list and click on its current status name with the cursor.



NOTE: Certain statuses cannot be skipped - status changes always occur in a manner forced by the subsequent stages of the project.

2. Select the new status and save it using the “Confirm” button.
3. Review the visible form, fill in the appropriate fields according to the changes you want to make, and then save them by clicking the “Confirm” button.

REMEMBER: Before preparing a contract, always create a valuation first.

Examples of “Intermediate Statuses” available for offered projects with the status “We have been chosen to implement the project” and for newly added ones without prior offering:

1. We have been chosen to implement the project - time and material.
2. Project lost.
3. Contract prepared.
4. Contract signed.
5. Pre-construction documentation awaiting preparation.
6. Pre-construction documentation in progress.
7. Pre-construction documentation completed.
8. Pre-construction documentation verified.
9. Pre-construction documentation sent to the client.
10. Pre-construction documentation approved by the client.
11. Project in progress.
12. Project has been canceled.

13. Work suspended.

14. Project issue.

15. Completed.

16. Closed.

A detailed description of each of the above statuses can be found in the **Estimation** section.

> **REMEMBER:** Before changing any status, verify the data in the previously entered form.

> **NOTE:** When closing a project, create a warehouse transfer for all unused materials. Unsettled goods left on the project will be included in the project costs.

> **REMEMBER:** A completed project is one for which a final invoice has been issued. A closed project is a completed and settled project.

Project Bidding

Bidding is the first step – a general proposal for cooperation, which may or may not include a specific estimate. If the investor is interested in further discussions, a **proposal** is prepared, which is a detailed document containing the scope of work, prices, and terms of execution. Only after its acceptance does the **project** begin, which is the actual execution of the task according to the agreed schedule and technical documentation.

Creating a New Bid

Creating a project proposal is an intermediate stage where potential changes are determined before signing the contract for execution. These are not yet acquired projects.

To create a project bid, follow these steps:

1. Go to "Contracts -> Project Offers" and create an entry using the "New" button.

2. The project proposal creation form contains the same fields as the project creation form. The differences concern the following fields:

- **Bidding Status:** Specify the stage from the available options for the project being entered:
    - **Preliminary Planning** - an entry concerning the general outline of a project for which we are not yet conducting a detailed estimate.

- **Received Invitation to Bid** - an entry concerning a project that has been presented by a potential client. For this choice, you must specify the "Date of Invitation Receipt" below.

- **During the estimation process** - an entry related to a project for which the estimation process has begun.
- **We are not interested** - an entry related to the decision not to create an estimate.
- **Date of receiving the invitation:** The day the request for a preliminary estimate was received. In the following fields, you can specify the deadline for submitting the estimate and the final offer.

> **NOTE:** For the statuses "Received an invitation to submit an offer" and "During the estimation process," you must provide the offer submission deadline. The deadline is not required for the status "Preliminary planning."

> **REMEMBER:** Project bidding is only a general plan for potential cooperation with the Client. Until its status is changed to "We have been chosen for implementation," it remains on the list of offers.

3. Save the completed data using the "Confirm" button.

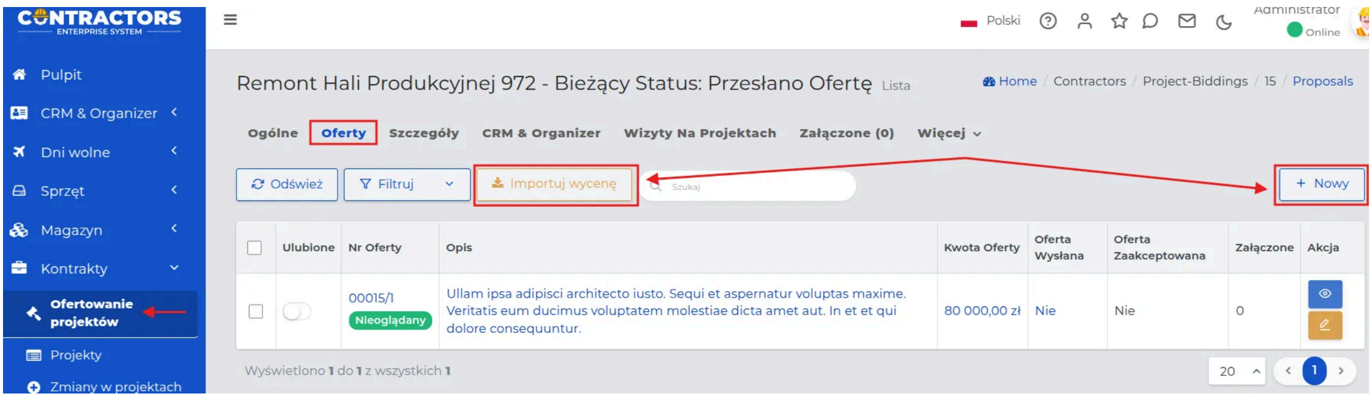
> **NOTE:** If the administrator has added "Additional project fields," they will be available for completion in the "Details" tab. Not all of them have to be mandatory.

Adding multiple offers to one project

Regardless of the current status of the project, you can add several project offers to it. This way, you can easily find the estimate accepted by the Client.

To add additional project offers to one project, follow these steps:

1. In the "Contracts -> Project Bidding" menu list, click on the offer number regardless of its current status.
2. Go to the "Offers" tab and click "New" to add an offer, or "Import estimate" if you have the appropriate permissions in the system.



3. Fill in the fields and save the entry creation form with the "Confirm" button.

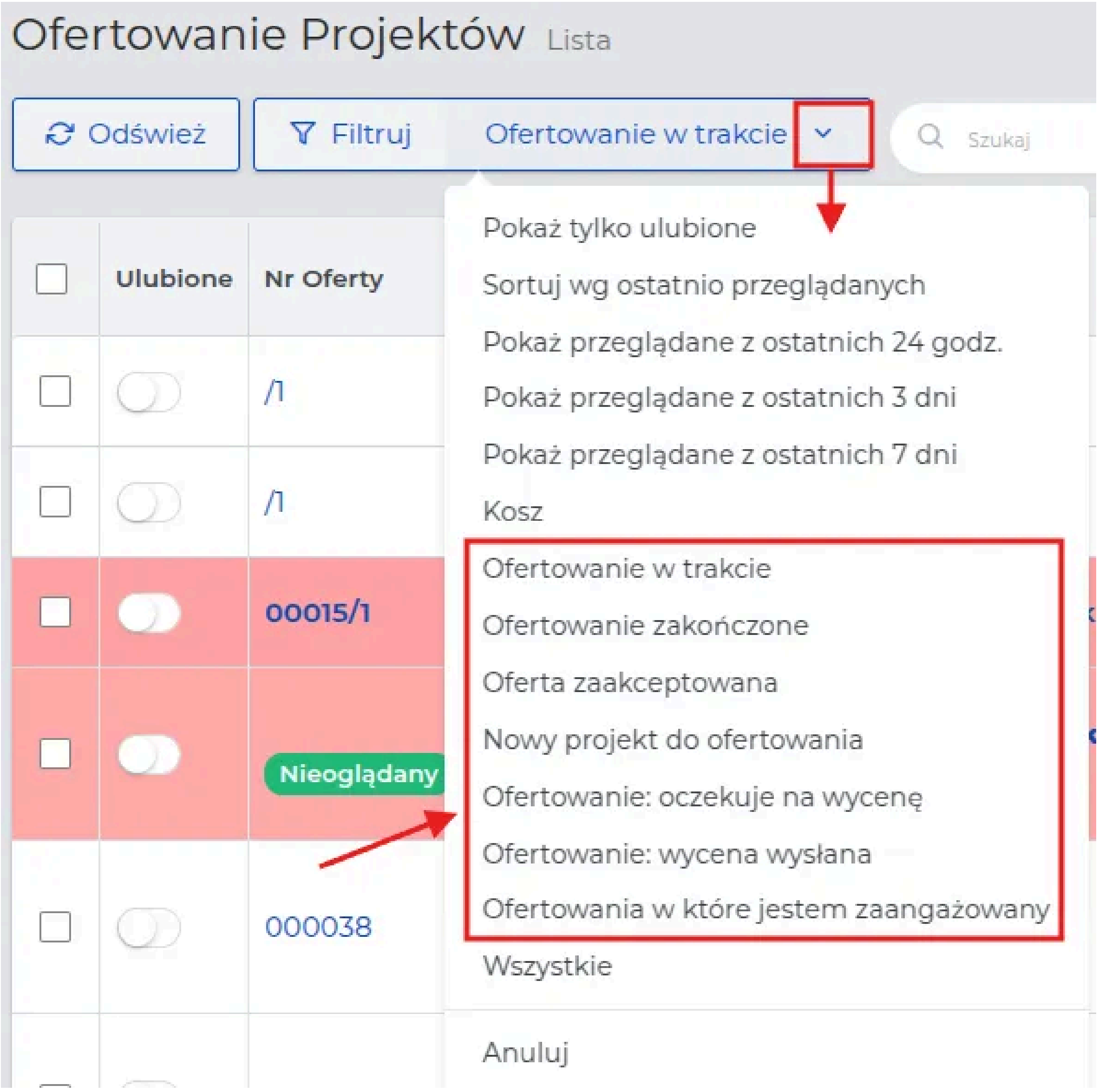
4. The number of added offers will be visible next to the project name on the list.

5. In the record preview with multiple project offers, you will see the current statuses of the offers, including their sending and acceptance dates.

Preview and Edit Entered Offers

You can edit all projects and offers on the list. To quickly find a specific entry, use filtering or sorting.

For offered projects, the list will look as follows.



Possible quick filters:

I. Bidding in Progress: Records with potential projects for which offer creation has begun. Applies to the statuses "Offer Sent" and "Preparing Offer."

II. Bidding Completed: Rejected or discontinued offers.

III. Offer Accepted: Projects under negotiation for which offers have been sent and accepted. Applies to the statuses "Selected for Project Execution" and "Selected for Project Execution - Time and Material."

IV. New Project for Bidding: Potential offers for which a preliminary estimate may be prepared in the future.

V. Bidding (awaiting estimate, estimate sent): Project offers for which a preliminary estimate has been sent, and those that require changes.

VI. Biddings I am Involved In: All project offers related to the logged-in user.

To view or edit an entry on the offer list, use the "View" or "Edit" buttons.

> **Example:** Tabs available in a project offer with the status "Preparing Offer."

- **General:** Information visible when entering the entry into the system.
- **Offers:** Available offer proposals.
- **Details:** Optionally attached construction plans.
- **CRM & Organizer:** All attached "Tasks," "Meetings," and "Phone Calls" related to the currently viewed offer.
- **Project Visits:** Annotations regarding the spatial verification of the offer.
- **More:** Additional associations for this project, visible in the tabs:
    - **Attached** (Notes and files, Emails, and Acceptable Documents).
    - **Information** (author and date of record creation).
    - **History** (who and when made changes to the project record).

> **NOTE:** Only administrators can restore deleted project offers from the list.

> **REMEMBER:** The number of tabs during the bidding stage is fixed. It only changes after the offer is accepted and a detailed estimate is created.

Changing Statuses in the Project Offer

Changing the status in the project offer proceeds the same way as for selected projects. Simply go to "Contracts → Project Bidding" and follow the same steps.

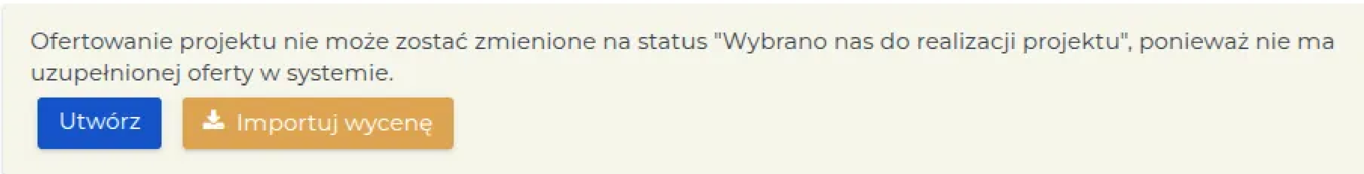
Examples of available "Main Statuses," defining key stages of project bidding:

1. Preliminary planning.
2. Invitation to submit an offer received.
3. In the process of preliminary estimation.
4. We are not interested.

> **NOTE:** For the statuses "Invitation to submit an offer received" and "In the process of preliminary estimation," you must provide the offer submission deadline. The deadline is not required for the "Preliminary planning" status.

> **REMEMBER:** When changing the status, it may be necessary to select from a list the entity responsible for continuing the bidding, such as: Estimator, Employee, Project Manager, Project Manager Assistant, or Foreman.

> **NOTE:** Project bidding cannot be changed to the status “We have been selected to execute the project” before adding an estimate.



Examples of available “Intermediate Statuses,” referring to special situations or issues that may arise during project bidding:

1. In the process of preliminary estimation.
2. Preliminary estimate has been sent.
3. Offer preparation.
4. Offer sent.
5. Offer accepted.
6. Paused at the bidding stage.
7. Project lost.
8. We are not interested.
9. We have been selected to execute the project - time and material.

> **REMEMBER:** After setting the status “We have been selected to execute the project – time and material,” the offer is moved to the list of active projects.

> **NOTE:** The last status change for any project offer causes a change in the status of the entire project.

> **REMEMBER:** When you change the bidding status, add a short explanation – e.g., email, plans, note, or documentation. This will help track progress and maintain order.

It seems like your message is empty. Please provide the Markdown content you would like translated, and I’ll assist you with the translation.

Estimation

Project estimation is simply an assessment of how much it will cost the client to complete the project from A to Z. The estimation takes into account:

- material costs,
- employee work time billing,
- purchase or rental of specialized equipment,
- additional costs incurred during implementation.

Each prepared estimate presented to a potential client specifies the estimated amount they will have to bear for the project execution. The estimate defines the budget and work scopes according to which its individual stages will be carried out step by step.

> **REMEMBER:** The way you perform the estimation affects how accurately the project cost is assessed, as well as its profitability and effectiveness in execution.

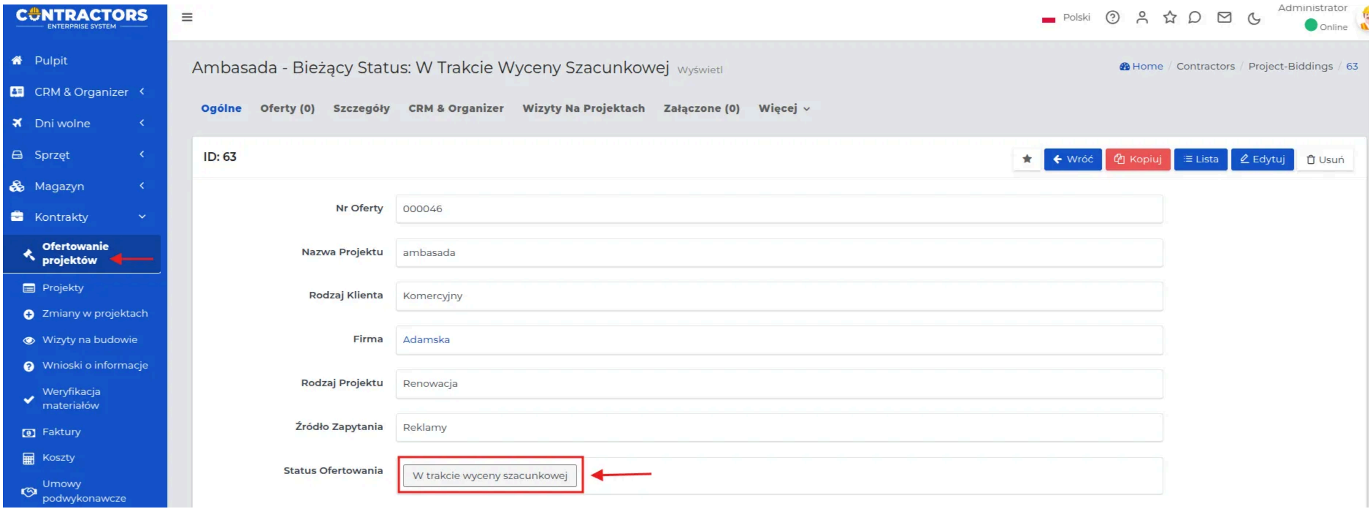
> **NOTE:** Estimates entered into the system cannot be deleted if the project status has been marked as “Project in progress” or any subsequent status.

Creating a project estimate

A project estimate can be made at the bidding stage or by adding a new record to the project list.

Creating an estimate at the bidding stage.

1. In the “Contracts → Project Bidding” menu, find the selected offer, set its status to “In preliminary estimation” and open the preview by clicking “View”.
2. Click the current bidding status, as shown in the screenshot below.



3. Select the “Create” button and fill out the form, where the individual fields have the following meanings:

- **Description:** A short, optional piece of information regarding the estimate.

- **Scope of work:** Select the types of work covered by the estimate.

REMEMBER: You can add additional “Scopes of work” and “Additional materials” with the “New” button or remove them by selecting “Delete”.

REMEMBER: Values for work scopes are automatically generated by the system according to the **administrator** settings, creating the so-called “Service Price List”. If you click the mouse cursor in the selected field and it becomes active, you will be able to edit the visible value.

NOTE: The service pricing may include the “Time and Material” model, where the following options are available:

- **“No”** - The project estimate includes a calculation of individual work scopes, where the service value has been calculated individually or based on the rate per unit (m2) or hour of work multiplied by the number of working days or the number of units to be completed. This pricing method may also include the quantity and value of materials needed to perform the service order (Additional materials).

- **“Yes”** - applies to situations where the service is to be settled solely on the basis of an agreed hourly rate and billed according to the hours worked by employees. Materials are provided by the investor or are re-invoiced according to consumption.

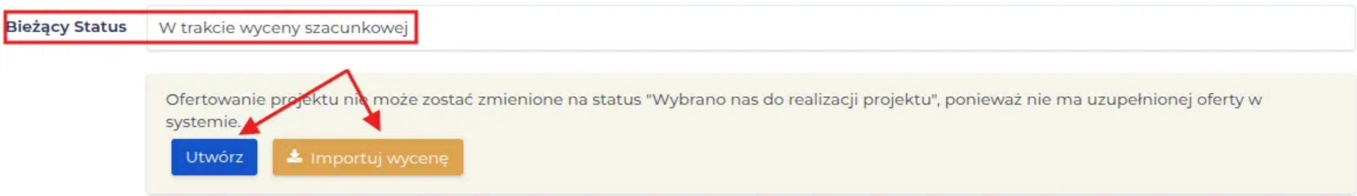
- **Additional materials:** Type of goods needed to complete the project. Specify whether the material is to be used from the warehouse or not and provide its quantity.

REMEMBER: The system will automatically fill in the material prices based on their last purchase, but you can edit them.

NOTE: If the price per unit of material used from the warehouse is to be higher by a margin set for all types of materials, enter its percentage value in the “Markup” field. This way, even with changes in purchase prices, the estimate will have a safe reserve for the used material.

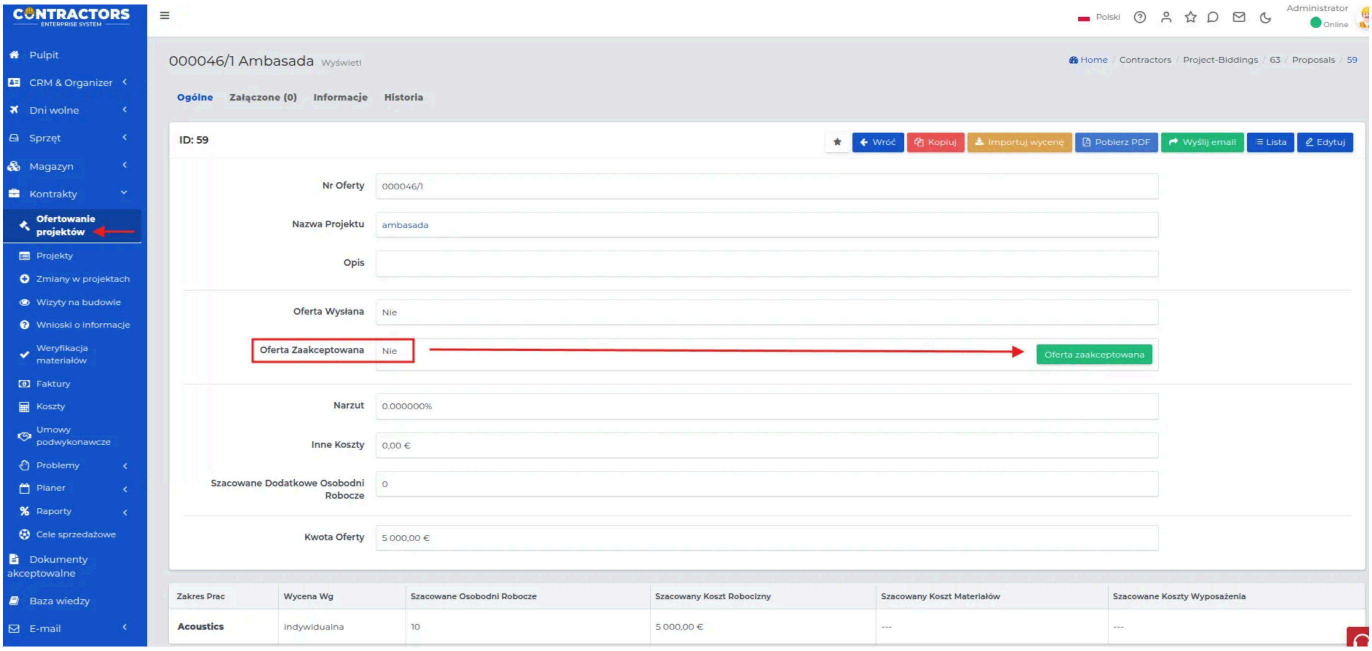
- **Other costs:** Additional costs necessary for the project implementation, e.g., extracts of geodetic maps from the office, insurance, or appropriate permits.
- **Estimated additional man-days:** Optionally specify the additional number of working days necessary to complete the project.
- **Summary:** Total value of the estimate based on the entered data.
- **Offer amount:** The value for the created estimate to be presented to the client.
- **Offer sent:** Optionally provide the date the offer was sent.

NOTE: You can import a ready estimate from an external program, e.g., Norma PRO (ATH), using the “Import estimate” button.



4. Save the form with the “Submit” button.

NOTE: When the client accepts the offer, change its status to “Offer Accepted”. From this moment, it will also be visible on the list of acquired projects.



Creating a quote on the project list.

1. In the "Contracts → Projects" menu, find:
   - a project with the status "We were chosen to execute the project" if there is no quote yet,
   - a project with an existing quote for editing, as long as its status is not later than "Project in progress".

> **REMEMBER:** In ongoing projects, you cannot edit an existing quote. You can only add a new one, which the client must accept.

2. Go to edit the project using the "Edit" action button.

3. Select the "Quote" tab and fill in the fields:

- **Time and material:** Service billing model based on hourly rate or material costs.
  - Selecting the option **"No"** - Quote based on the calculation of work scopes, considering individual rates or units (m^2, hours) and material costs.
  - Selecting the option **"Yes"** - Billing according to the hourly rate, based on the time worked. Materials are provided by the investor or are re-invoiced.
- **Scope of work:** Choose the types of work covered by the quote.
- **Additional materials:** Indicate the type of goods needed for the project execution. Specify whether the material comes from the warehouse and provide its quantity.

> **REMEMBER:** The system fills in material prices based on the last purchase, but you can edit them.

NOTE: If you want to add a margin to the material price, enter its percentage value in the “Markup” field. This way, the quote will include a reserve even with changes in purchase prices.

REMEMBER: You can add more “Scopes of work” and “Additional materials” with the “New” button or remove them by clicking “Delete”.

REMEMBER: Values for work scopes are generated automatically according to the **administrator** settings in the “Service Price List”. If the field is active, you can edit its value.

- **Other costs:** Additional expenses related to the project execution, e.g., geodetic maps, insurance, permits.

- **Estimated additional person-days:** Optional number of additional workdays needed to complete the project.

Example: If, for instance, the project requires 10 days of work by two people, the total number of person-days is **20 workdays** (10 days × 2 workers).

- **Summary:** The total estimated value calculated based on the entered data.

- **Contract amount:** The total value of the agreement, including agreed costs for project execution, such as services, materials, and other expenses, accepted by both parties to the contract.

NOTE: The “Contract amount” is visible only to users with appropriate permissions in the system. By default, only the Administrator, Manager, Project Manager, Estimator, and Accountant can see the contract value.

- **Number of hours in a workday for this project:** The specified number of work hours in a day, adopted for the execution of the given project.

4. Save the data using the “Confirm” button.

5. Go to the next tab “Details” and fill in the fields:

- **Plans:** You can attach documents and technical drawings related to the project.

- **Deadline for delivering pre-construction documentation to the client:** The date for handing over the required documents to the client before starting construction work.

6. Verify the entered data and save it using the “Confirm” button.

NOTE: If the scope of work changes from the estimate to the signing of the contract, it should be updated when changing the status to “Selected for execution.” The scope of work is later used in project planning.

REMEMBER: The “Accounting” tab, used for project settlement, is visible only to users with appropriate permissions.

Example: An estimate for replacing the roof truss with the installation of 4 skylights, without insulating and finishing the attic. The service execution includes the purchase of materials and labor costs.

1. In the “Contracts → Projects” menu, we enter the project.

2. In the “Estimate” tab, we set the “Time and material” field to “No,” because the estimate includes the full service along with materials.

3. We select “Scope of Work”:

   I. Roof

- **Hourly rate:** 200.00 PLN.

- **Estimated man-days:** 6.

  We assume that replacing the roof will take 48 hours. With an 8-hour workday, this gives 6 estimated man-days.

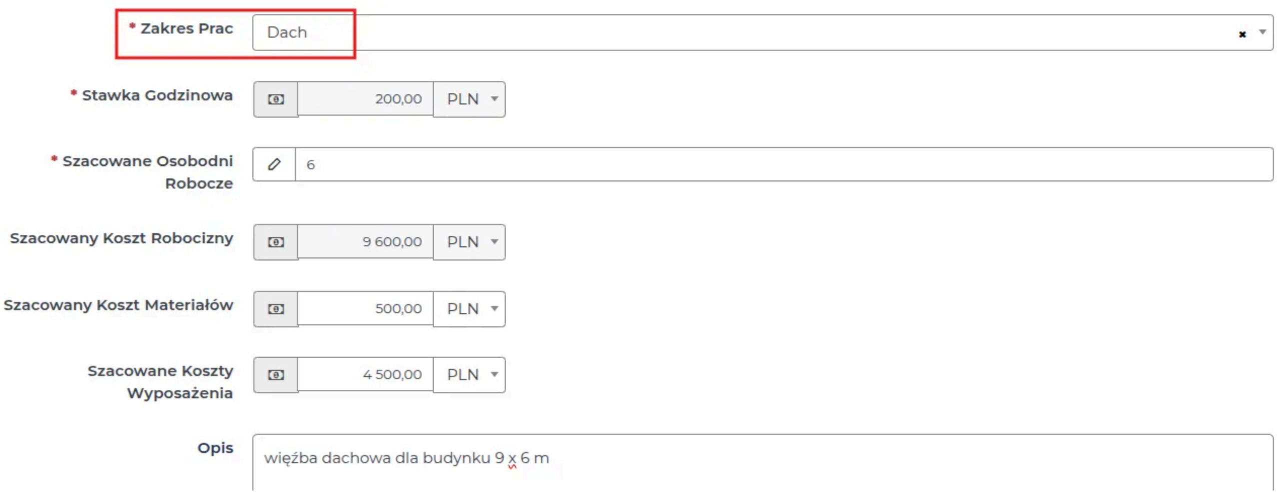
- **Estimated labor cost:** Hourly rate × number of hours

  48 hours × 200 PLN = 9600 PLN

- **Estimated cost of materials and equipment:** Costs of necessary materials and tools.

  We assume 500.00 PLN for material costs and 4,500.00 PLN for crane rental.

- **Description:** Short supplementary information.



   II. Installation of windows and external doors

- **Rate per unit:** 150.00 PLN

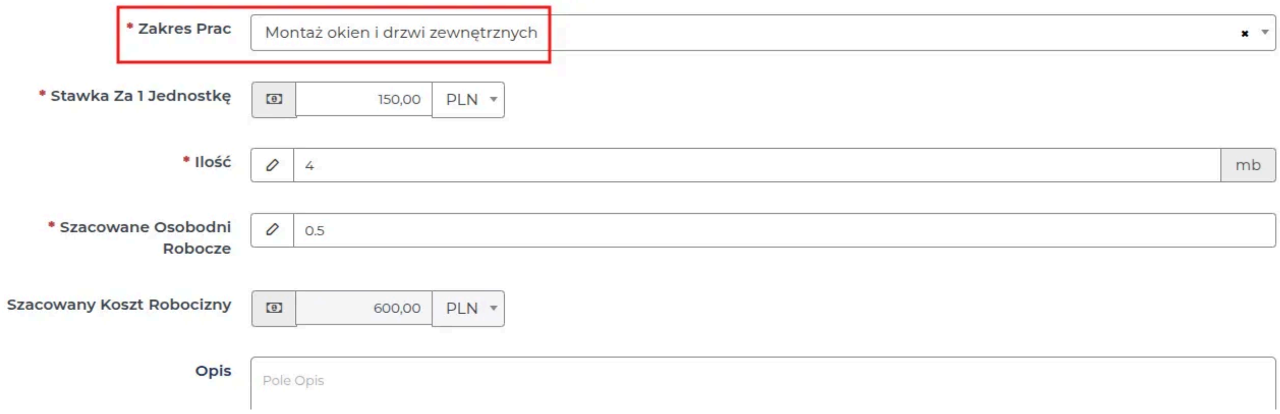
- **Quantity:** 4
- **Estimated man-days:** 0.5

  We assume that replacing the windows will take 4 hours. With an 8-hour workday, this gives 0.5 estimated man-days.

- **Estimated labor cost:** Hourly rate × number of hours

  4 x 150.00 PLN = 600.00 PLN

- **Description:** Short supplementary information.



4. We add “Additional materials”
   - Materials from the warehouse: **No**

- **Mounting foam:** 6 packages at 40 PLN each. Total **240.00 PLN.**
- **Wooden rafters:** 120 pieces at 60 PLN each. Total **7200.00 PLN.**
- **Mounting accessories**: 500 pieces at 3.00 PLN each. Total **1500.00 PLN.**
- **Roof window:** 4 pieces at 1500.00 PLN each. Total **6000.00 PLN.**

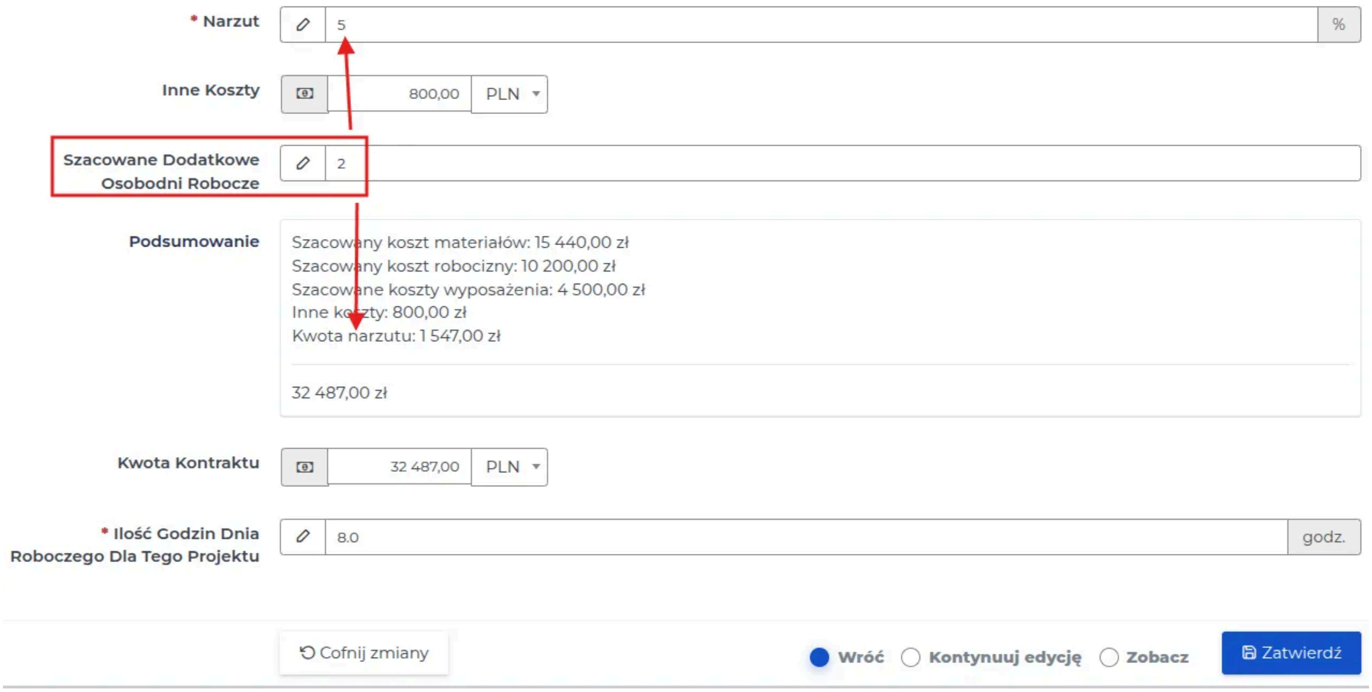
5. In the next section, we fill in sequentially:

- **Markup:** 5%.

The value by which the total cost of the estimate is increased, visible in the “Summary” field.

- **Other costs:** 800.00 PLN (Health and Safety)
- **Contract amount:** The value of the remuneration for the service agreed with the client - the field should be filled in after negotiations with the client and signing the contract.
- **Number of working hours per day for this project:** We assume an 8-hour workday, according to the administrator’s settings.

REMEMBER: Entering additional days in the “Estimated additional man-days” field will not affect the remuneration value in the estimate, but will inform the client about a possible extension of the work deadline. It is worth using the “Markup” field, which allows an optional increase to cover the costs of hiring workers.



NOTE: The system automatically calculates the “Contract Amount” based on all components. You can round it, but then the system will optionally adjust the percentage value in the “Markup” field.

REMEMBER: If you, as an **administrator**, change the rates in the scope of work settings after generating the estimate, the system will not take the new rates into account - the rates are saved in the project at the time of making the estimate.

NOTE: Interrupting the process of creating an estimate without saving the form will result in the loss of current data.

PDF Format Estimate

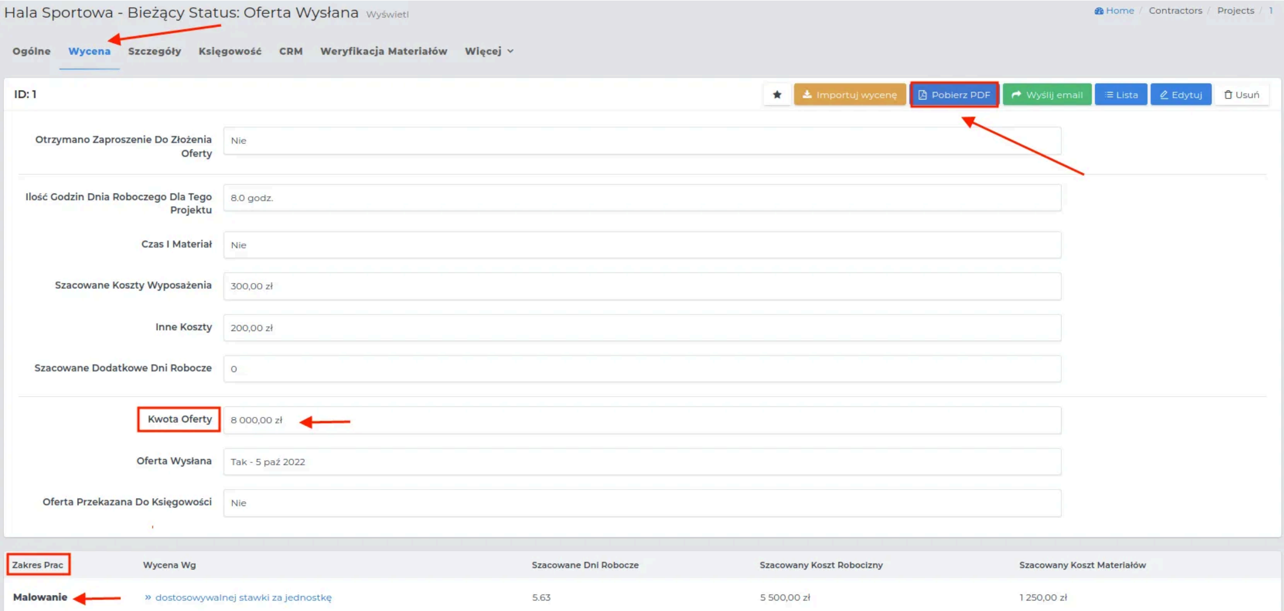
The system allows generating an estimate in PDF format, which can be directly sent to a potential client via email.

To prepare and save the estimate in PDF format, follow these steps:

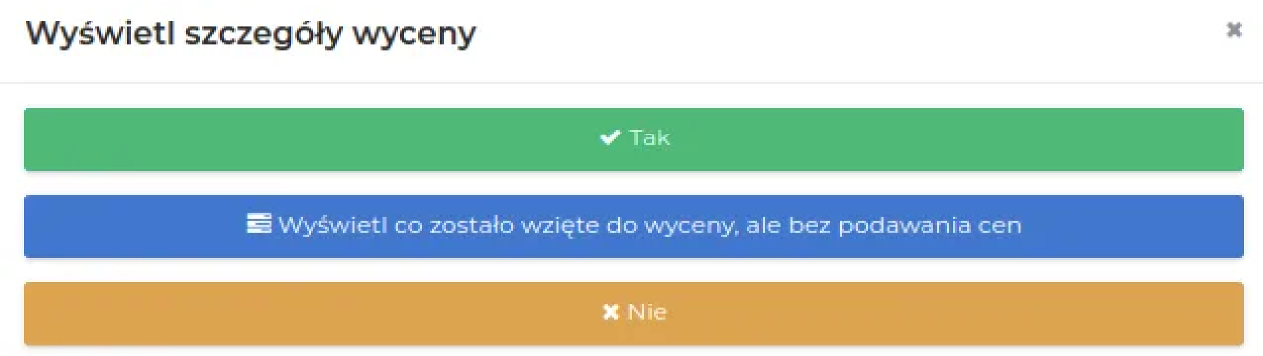
1. Go to the preview of the selected estimate by clicking on its name.

NOTE: You can create a PDF format estimate only for a project that has at least one “Scope of Work” and a specified final “Offer Amount.”

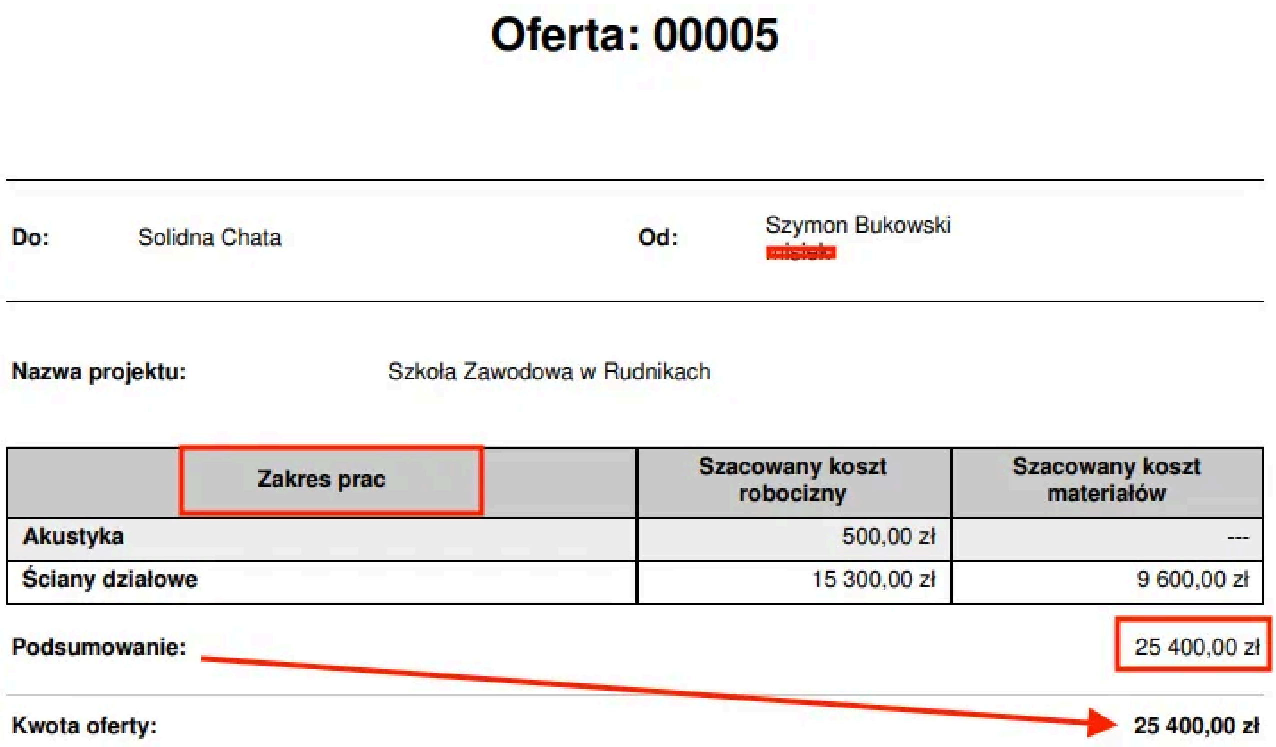
2. Select the “Estimate” tab and use the “Download PDF” function button.



3. Specify the estimate details to be visible on the PDF document by choosing one of the following options:



- **Yes:** A detailed estimate, including “Scopes of Work” that account for labor costs and material costs.



Oferta: 00005

Do:	Solidna Chata	**Od:**	Szymon Bukowski [redacted]

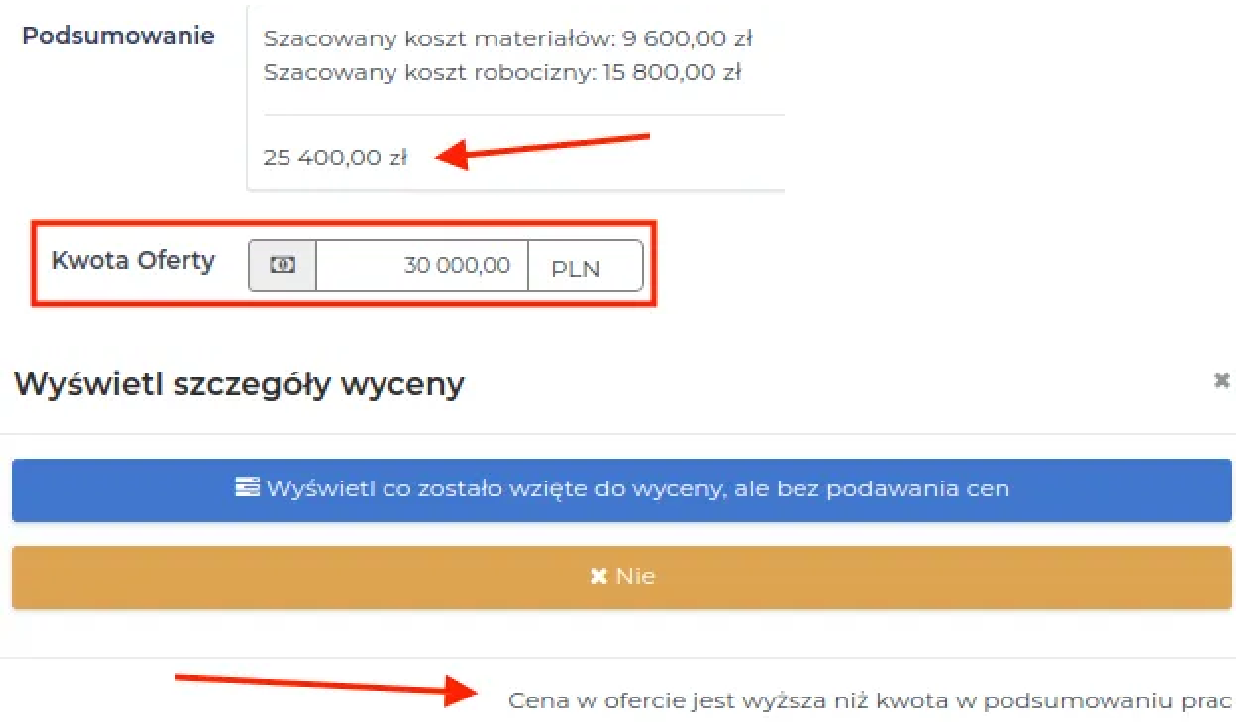
Nazwa projektu: Szkoła Zawodowa w Rudnikach

Zakres prac	Szacowany koszt robocizny	Szacowany koszt materiałów
Akustyka	500,00 zł	---
Ściany działowe	15 300,00 zł	9 600,00 zł

Podsumowanie: 25 400,00 zł

Kwota oferty: **25 400,00 zł**

> **NOTE:** If the “Offer Amount” exceeds the “Summary,” generating a PDF with such an estimate will be impossible.



- **Show what was included in the estimate, but without providing prices:** An estimate with hidden detailed costs for individual “Scopes of Work.”

Oferta: 00005

Do: Solidna Chata **Od:** Szymon Bukowski
[redacted]

Nazwa projektu: Szkoła Zawodowa w Rudnikach

Zakres prac
Akustyka
Ściany działowe

Kwota oferty: **25 400,00 zł**

- **No:** The estimate contains only the offer amount, without revealing the "Scopes of Work" and the costs associated with them.

Oferta: 00005

Do: Solidna Chata **Od:** Szymon Bukowski
[redacted]

Nazwa projektu: Szkoła Zawodowa w Rudnikach

Kwota oferty: **25 400,00 zł**

3. Download the generated file and save it to the target location on your disk.

> **REMEMBER:** You can send the prepared estimate immediately via email by clicking the "Send Email" button instead of "Download PDF".

Importing an Estimate from a Norma PRO (ATH) File

To meet customer needs, we have provided the ability to import files with estimates prepared in the Norma PRO program. This way, the fields for the estimate in Contractors.es will be filled automatically, eliminating the need to re-enter the estimate.

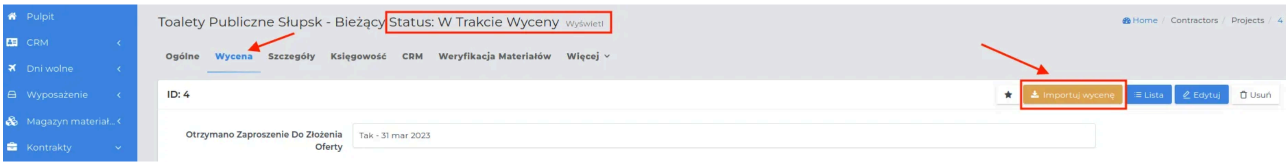
You can import an estimate from a Norma PRO file by following this procedure:

1. Go to the "Contracts → Projects" menu and select the project for which the data import should apply.

> **REMEMBER:** It can only be a project that is being estimated or a project that has a preliminary estimate prepared.

2. Click on its name and in the preview, go to the "Estimate" tab.

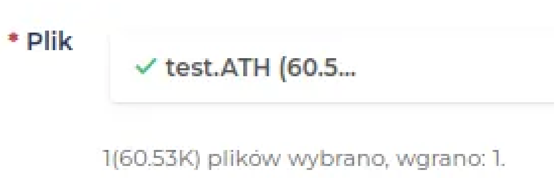
3. Use the function button "Import Estimate".



4. Fill out the form, where the meaning of the fields is as follows:

- **File Type:** Norma PRO, the possible format for import is (ATH).

- **File:** Select the file in the required format that was previously saved on the disk. A correctly imported file will be marked with a green "checkmark".

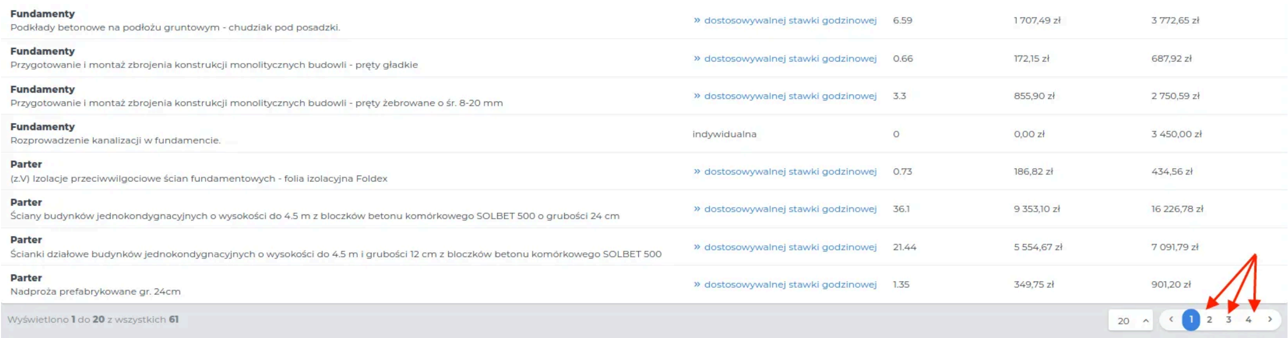


- **Clear previous scope of work and materials:** Set the slider to "Active" to clear the previously created project estimate.

> **REMEMBER:** With each import, it is worth marking the option to clear previous data to avoid duplicating them in the estimate. If the estimate is staged, e.g., performed by 2 estimators in 2 different files, then the previous estimate should not be cleared with the second file.

5. Save the form using the "Confirm" button.

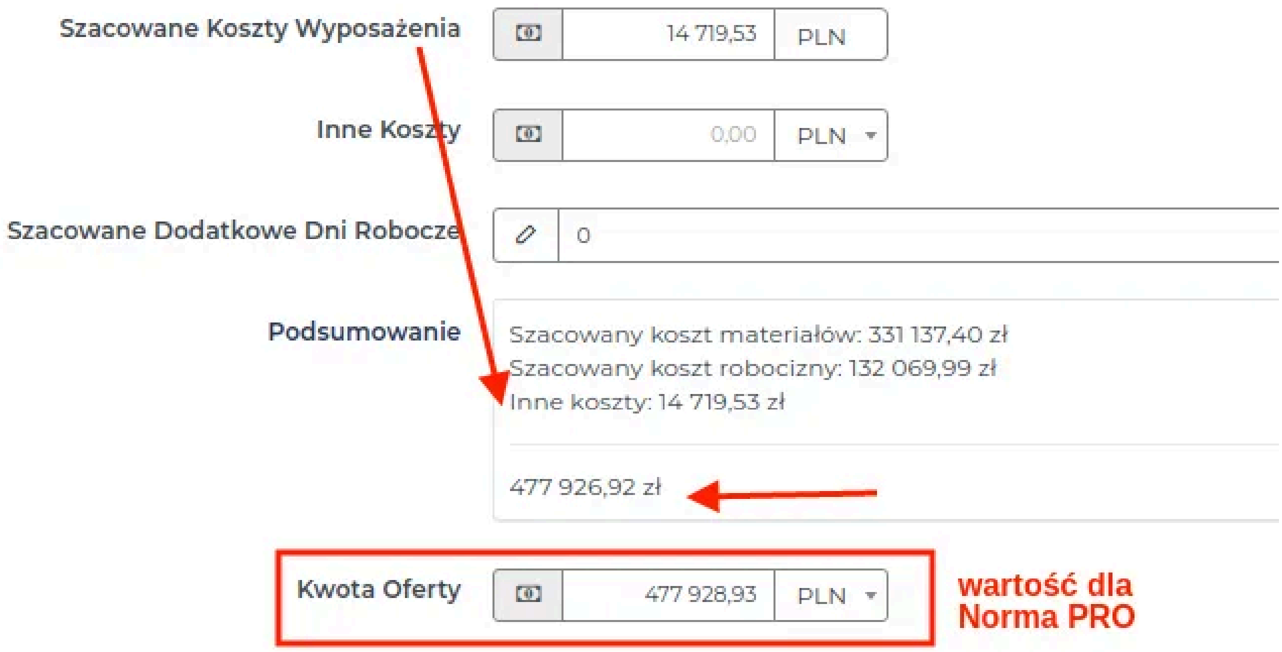
6. In the list in the "Estimate" tab, the names of the estimate stages will be imported according to the notation used in the Norma PRO program.



Fundamenty Podkłady betonowe na podłożu gruntowym - chudziak pod posadzki.	» dostosowywalnej stawki godzinowej	6.59	1 707,49 zł	3 772,65 zł
Fundamenty Przygotowanie i montaż zbrojenia konstrukcji monolitycznych budowli - pręty gładkie	» dostosowywalnej stawki godzinowej	0.66	172,15 zł	687,92 zł
Fundamenty Przygotowanie i montaż zbrojenia konstrukcji monolitycznych budowli - pręty żebrowane o śr. 8-20 mm	» dostosowywalnej stawki godzinowej	3.3	855,90 zł	2 750,59 zł
Fundamenty Rozprowadzenie kanalizacji w fundamencie.	indywidualna	0	0,00 zł	3 450,00 zł
Parter (z.V) Izolacje przeciwwilgociowe ścian fundamentowych - folia izolacyjna Foldex	» dostosowywalnej stawki godzinowej	0.73	186,82 zł	434,56 zł
Parter Ściany budynków jednokondygnacyjnych o wysokości do 4.5 m z bloczków betonu komórkowego SOLBET 500 o grubości 24 cm	» dostosowywalnej stawki godzinowej	36.1	9 353,10 zł	16 226,78 zł
Parter Ścianki działowe budynków jednokondygnacyjnych o wysokości do 4.5 m i grubości 12 cm z bloczków betonu komórkowego SOLBET 500	» dostosowywalnej stawki godzinowej	21.44	5 554,67 zł	7 091,79 zł
Parter Nadproża prefabrykowane gr. 24cm	» dostosowywalnej stawki godzinowej	1.35	349,75 zł	901,20 zł

Wyświetlono **1** do **20** z wszystkich **61**   20   ‹ 1 2 3 4 ›

NOTE: The values generated in the Norma PRO program round the estimate amounts differently, so the value in the "Summary" may slightly differ from the final value generated by Norma PRO. In a sample scenario, this difference will be about 2 PLN for the entire estimate.



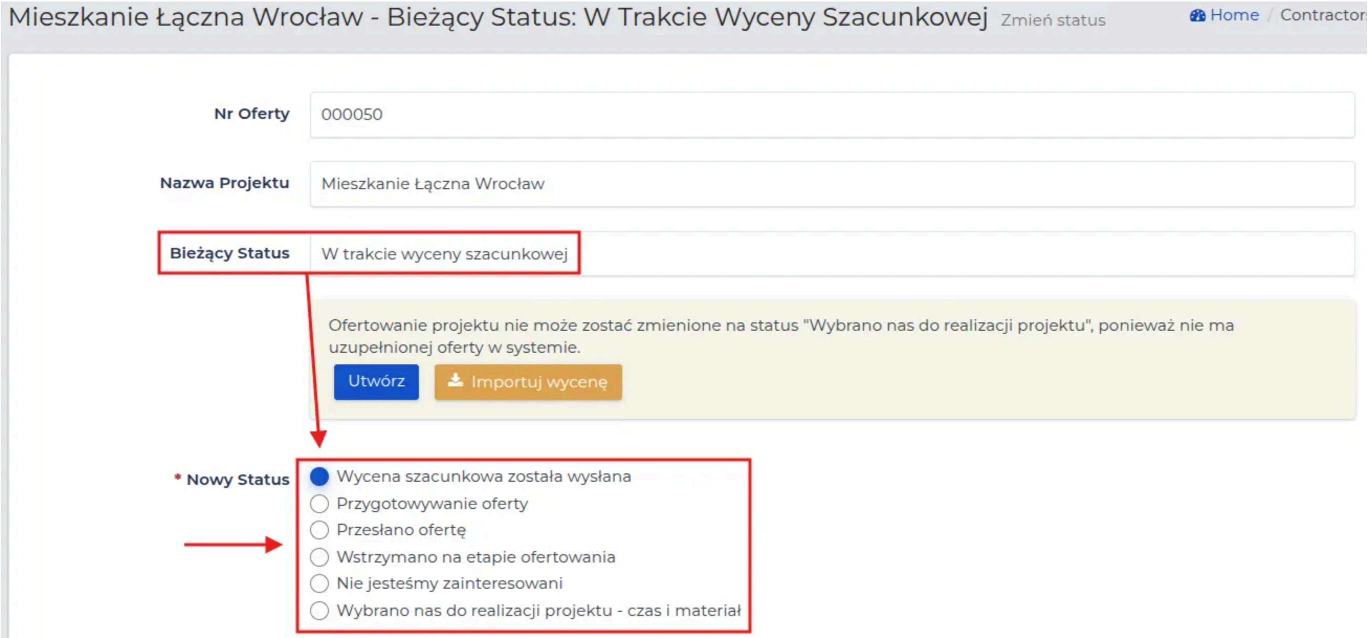
Updating Project Quote Statuses

Changing statuses in projects allows for tracking progress from the initial quote and informs about readiness for subsequent steps, such as approval or sending the quote to the client.

REMEMBER: To change the quote status, click its name and select the appropriate one from the available list. You don't have to go through all the statuses, but it's worth adding notes—they create a complete documentation of agreements with the potential client along with the document flow.

NOTE: Statuses related to client agreements can only be changed in project offers that have at least the status "In the process of preliminary estimation."

Example illustrating the next possible statuses to choose from, after the status "In the process of preliminary estimation."



- **Preliminary estimate has been sent:** Indicates that the estimate has been sent to the client for analysis. It is not yet a final commitment, but a proposal of costs and scope of work.

- **Preparing the offer:** The offer is being developed. You can still make changes to the scope of work, costs, and materials before sending it to the client.

- **Offer sent:** The offer has been sent to the client and is awaiting their decision. At this stage, changes to the estimate are not anticipated unless the client requests a revision.

- **Paused at the offering stage:** The offering process has been temporarily suspended. This may result from the client's decision, the need for additional arrangements, or other factors delaying further actions.

- **We are not interested:** The offer will not be further considered. This may result from unfavorable cooperation conditions, lack of resources, or other business factors.

- **We have been chosen to execute the project - time and material:** The client has accepted the offer in the "Time and Material" billing model. This means that work will be invoiced based on actual working time and costs incurred for materials.

- **We have been chosen to execute the project:** The client has accepted the offer, and the project moves to the execution stage.

- **Contract prepared:** The contract has been developed and is ready to be presented to the client. At this stage, any necessary amendments can still be made before signing.

- **Contract signed:** The client has accepted the terms and signed the contract. The project can move to the next stage of implementation.

- **Pre-construction documentation awaiting preparation:** The process of preparing the documentation has not yet started but is planned to be executed.

- **Pre-construction documentation in progress:** The documentation is being developed by the appropriate individuals or department. At this stage, required information and approvals may be gathered.
- **Pre-construction documentation completed:** All necessary documents have been prepared and are ready for verification or delivery to the client.
- **Pre-construction documentation verified:** The documentation has undergone internal review and complies with the requirements. It can be forwarded to the client for final approval.
- **Pre-construction documentation sent to the client:** The documentation has been delivered to the client for analysis and approval. We are awaiting their decision.
- **Pre-construction documentation approved by the client:** The client has accepted the documentation, and the project can proceed to the next stage.
- **Project in progress:** Work on the project is actively being carried out according to the schedule. Subsequent stages are being executed as agreed.
- **Project has been canceled:** The project implementation has been permanently halted. This may result from the client's decision, financial issues, or other factors.
- **Work suspended:** Temporary halt of work on the project. This may be due to weather conditions, lack of resources, or other factors requiring a pause.
- **Problem with the project:** Difficulties have arisen that may affect the timeline or budget. This requires analysis and appropriate action.
- **Completed:** Work on the project has been completed as agreed. Final settlement and acceptance may still be required.
- **Closed:** The project is completely finished, and all work, documentation, and settlements have been finalized.

> **REMEMBER:** For quotes with the status "We have been chosen for implementation," it is necessary to provide the "Contract Amount" before starting work.

> **NOTE:** Changing the status to "Project in progress" blocks the ability to edit general project information.

> **REMEMBER:** A project that has been completed and finished should always be marked in the system as "Closed." Only then can you forward it to accounting for financial settlement with the client.

Control and Supervision

In the “Control and Supervision” chapter, we focus on key aspects ensuring efficient project implementation, such as changes, control visits, requests for information, and material verification. These actions aim to ensure compliance with project assumptions and quality standards.

Changes in projects

During the implementation of projects, situations may arise that require changes. These can be modifications to the scope of work commissioned by the client or requests for change from the contractor. The changes introduced must be justified and precisely described to ensure transparency and understanding of their consequences.

> **REMEMBER:** Changes in projects can only be reported for “active” projects and for those whose valuation is not based on the “Time and Material” principle.

> **NOTE:** The amounts of changes in projects are by default visible only to the Administrator, Project Manager Assistant, Manager, Estimator, and Accountant. Other users see the names of changes, but without their amounts. Permissions can of course be modified in role settings.

You will enter the change request into the system according to the scheme:

1. Go to the “Contracts → Changes in projects” menu and select the “New” button.
2. Fill out the form, the meaning of the fields is as follows:

- **Title:** Name of the change or project modification.
- **Type:** Determine the side that reports the change.
- **Project name:** Select the project to which the change applies.
- **Estimator:** The person responsible for preparing the change estimate.
- **Department:** The department responsible for changes.
- **Description:** Additional information describing the need for change.
- **Date:** Date of application preparation.

3. Select from the list “Scope of work” and possibly “Additional materials”, if they are related to the reported change.

NOTE: If the scope of work requires the use of additional materials, they should be selected from the warehouse list or outside it and their value should be determined in the "Unit price" field.

REMEMBER: The "Unit price" for the selected material from the warehouse list is determined based on the last purchase made. You can change it according to your own needs.

REMEMBER: If you want to add a margin to the unit price of the material used from the warehouse, activate the "Add margin" option. This will provide a reserve for changes in purchase prices, according to the margin value set by the system administrator.

4. Optionally, fill in the two remaining fields in the form:

- **Margin percentage on additional materials:** The percentage value added to the amount of materials, exceeding the planned consumption level.
- **Additional days extending the investment:** The estimated number of days by which the planned implementation of works may be extended due to the introduced change.

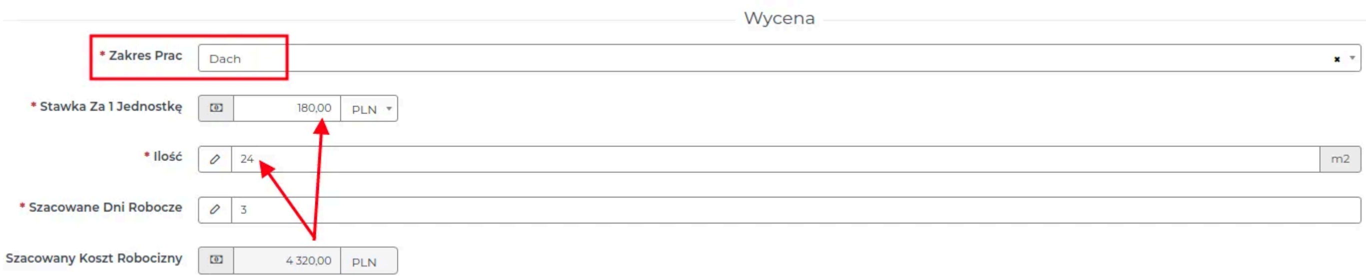
5. Verify the value generated by the system based on the changes made in the "Summary" field, which determines the amount increasing or decreasing the initial project valuation.
6. Set the "Status" indicating the current stage of creating the application. The system automatically marks the status as "Draft".
7. Save the data using the "Submit" button.

NOTE: Only changes in projects with the status "Accepted" can be continued in the further implementation of the project.

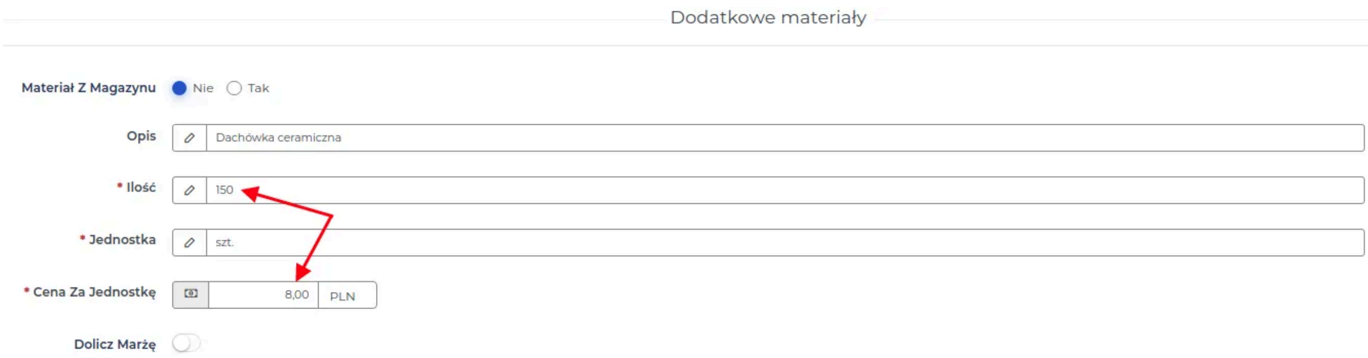
Example: The client has submitted a request for a change in the scope of work, which includes renovation of only a certain part of the roof.

1. In the "Contracts → Project changes" menu, we submit an application.
2. We define the "Scope of work", choosing:

- **Roof: 24 m2** of roof was reported, for which the rate without material costs for 1 unit of repair is **180.00 PLN.** Time allocated for the change: **3 working days**. The estimated cost for roof repair will be **4320.00 PLN.**



- **Additional materials:** It was agreed to purchase 150 pieces of ceramic roof tile at 8.00 PLN per piece. The total value of materials, without the added margin, will be **1200.00 PLN.**



3. We verify the summary and save the application form, in which the change will concern an increase in the cost of the service by the amount of **5520.00 PLN.**

> **NOTE:** Changing administrative settings for “Scopes of work” will not update previously saved changes in projects.

> **REMEMBER:** If you want to use the new administrative settings, delete and re-add the introduced change. Selected entries in the reported change cannot be deleted.

> **NOTE:** Costs associated with “Changes in projects” will be included in the “Invoices” section.

> **NOTE:** For each project, the numbering of changes starts from the beginning, which means that change numbers may repeat, but they refer to different projects.

Change of status for a submitted application for a change in the project

Applications for changes in projects are waiting for their status to be changed.

REMEMBER: Only authorized users can change statuses when reporting changes in projects.

NOTE: For projects settled on a “Time and Material” basis, applications for changes in the project cannot be submitted. However, a new project can be created in the system, which will be used to settle with the client for work to be done according to the estimate, not in the form of “time and material”.

To change the status for a submitted application for a change in the project, follow the order:

1. Go to the “Contracts → Changes in projects” menu and click the “Edit” action button for the selected application.

2. Verify the content of the application and select a new status at the bottom of the form, the meaning of which is as follows:

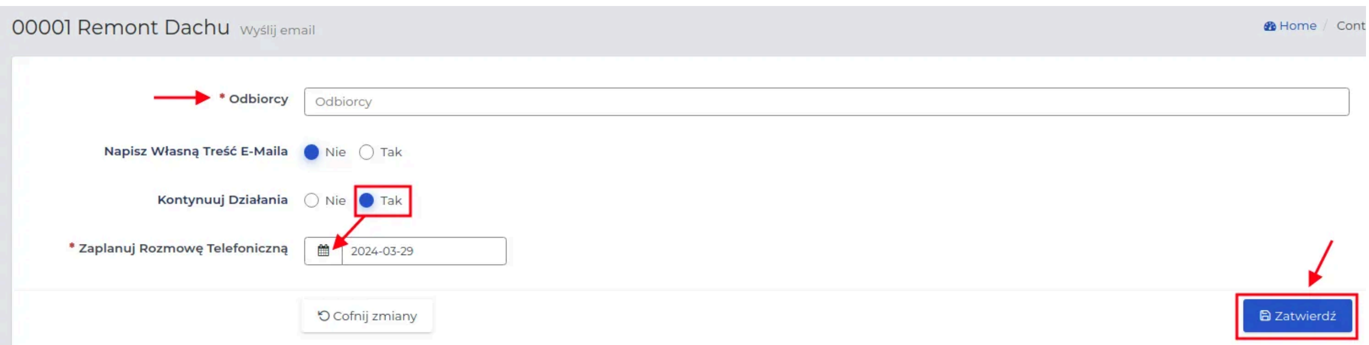
- **Draft:** Status automatically set by the system for the entered record regarding a new change in the project.

- **Verified:** The change has been previously checked for correctness.

- **Sent:** The document with the change has been sent to the client for acceptance.

REMEMBER: In the change preview, use the “Send email” button to convey the content with the change in the project.

NOTE: Specify the recipient of the email by selecting them from the contact list or add them if they do not exist in the system, in the manner described here.



> **REMEMBER:** You can enter your own message content and continue actions related to accepting the submitted change by selecting the "Yes" option.

> **NOTE:** It is worth attaching the sent email content to the project to which the agreed change is to apply.

- **Accepted:** Conditions containing details of the settlement for the change have been accepted. The "Acceptance Date" and "Contract Amount" fields should be completed.

At this stage, billing arrangements can be omitted. Only after the work is completed, the accounting department will properly prepare the settlement for the resulting change. More about project billing can be found [here]/en/contracts/4/).

> **REMEMBER:** After accepting changes in the project, enter the work schedule for employees according to the number of days given in the "Estimated working days" field. More about creating a work schedule for employees can be read [here]/en/contracts/5/).

> **REMEMBER:** Submit a material request for the change in the project only after it has been accepted by the client.

> **NOTE:** After accepting the application, further editing is possible only for accounting purposes. You cannot change the arrangements and amounts that have been approved and have received the "Accepted" status.

- **Not accepted:** No agreement to make changes to the project.

3. Save the changes with the "Approve" button.

> **NOTE:** Downloading the document in PDF format is only possible for changes with the "Sent" status. This file can be printed and delivered to the client in paper form.

> **Example:** A sample document in PDF version presenting the "Request for approval of changes in the project".

Data: 5 kwi 2023

Wniosek o zatwierdzenie zmiany w projekcie: 00002

Do: Drewnoświat Dolnośląskie **Od:** [redacted]

Nazwa projektu: Szpital Dziecięcy Wiatraczna

Tytuł: dachówka ceramiczna

Zakres prac	Szacowany koszt robocizny	Szacowany koszt materiałów
Dach	8 000,00 zł	---

Materiały	Ilość / Cena za jednostkę	Podsumowanie
dachówka brąz (+Marża)	300 szt. x 20,00 zł	6 000,00 zł
Marża		(0.00%)

Podsumowanie: 14 000,00 zł

Dodatkowe dni robocze potrzebne do ukończenia projektu: 5
Dodatkowe dni przedłużające inwestycję potrzebne na ukończenie prac: 5

> **REMEMBER:** Reported changes in the project must be accepted by the client before their implementation. The change acceptance process should be formally confirmed by both parties. Only then can you start planning work or ordering the necessary material.

Project control visits

The purpose of a control visit to the project is to ensure monitoring of work progress and to check whether the work is proceeding according to plan and expectations. The types of control visits are determined by the **system administrator**.

> **NOTE:** Inspections can apply to projects with various statuses. Before starting a project, the inspector may determine, for example, the condition of the building, during the work, control the workers, and at the end of them, determine the quality of the work.

If you want to create an inspection, follow the order:

1. Go to the “Contracts → Inspections” menu and select the “New” button.

2. Fill out the form, the meaning of the fields is as follows:

- **Project name:** Choose from the list the project for which the inspection is intended.
- **Inspector:** Determine the person responsible for conducting the inspection. Information about the visit will appear in the selected employee’s calendar according to the date of the planned visit.
- **Status:** Visit status - default “Pending”.
- **Type of inspection:** Choose the subject of the visit from the system list, e.g. “Estimate” or “Safety”.

> **NOTE:** For “Types of construction site visits” for which the **administrator** has set the “active” slider in the “Estimation accuracy and work progress” field, when changing the status, the inspector will have to make an additional description regarding the progress of the work.

- **Inspection date:** Determine the date and time of the start of the inspection.
- **Duration:** Choose the number of minutes or hours of the visit or the option “Select date and time” for a non-standard time range, for which in the “End” field you can specify the end time of the inspection.
- **Reason for inspection:** You can describe the reason and objectives of the planned inspection.

3. Save the data using the “Submit” button.

Changing the status for the entered inspection

Changes in inspection statuses allow tracking progress and the current state of inspection on the project.

> **NOTE:** The administrator has the ability to create a special survey containing questions for the inspector, the answers to which are necessary to change the status - to add a rating sheet, go to the settings of types of construction site visits (Admin → Contracts → Types of construction site visits), and then in the preview of the type of visit, select the “Ratings” tab.

To change the status for a logged inspection visit, follow the scheme:

1. On the calendar in the “CRM & Organizer” menu, after the visit is over, click on the field with the name of the visit on the project.

> **REMEMBER:** You can filter the list of inspection visits in the “Contracts → Inspection visits” menu to easily find the inspection visits assigned to you.

2. In the form, in the “Status” field, click on the name of the current status “Pending”.

3. Set a new status by selecting one of the options:

- **Completed:** The visit has been carried out.
- **Cancelled:** The visit has been cancelled.

4. Add a note explaining the course of the inspection visit.

> **REMEMBER:** If the inspection visit is to be rescheduled, in the “Create a new event as a continuation” field, select “Visit to the project”.

5. Save the data using the “Confirm” button.

> **NOTE:** Visits with the status “Completed” for which no further continuation has been set can be considered closed.

Requests for Information

Requests for information are used to obtain additional explanations or information about the project being implemented. The circulation of this documentation in the system is similar to the process of reporting changes in the project.

You will enter a request with a change notification into the system according to the scheme:

1. Go to the “Contracts → Requests for Information” menu and select the “New” button.

2. Fill out the form, the meaning of the fields is as follows:

- **Project name:** Select the project to which the application relates.
- **Title of the application:** Define the subject of the application.
- **Description of what explanations are needed to implement the project:** Indicate the items causing doubts during the implementation of the project and specific questions requiring explanations.
- **Attachments (documentation):** Optionally add files with marking of elements that are the subject of the application e.g. technical specifications, construction plans.
- **Assigned employees:** Select employees associated with the project to which the request for information relates.
- **Date:** Date of submission of the request for information.
- **Status of the application:** The current stage of the request for additional information process. The system automatically marks the status as “Pending”.

3. Save the data using the “Confirm” button.

> **NOTE:** The request for information can also be created by the foreman through the mobile application.

Changing the status for a submitted request for information

The progress of work related to providing a response for a submitted request for additional information is determined by its status change.

After selecting the request in the “Contracts → Requests for Information” list, you should click on the current status name and select a new status from the available options:

- **Pending:** The request has been submitted, but has not yet received a response.
- **In progress:** The request is being considered.
- **Completed:** A response has been received to the question contained in the request.
- **Cancelled:** The submitted request has been rejected.

> **REMEMBER:** Only a “Pending” request can be sent as an attachment via email or generated as a PDF file for direct transfer to the person responsible for its consideration.

> **Example:** A PDF version of the document showing the “Request for Additional Information”.

Data: 25 sty 2023

Wniosek o dodatkową informację 00001

Urząd Miejski w Ciechocinku
Kopernika 10
87-720 Ciechocinek

Projekt:
Hala sportowa
Spokojna 10
Spokojna 10
08-110 Ciechocinek
Kujawsko-pomorskie

Klient:
Urząd Miejski w Ciechocinku

Tytuł wniosku
Stropy gęstożebrowe grubość przekroju
Opis jakich wyjaśnień potrzeba do realizacji projektu
Rozpiętość dachu ujęta w projekcie, przekracza zastosowanie węższych stropów gęstożebrowych.
Zaangażowani pracownicy
Szymon Bukowski ([redacted])

> **NOTE:** Changing the status to "Completed" for a submitted request for information is equivalent to accepting the explanations provided by both parties.

Verification of materials intended for implementation

It is worth checking whether the construction material or other product meets the standards required by the project before using them. This verification ensures safety and minimizes the risk of potential complaints, discrepancies or even accidents. Creating a request for material verification is necessary when we have doubts about its compliance with the required standards.

Creating requests for material verification is done according to the scheme:

1. Go to the "Contracts → Requests for Information" menu and select the "New" button.

2. Fill out the form, the meaning of the fields is as follows:

- **Project name:** Select from the list the project to which the notification relates.
- **Request title:** Specify what the submitted request should concern.
- **Specification number:** The number assigned by the supplier specifying the standards of the supplied product.
- **Product Description:** Describe the appearance and distinctive features that the material should have.
- **Attachments (Documentation):** Add electronic files, e.g., project documentation.

- **Manufacturer:** Provide the name of the product manufacturer or select it from the list belonging to the "Supplier" group.
- **Supplier:** Select the unit that supplies or intermediates in the sale of a given material or goods.
- **Responsible Employee:** Select the employee who is responsible for verifying the submitted application.
- **Date:** Provide the date of submission of the verification application.
- **Status:** Select the current stage at which the application for material verification is located. The system automatically marks the status as "Pending".

3. Save the data using the "Submit" button.

Changing the status for a submitted application for material verification

The way to change the status in the application for material verification is identical to the two types of applications described above. After selecting the application in the "Contracts → Material Verification" list, click on the current status name and select a new status from the available options:

- **Pending:** The application has been submitted, but has not yet received a response.
- **Accepted:** A positive response has been given to the application, i.e., the product meets the required standards indicated in the project documentation.
- **Accepted with note:** The response to the application included information with an explanation in the "Acceptance Note" field - product conditionally accepted.
- **Rejected:** A response was received that the material does not meet the required standards and cannot be used.

> **REMEMBER:** Only the "Pending" application can be sent as an attachment by e-mail or generated as a PDF file for direct transfer to the person responsible for its consideration.

> **Example:** A sample document in PDF version presenting the "Application for Verification".

Wniosek o weryfikację 00001

Urząd Miejski w Ciechocinku
Kopernika 10
87-720 Ciechocinek

Projekt:
Hala sportowa
Spokojna 10
Spokojna 10
08-110 Ciechocinek
Kujawsko-pomorskie

Klient:
Urząd Miejski w Ciechocinku

Tytuł wniosku	
gazobeton	
Opis produktu	
kruchy i "napompowany"	
Producent	
Betonex	
Kontakt	
Agata Sikorska	
Dystrybucja	
Kopia do akt	Kopia budowlana

Data Otrzymania	Pieczęć/podpis kierownika budowy	Pieczęć/podpis kontrahenta
	Otrzymane i sprawdzone pod kątem zgodności z dokumentami kontraktowymi Osoba:______________ Data:______________	Niniejszym oświadczamy, że przejrzeliśmy, sprawdziliśmy i zatwierdziliśmy przesłane informacje oraz ręczymy za dokładność i zgodność z dokumentami kontraktowymi i warunkami towarzyszącymi. Osoba: Agata Sikorska Data: 2023-01-25
Data otrzymania od architekta / inżyniera	Weryfikacja nie zwalnia Kontrahenta z odpowiedzialności za jakiekolwiek odstępstwa od wymagań określonych w dokumentacji kontraktowej.	

Pieczęć/podpis architekta + komentarze	Pieczęć/podpis konsultanta + komentarze

Settlements

In the settlements section, we focus on monitoring and documenting all financial transactions related to projects. Each invoice, cost, or subcontract entered into the system is an element taken into account in reports on the project budget. Thanks to this, we can track and control expenses, identify any discrepancies, and take appropriate corrective actions.

In the “Contracts → Invoices” section you can:

- Review invoices issued for ongoing projects.
- Export the invoice list to CSV/XLSX format.

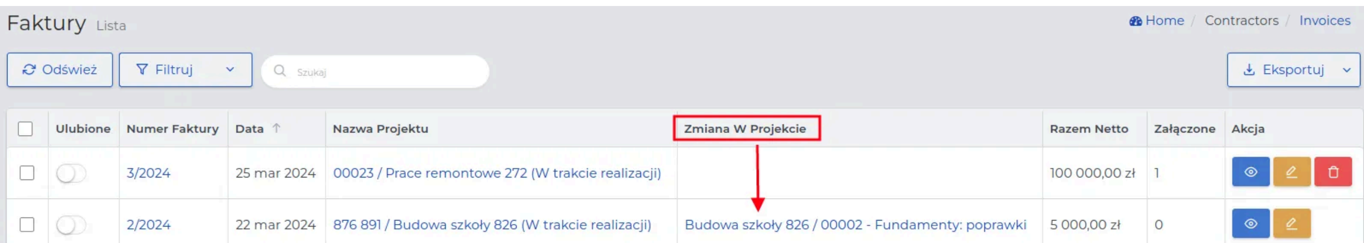
> **REMEMBER:** By default, only the **administrator** can export the invoice file. To change this, you need to edit role permissions (e.g., add the ability to export to the accountant’s role).

> **NOTE:** You can create a user account for the Accountant role, which will allow access to the invoice list without the need to export and send files.

The invoice list only shows those invoices that were issued by the Contractors.es software or were entered into the system during the settlement of a selected project after issuing an invoice in another program.

> **NOTE:** By default, only the Accountant has full access to the invoice list and the ability to make changes. The Manager can view all invoices, but cannot add or edit them. The Project Manager and Estimator only have access to invoices added under their projects.

> **REMEMBER:** If an invoice on the list is associated with a change in the project, this will be marked in the appropriate column in the way shown in the screenshot below.



Types of settlement invoices

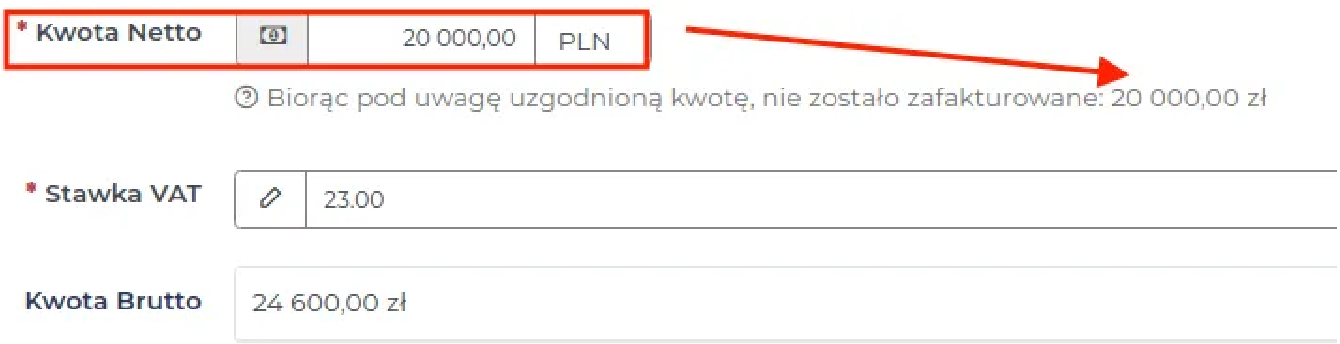
Settlement invoices are documents used for financial settlement between two parties to a contract for services rendered or products delivered. They are used to settle payments and reflect progress in the implementation of a project or contract.

Partial or full invoice applies to situations when:

- A selected stage or scope of work has been completed - the invoices issued so far reduce the contractual obligation with each subsequent settlement.
- The project is settled on a “Time and Material” basis - based on the work done so far.

Advance and final invoices are used when:

- We settle with advance invoices before the work is done, during it, and with a final invoice after the project is completed.
- The value of the final invoice is reduced by the amount of the advance payment.



Issuing/adding an invoice for a client to the project

To issue an invoice for a stage or service related to the project being implemented, proceed in the following order:

1. Go to the “Contracts → Projects” menu and select the project you want to settle by clicking on its name with the cursor.

> **NOTE:** Invoices can be issued/added only by users with appropriate permissions, which are modified and set by the **administrator**. By default, only accounting can issue/add invoices.

> **REMEMBER:** If the first invoice issued for a given project has a specified billing method, then subsequent invoices for this project must be settled in the same way.

> **NOTE:** Projects implemented on a "Time and Material" basis are always settled on the basis of partial and total invoices.

2. In the preview, select the "More → Invoices" tab, and then click on the "New" button.

3. Fill out the form, the meaning of the fields is as follows:

- **Type:** When creating the first invoice for the project, choose the type of invoice settlement from the available options:
  - partial or total invoice,
  - advance invoices and final invoice.
- **Date:** Invoice issue date.
- **Payment deadline:** Determine the financial obligation deadline of the client.

> **NOTE:** The field is automatically filled with the default value set by the **administrator.** If the payment deadline has been set by him for 14 days, the "Payment deadline" field will display a date corresponding to this setting.

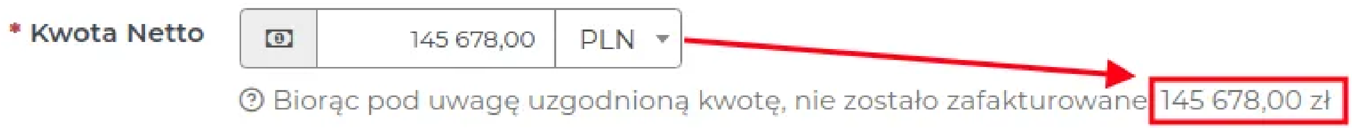
- **Name of the goods or service:** Describe the scope included in the invoice settlement.
- **Net amount:** The value of the client's obligation, expressed in net amount.

> **NOTE:** The system suggests the settlement amount in the "Net amount" field, which has not yet been invoiced.

According to the valuation method specified in the project, two options are available.

Option I: For projects with a specified contract amount.

- The net value includes the remaining contract amount.
- You can change this value, and the remaining difference will remain for subsequent invoices.



Option II: For projects settled according to the "Time and Material" scheme.

- The net value includes:

  - **“Current labor cost”** - a list of hours worked by employees within a specified time range, gathered based on their logins in the mobile application or entered into the system.

  - **“Summary of work and materials”** - an amount specifying the total costs associated with a specific stage of work, which include: “Current material costs”, “Other labor” and “Current other costs”.

> **REMEMBER:** Make sure you have verified the working time of employees for any incorrect starts/ends of work before issuing an invoice for a given period.

> **NOTE:** Unregulated working time of employees will be taken into account in subsequent settlements.

The remaining visible fields for this type of project valuation relate to:

- **Amount invoiced in other invoices:** The sum of all amounts that have already been invoiced in previous invoices for a given project.

- **Outstanding balance without invoice:** The difference between the sum of currently accrued work and material costs, and the amount invoiced in other invoices.

The further part of the form will be the same for both valuations and contains data:

- **VAT rate:** Determine the VAT rate depending on the service provided.

- **Gross amount:** The net value increased by the selected type of VAT rate.

- **Footer on the invoice:** Optionally additional content visible at the bottom of each issued invoice.

> **REMEMBER:** If the **administrator** sets the content of the “Footer on the invoice”, the value in this field will be automatically filled in by the system.

- **Update work progress:** Choosing “Yes” automatically updates the work progress to the selected level. This field is used when site visit reports and daily foreman reports in your company are performed sporadically.

4. Save changes using the “Commit” button.

> **NOTE:** The “Paid in full” and “Paid amount” fields suggest the amount of settlement with the contractor.

> **REMEMBER:** To send the saved invoice to the contractor via e-mail, use the “Send e-mail” button and specify the recipient of the message. By default, it is the contractor - the customer’s contact/company must have an e-mail address entered.

Project cost register

During the implementation of the project, additional costs may occur (apart from the cost of employees and materials). By adding these costs to the system, we get the actual "Project financial balance", showing profits or losses. The "Costs" module allows you to add these expenses, which allows for more accurate monitoring of the project's finances.

> **NOTE:** Project costs can be created and viewed by the Project Manager Assistant, Manager, Project Manager, Estimator, and Accountant, in addition to the administrator.

You can add a project cost in the following order:

1. Go to the "Contracts → Costs" menu and select the "New" button.
2. Fill out the form, the meaning of the fields is as follows:

- **Project name:** Choose the project from the available list to which this cost refers.
- **Cost name:** Enter the name of the incurred cost. This field is required.
- **Invoice number:** Optionally provide the invoice number associated with this expense.
- > **Note:** Add additional information about this cost if necessary.
- **Date:** Provide the date of the cost incurred.
- **Cost type:** Determine the type of expense, whether it concerns material, salary, equipment, or another type of cost.
- **Amount:** Enter the value of the incurred cost, which will be included in the final project settlement.

3. Save the data using the "Commit" button.

Subcontracting agreements

Subcontracting agreements are concluded between our company and an external entity that performs specific tasks or services within the project. The terms of cooperation entered into the system will allow for smooth and clear settlements of contracts with subcontractors.

> **NOTE:** Subcontracting agreements can be added by the Project Manager Assistant, HR, Manager, Project Manager, and Estimator, in addition to the administrator. The function of settling contracts lies with the Accountant.

> **REMEMBER:** According to regulations, the subcontracting agreement must be in writing. The deadline specified in the contract is the basis for payment for services rendered. Optionally, you can attach it to the “More → Attached” tab in the selected project.

> **REMEMBER:** If there is not yet a project in the system that is to be associated with the “Subcontracting Agreement”, create a record of this project in the “Contracts → Projects” section.

You will register the subcontracting agreement in the system in the following order:

1. Go to the “Contracts → Projects” menu and select the “New” button.

2. Fill out the form, the meaning of the fields is as follows:

- **Project:** Choose from the list the project that the subcontracting agreement should concern.

- **Subcontractor:** Specify the entity from the “Subcontractor” group, responsible for performing the service.

- **Scope of the contract:** Describe the arrangements for the work to be done and the deadline for their implementation.

- **Time and material:** Choose the method of settlement for the service, by making a choice:

    - Choosing the **“No”** option - the contract concerns a specific amount for the service, regardless of the number of hours worked by employees and the days needed for implementation.

    - Choosing the **“Yes”** option - the settlement for the service will be added up after summing up the working hours of the employees, for whom the contractual cost per hour of their work should be determined. You can enter their working time into the system or create accounts for the subcontractor’s foremen to improve communication and count working time.

> **REMEMBER:** The daily reports created with the number of employees performing a given scope of work will sum up the total number of hours worked, which will be multiplied by the hourly rate for performing the service.

- **Non-standard hourly rates:** Optionally adjust the payment rates for non-standard working hours of employees in subcontracting agreements, taking into account the specifics of work or special conditions. They are set individually.

- **Non-standard percentage wage rates:** Special arrangements for employee working time settlements, exceeding basic rate hours. These fields are automatically filled in by the system with the values set by the **administrator**. These amounts can be changed.

> **REMEMBER:** The system allows for the introduction of multiple subcontracting agreements for the same project and subcontractor simultaneously. The scope of each contract should be specified in a separate form.

3. Save the entered data using the “Confirm” button.

> **NOTE:** In the case of a subcontracting agreement for a project settled on a "Time and Material" basis, it is recommended to complete the "Work Schedule History" tab or monitor it in case the subcontractor's foreman uses the mobile application and account in the Contractors.es system to monitor the progress of work and the number of hours worked, according to which the service will be settled.

To add a "Work Schedule History", follow the scheme below:

1. Go to the preview of the selected subcontracting agreement by clicking on its name with the cursor.
2. Select the "Work Schedule History" tab and complete the form, the meaning of the fields is as follows:

- **Planned work start:** Enter the date and time of the start of the work commissioned to the subcontractor.
- **Planned work end:** Enter the date and time of the end of the work commissioned to the subcontractor.

> **NOTE:** In the form, you can specify the scope of work for a single working day. To include subsequent working days, use the "Planner → Employee Schedule" section.

- **Lunch break:** Leave the field blank as the employees are not employed in your company.
- **Scope of work:** Choose from the list the suggested type of work commissioned to the subcontractor for a given day.

> **NOTE:** The subcontractor's foreman can change the scope of work you entered when submitting daily reports, choosing another one from the list available in the mobile application.

- **Subcontractor's Foreman:** Choose the subcontractor's foreman from the list.

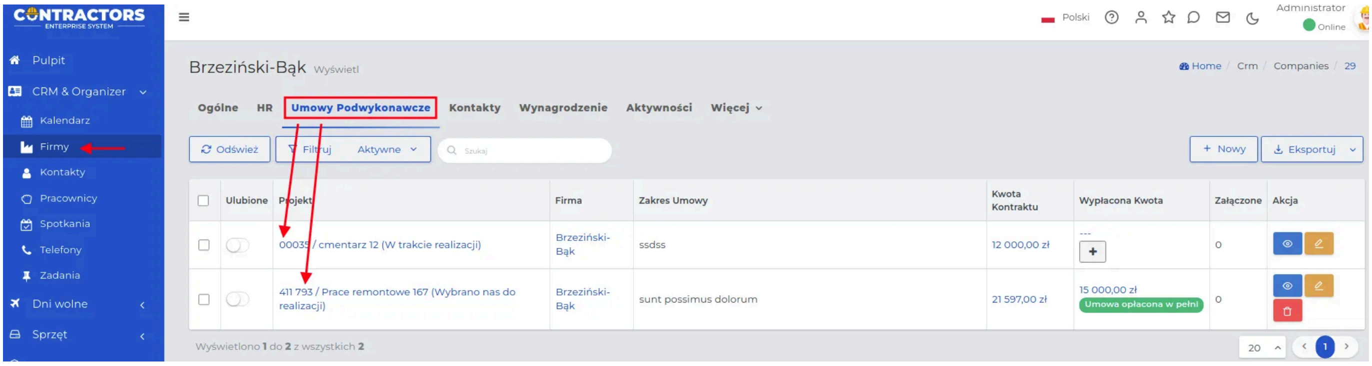
> **NOTE:** Create a new contact for the subcontractor's foreman if it does not exist in the system. This is a necessary requirement.

> **REMEMBER:** If two independent crews are to work on the construction site, and each of them is to have a different foreman, then create a separate contact for each of them.

- **Planned number of Subcontractor's employees:** Enter the number of employees who will be assigned to perform the task, in accordance with the arrangements with the subcontractor.
- **Non-standard percentage salary rates:** By selecting "Yes", you have the option to adjust the administrative settings entered here and enter new values in the form fields.
- > **Note:** An optional additional description referring to the arrangements for work allocation.

4. Save the data using the “Confirm” button.

> **REMEMBER:** “Subcontracting Agreements” concerning one subcontractor are available in the preview of his record in the “CRM & Organizer → Companies → “Subcontracting Agreements” tab.



> **NOTE:** In the “Work Schedule History” preview based on daily reports, which are sent by the subcontractor’s foreman using the mobile application, fields marked with a red arrow will be noted, informing about the actual working time and the number of employees involved in performing the contracted services.

Settlement of the contract with the subcontractor

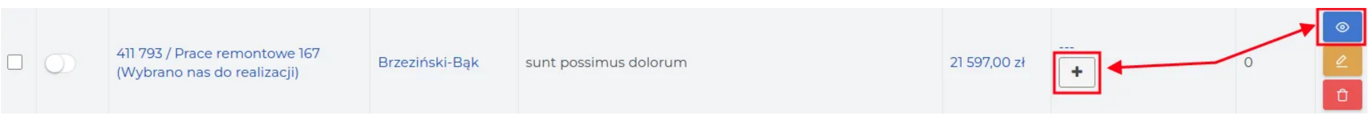
In the “Contracts → Subcontracting Agreements” section, the system automatically displays a list of unsettled contracts, marked with the “Active” option. You can filter records on the list using standard methods.

> **NOTE:** Only users with appropriate permissions have the ability to make changes in the records of this system section.

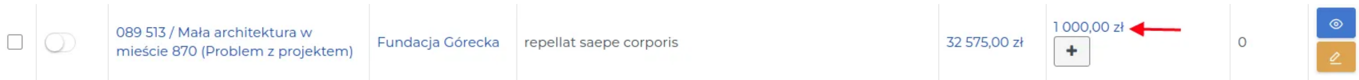
If you want to settle a contract with a subcontractor, follow the scheme:

1. Go to the “Contracts → Subcontracting Agreements” menu and find the contract you want to settle.

2. Click on the ”+” button or the “Display” action button.

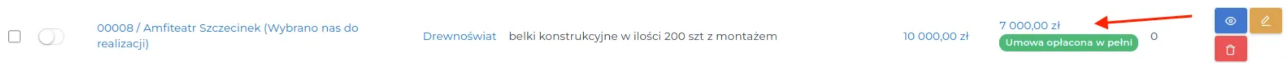


NOTE: In the case of continued settlements, the amount settled so far will be visible, which will allow tracking the remaining amount to be paid to the subcontractor.



3. Fill out the form, the meaning of the fields is as follows:

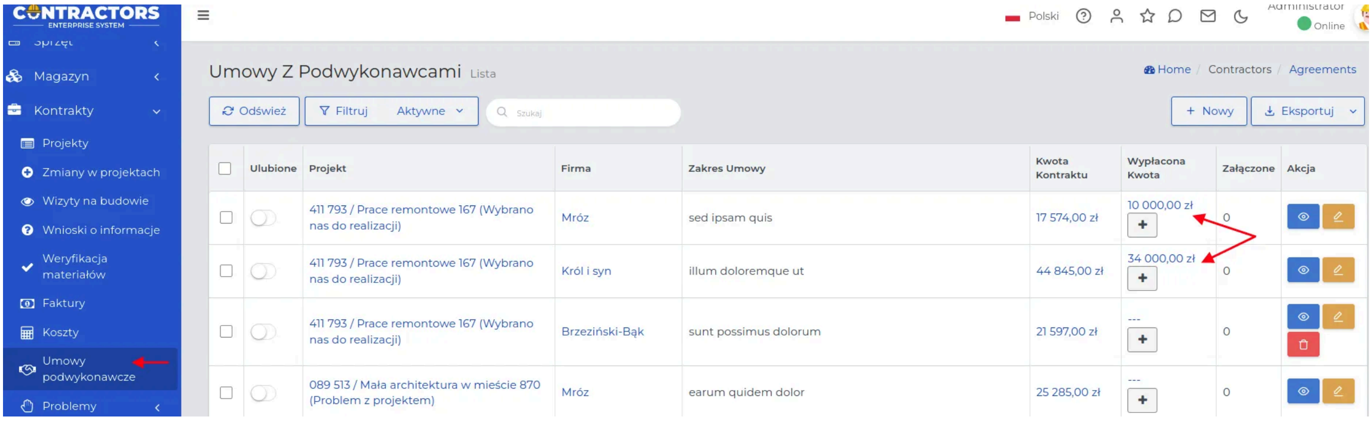
- **Contract with Subcontractor:** The name of the subcontractor to whom the service settlement applies.
- **Data:** The day on which the settlement for the service provided, included in the contract, was accepted.
- **Paid amount**: The monetary value that will be transferred to the subcontractor.
- **Payment description:** The method of transferring the payment for the service with a note regarding its receipt, for example “In accordance with the contract”, “Delay … days”, “Incomplete service” etc.
- **Contract fully paid:** Determine the payment status for the subcontract by making a choice:
    - **“Active”** switch - “Paid amount” may differ from that given in “Contract amount” due to comments on the performance of the service (e.g. improperly performed service).



    - **“Inactive”** switch - the contract will remain on the list with the visible “Paid amount” for further settlement.
- **Contractual work completed:** Determine the stage of the conditions included in the contract by making a choice:
    - **“Active”** switch - the work specified in the contract has ended, the contract is moved to the “Contractual work completed” list.
    - **“Inactive”** switch - the contract remains on the “Active” list until further settlement with the subcontractor.

3. Save the changes using the “Confirm” button.

REMEMBER: If the contract with the subcontractor is to be settled based on the total number of hours worked by employees, the value in the “Contract amount” column will be automatically updated according to workday reports. After the project is completed, the sum of the employees’ working time will stop accumulating.

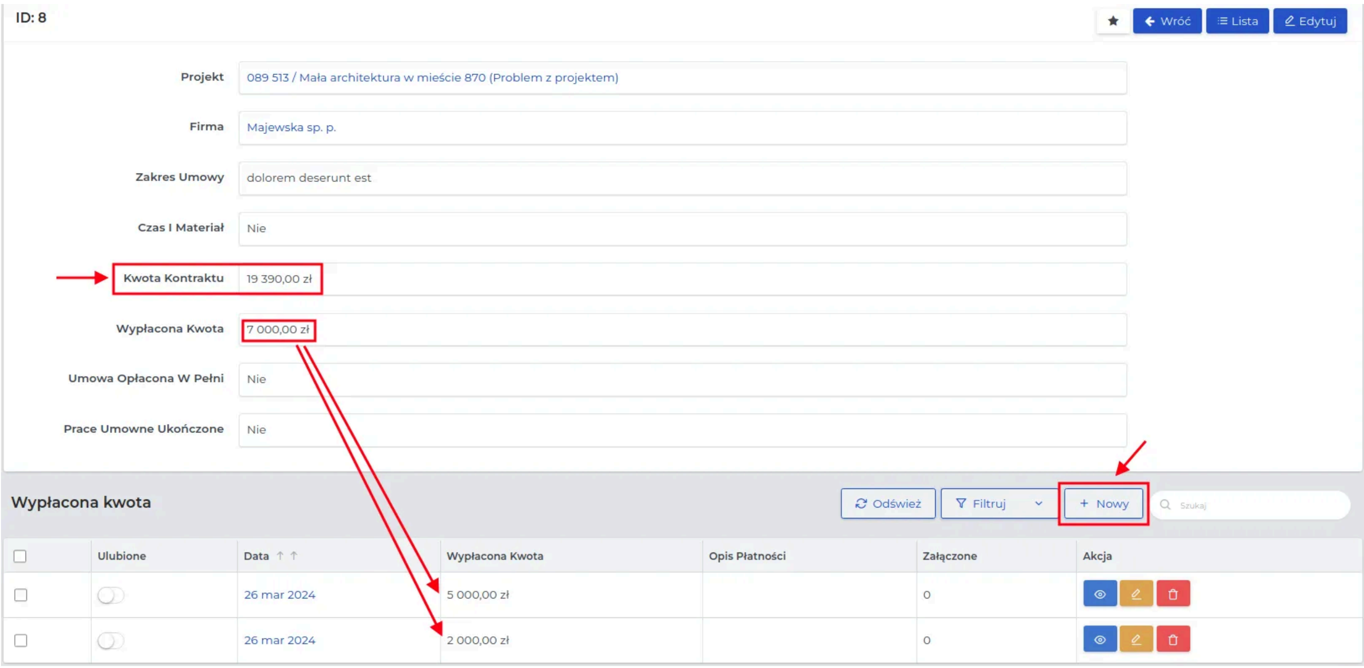


Example illustrating multi-stage settlement with a subcontractor.

1. On the list of subcontractor contracts, find the contract to be settled.

2. Click on the “Paid amount” or the “Display” action button.

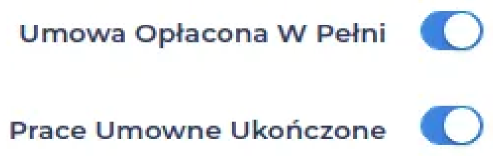
3. A list of the amounts paid so far, referring to the given contract with the subcontractor, will be displayed on the screen.



4. By subtracting the value in the “Paid amount” field from the “Contract amount”, you will get the remaining amount to be settled with the subcontractor.

5. Click on the “New” button and enter a new settlement in the form, entering the value by which the “Contract Amount” is to be reduced in the “Paid Amount” field.

> **REMEMBER:** If the settlement went according to the agreement and reached the final stage, it is important to mark the sliders as “active” in the last two fields of the form.



6. Save the entered data using the “Confirm” button.

> **REMEMBER:** Actions on subcontractor agreement records should be coordinated with accounting.

Employee remuneration

Employee remuneration for working time is settled in accordance with:

- **The number of hours worked** settled based on system settings, available in the sections:

“Admin → General Settings → Calendar → Default working hours”,

“Contracts → Settings → Working time: Number of hours of the working day”,

- **The value of hourly rates**, set individually in the system for each employee through the module:

“CRM → Employees → selection of an employee from the list → “HR” tab. Variables relate to records for which have been defined:

- **Standard gross hourly rate** (in the case of a fixed salary),
- **Non-standard hourly rates** for specific ranges of work,
- **Non-standard percentage rates of salary**, such as overtime outside the range of working day hours or hours above the number of working day hours.

> **NOTE:** If the employee is not an employee of the company, his settlement is made in accordance with the terms contained in the subcontracting agreement.

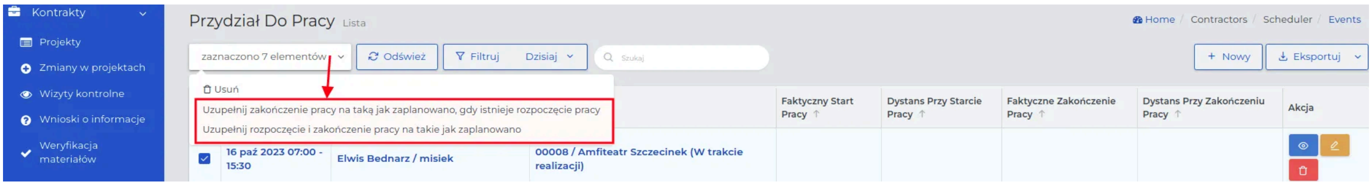
> **REMEMBER:** The rates of field employees who use the mobile application are recorded in the “Contracts → Planner → Browse events” section when creating a work planning record and calculated at the time of logging in and leaving work.

> **REMEMBER:** Before settling the working time of employees, it is worth verifying all fields to make sure that all records have correct start and end work hours - it may happen that someone forgets to log out when leaving work.

> **NOTE:** Only users with appropriate permissions can make changes to work schedule records.

Employees entered in the work schedule, who do not use or partially use the mobile application, can settle their working time in two ways:

Method I: Using the “batch method” that automatically fills in blank fields.



There are two options to choose from:

- **Fill in the end of work as planned if there is a start of work**: This applies to situations where the employee logged in at the start of work, but did not log out at the end or did so with a significant delay.
- **Fill in both the start and end of work as planned**: The start and end of work fields will be consistent with the range of hours specified for the working day.

Method II: By manually verifying the fields, regarding the supervisor’s reports about the employee’s work irregularities.

After finding the selected entry in the employee’s list, you need to make changes in it using the “Edit” action button.

Method III: If we fill in the schedule retrospectively, the working time is filled in to be consistent with the planned one.

> **REMEMBER:** The system marks in red the entries where there were irregularities related to the time or place of the employee’s login.

> **REMEMBER:** The settlement of the employee’s working time is possible only until the payment of the salary is transferred to the accounting department.

> **Example:** Monthly settlement of the working time of a field employee.

1. In the “CRM & Organizer → Employees” section, we click on the employee’s data to be settled.
2. In the record preview, we select the “Salary” tab and set the settlement date on the drop-down calendars, e.g. **September 1-30, 2023**.
3. We click on the blue “Search” field just above the table with records.
4. The system will display a string of days for a given month for a given employee, along with the name of the project, the time range, and the due salary amount assigned for each working day.
5. After expanding the field with the value “Amount of Remuneration”, marked with a red arrow in the screenshot below, a detailed scope of work will be visible, based on which the given rate was calculated.

Data	Projekt	Faktyczny Start Pracy	Faktyczne Zakończenie Pracy	Kwota Wynagrodzenia
4 wrz 2023 07:00 - 15:30	00008 / Amfiteatr Szczecinek (W trakcie realizacji)	4 wrz 2023 07:00	4 wrz 2023 15:30	» 175,00 zł

Faktyczny Start Pracy	Faktyczne Zakończenie Pracy	Zakres Prac	Kwota Wynagrodzenia
4 wrz 2023 07:00	4 wrz 2023 15:00	Akustyka	160,00 zł
4 wrz 2023 15:00	4 wrz 2023 15:30	Akustyka	15,00 zł

6. According to the above example, the employee received a remuneration rate in the basic dimension in the hours **7:00 - 15:00**, which includes the range of working day hours. However, **from 15:00 to 15:30** the remuneration rate was calculated according to the settings for the range of work that exceeds the number of working day hours, but fits within the working day hours. The sum of both amounts constitutes the value of the settlement for the employee's working time on a given day.

7. We scroll down and review the monthly summary to make sure all days on the list have already been settled.

NOTE: If any days remain unsettled, the "Actual End of Work" and "Amount of Remuneration" fields will remain empty.

21 wrz 2023 07:00 - 15:30	00010 / Przychodnia Zdrowia Jaksice (W trakcie realizacji)	21 wrz 2023 07:00	21 wrz 2023 15:30	» 175,00 zł
22 wrz 2023 07:00 - 15:30	00010 / Przychodnia Zdrowia Jaksice (W trakcie realizacji)	22 wrz 2023 07:00		
25 wrz 2023 07:00 - 15:30	00008 / Amfiteatr Szczecinek (W trakcie realizacji)	25 wrz 2023 07:00	25 wrz 2023 15:30	» 175,00 zł
26 wrz 2023 07:00 - 15:30	00008 / Amfiteatr Szczecinek (W trakcie realizacji)	26 wrz 2023 07:00	26 wrz 2023 15:30	» 175,00 zł
27 wrz 2023 07:00 - 15:30	00008 / Amfiteatr Szczecinek (W trakcie realizacji)	27 wrz 2023 07:00	27 wrz 2023 15:30	» 175,00 zł
28 wrz 2023 07:00 - 15:30	00008 / Amfiteatr Szczecinek (W trakcie realizacji)	28 wrz 2023 07:00		
29 wrz 2023 07:00 - 15:30	00008 / Amfiteatr Szczecinek (W trakcie realizacji)	29 wrz 2023 07:00	29 wrz 2023 15:30	» 175,00 zł

8. For unsettled days, we edit the existing entries by clicking on the dates of these events.

21 wrz 2023 07:00 - 15:30	00010 / Przychodnia Zdrowia Jaksice (W trakcie realizacji)	21 wrz 2023 07:00	21 wrz 2023 15:30	» 175,00 zł
22 wrz 2023 07:00 - 15:30	00010 / Przychodnia Zdrowia Jaksice (W trakcie realizacji)	22 wrz 2023 07:00		

9. We fill in the forms paying attention to the "Planned End of Work", "Actual End of Work" and "Non-standard percentage salary rates" fields, which will change the final value for the daily work time settlement.

10. We save the data using the "Approve" button.

REMEMBER: After creating a list summarizing the employee's remuneration for a selected period of time, the administrator will be able to export it to an Excel file for import into an accounting program or another financial system. This permission can also be set, for example, to the role of an accountant.

Planner

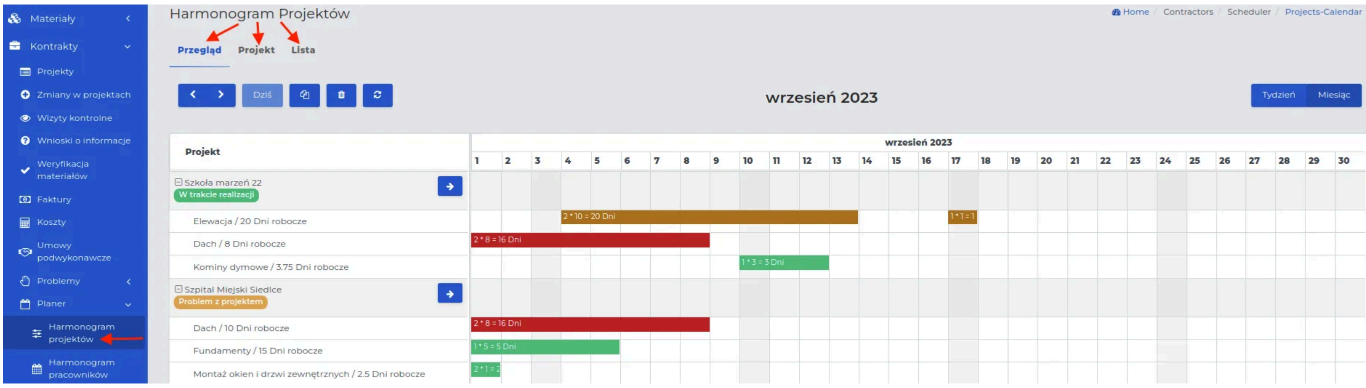
Regardless of the number of ongoing projects, the Contractors.es system allows you to register a work plan for each of them. The graphical representation of the planner in tabular form is clear and transparent. The Planner module has been divided into categories related to the projects themselves or those directly related to the employees delegated to the selected construction site.

Project schedule

The project schedule allows you to set a work time calendar for each project in the system. The created "Project Schedule" allows you to look at each of the projects:

- what has been planned for a given project (scope of work),
- what is the planned time for the implementation of individual stages of work,
- how many workers have been assigned to these tasks.

> **NOTE:** By default, all users have access to the project schedule, but only those with appropriate permissions can create events on the calendar.

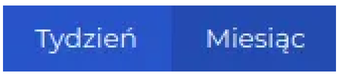


Depending on your needs, you have the option to use three tabs, each containing specific system functions.

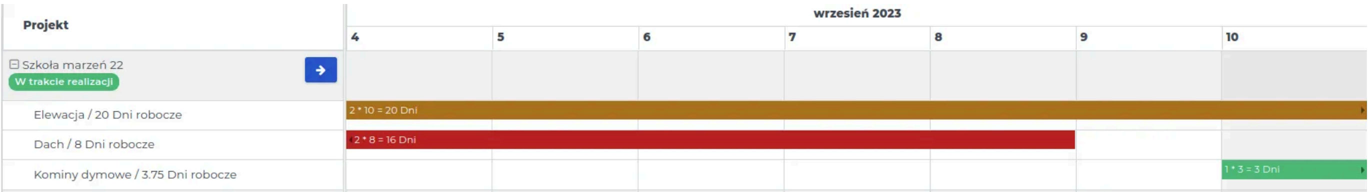
I. "Overview" tab.

These are settings related to how the calendar is presented on the user's desktop.

1. Determination of the time interval (Week or Month) using one of the buttons:



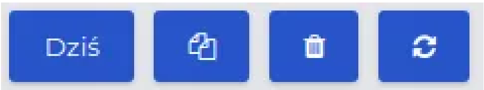
- Weekly view of the calendar.



- Monthly entry of events on the calendar.

2. Both ways of presenting the calendar, both weekly and monthly, can be moved on the desktop using navigation buttons, which allow you to move both back and forth through the following weeks or months.

3. The remaining function buttons above the calendar respectively mean:



- **“Today”:** After pressing this button, events occurring in the time interval (weekly or monthly) will be displayed on the desktop, taking into account the day with today’s date.
- **“Copy”**: Allows you to copy a given cell from the calendar table and paste it elsewhere.
- **“Trash”**: Allows you to delete a selected entry from the event table.
- **“Refresh”**: Updates the schedule view (in case of simultaneous editing by more than 1 person).

> **REMEMBER:** The copy function remains active until it is deactivated by clicking on the icon again. In this way, you can paste the same task multiple times on different days.

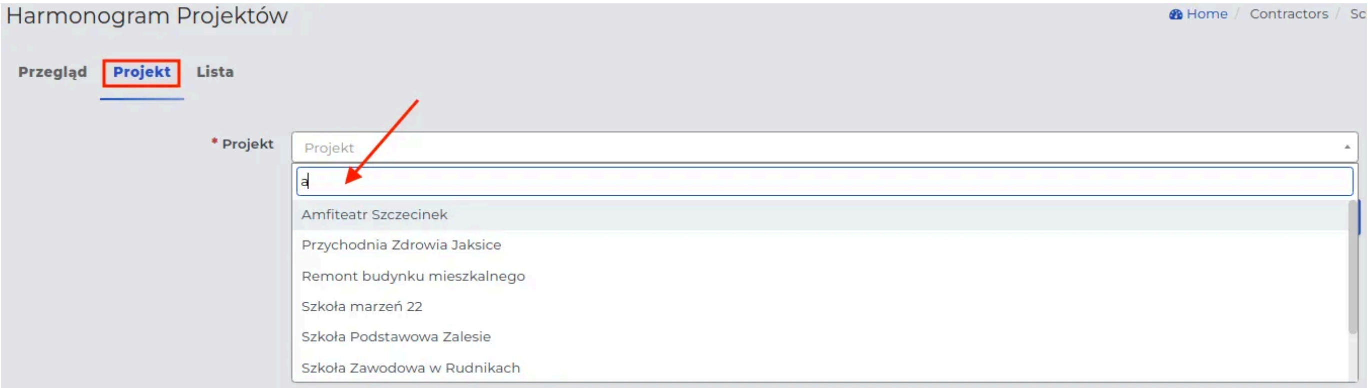
> **NOTE:** The copy function in the form leaves settings related only to the number of planned workers assigned to another range of work. The number of workdays always remains at **“1”** and can be changed by editing the form, available by clicking on its name with the mouse cursor.

> **NOTE:** The selected cell in the calendar table can also be deleted by clicking on its name and then selecting the “Delete” button in the upper right corner.

> **REMEMBER:** The “Arrow” button allows for quick navigation between different tabs related to a given project on the list.

II. “Project” Tab.

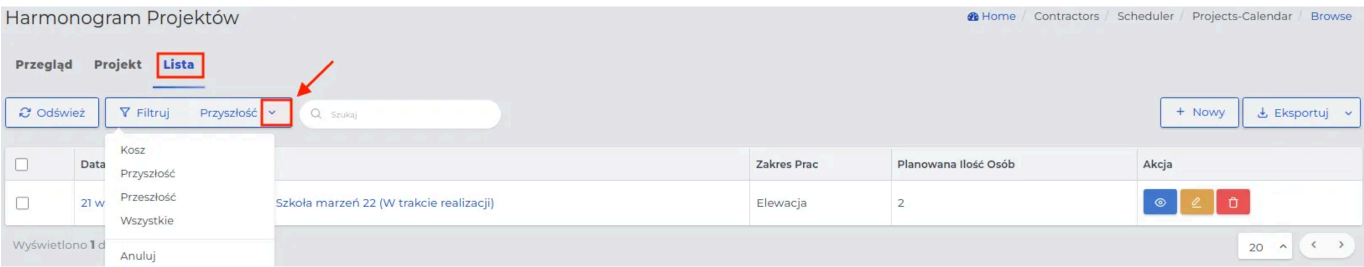
Allows the user to find any project in the system by typing the initial letter or syllable in the “Project” field. After making a selection, a calendar of events related to it will be displayed on the user’s desktop.



> **NOTE:** By selecting another project name from the drop-down list, you will go to its schedule preview.

III. “List” Tab.

These will be events defining the ranges of work on all projects. The system will automatically display only those events on the list that have been scheduled. Thanks to the record filtering function, marked with a red arrow in the screenshot below, it is possible to define a time interval for events on “Future, Past and All”.



> **REMEMBER:** The ranges of work located in the "Trash" can be restored to the list by the **administrator** using the "Restore" action button. They are not permanently deleted from the system. They will reappear on the "active" list in the group with the appropriate time interval.

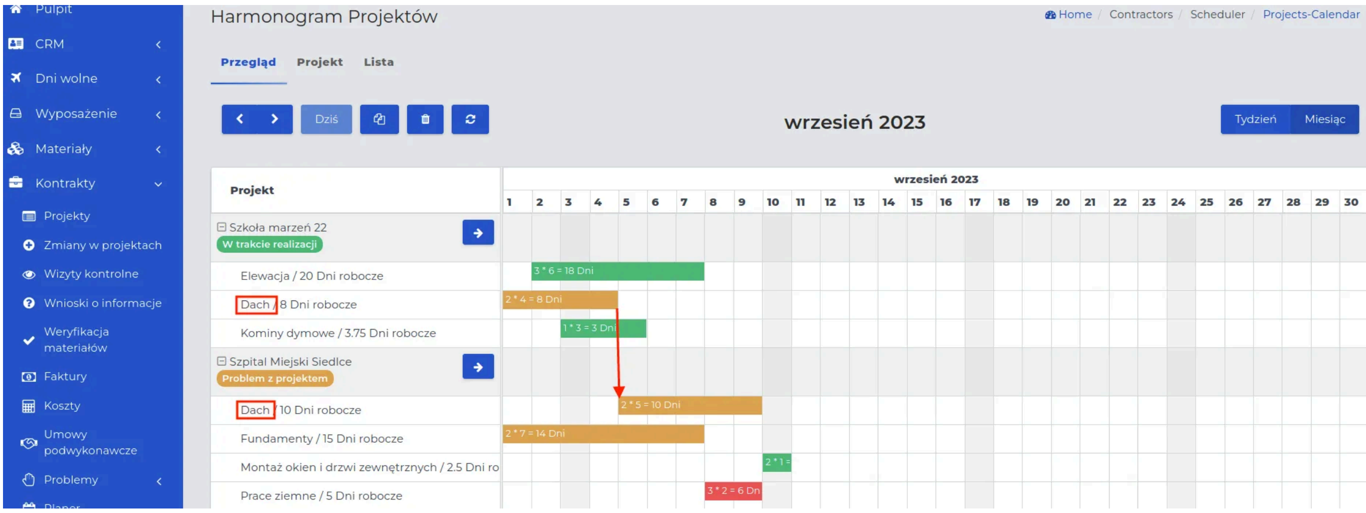
Entering work scopes into the schedule

Thanks to the capabilities offered by Contractors.es, you can effectively plan the organization of the scope of work, ensuring continuity of working days for employees and efficient implementation of projects according to the schedule.

Example illustrating the completion of the work schedule while maintaining the continuity of employee working days.

Two workers started working on the roof construction on a project that was to last 4 working days. On the fifth day, they were assigned to another job related to roof construction, but on a different project. The graphical placement of colorful chips on the work schedule is a useful tool, facilitating organization and ensuring full use of available dates in the calendar.

The end date and resumption of work for these workers is marked on the screenshot with a red arrow.



You can determine the time and labor resources allocated for a given scope of work in ongoing projects in two ways.

Method I: By adding a new event to the list of already entered work scopes.

1. In the "Contracts → Project Schedule" module, go to the "List" tab.

2. Above the list of entries, click on the "New" button and fill out the form, the meaning of the fields is as follows:

- **Start:** Enter the start date of the planned scope of work.

- **End:** Determine the deadline by which the scope of work should be completed.

- **Project:** Select the name of the project for which you want to add an entry to the planner.

> **NOTE:** Only those projects are available on the list, for which work scopes were specified during the creation of the estimate.

- **Planned number of people:** Indicate how many workers are to carry out a given scope of work.

3. Save the data using the “Confirm” button.

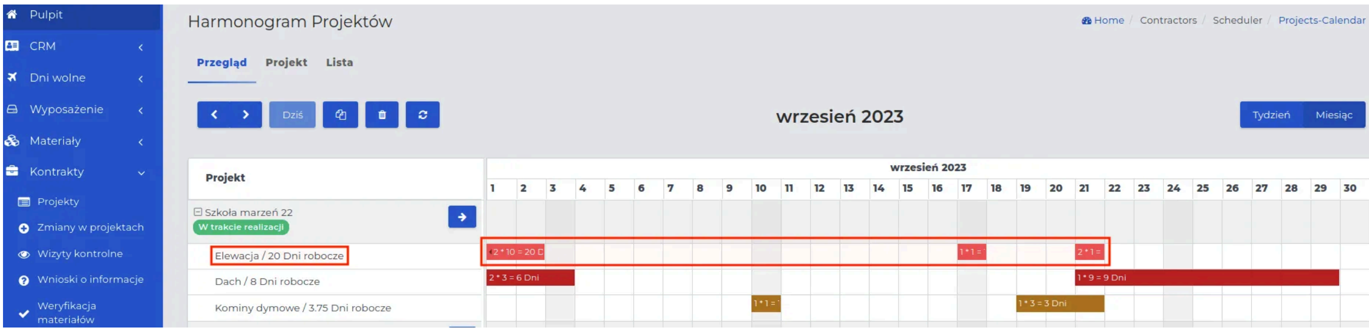
Method II: Directly from the project calendar, displayed on the screen desktop.

1. Go to the “Contracts -> Project Schedule” section and select the project to which the changes are to apply.

> **REMEMBER:** If you have many ongoing projects, use the function to search for them on the planner using the “Project” tab.

2. Optionally, change the time interval for the way the work schedule is displayed, using the “Week” or “Month” buttons.

3. With the selected range of work, make sure how many working days have been planned for this range of work when creating the estimate. This information is marked with red fields in the screenshot below.



> **REMEMBER:** The total number of workdays marked on the calendar for a given range of work should match the number of days given in the estimate. All days allocated for a given range of work add up.

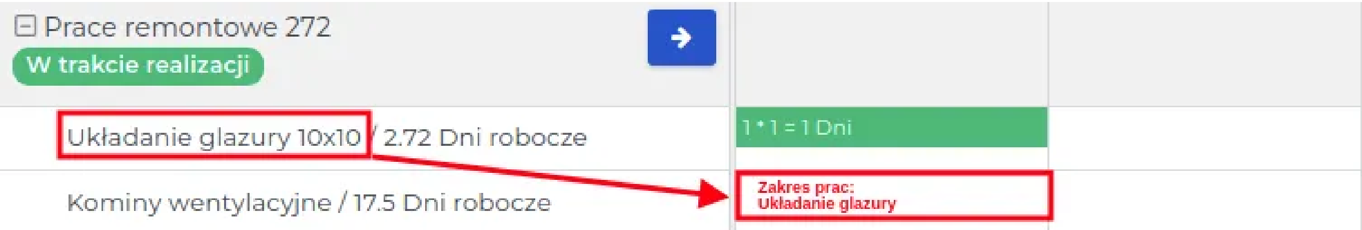
> **NOTE:** The number of workdays for a given range of work should take into account the total number of working hours of all employees delegated for this time.

4. Click on the selected field in the calendar and fill out the form according to the description of the fields given in **Method I.**

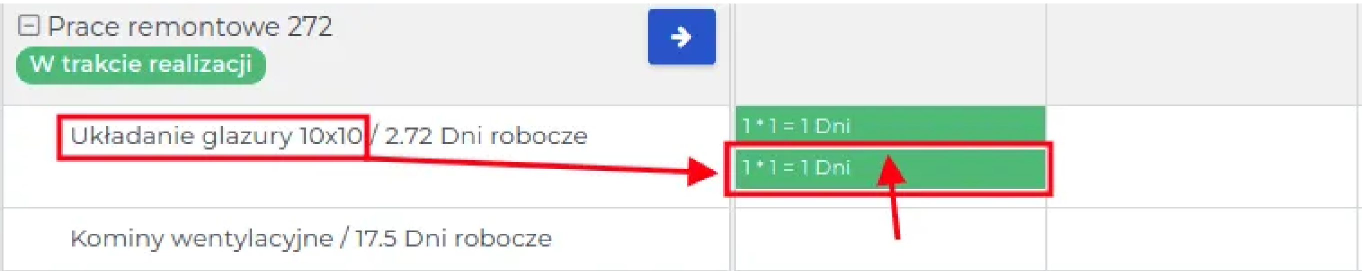
> **NOTE:** If you change the name of the range of work in the table row to another, the values associated with this range will appear in the row corresponding to this name.

Changing the name of the range of work will not delete the existing entries, but will only place them in the appropriate place in the table.

- The selected range of work will be assigned to the appropriate row, even if the name of this range differs from the name of the row in which the selection was made.



- The selected range of work will be taken into account in the appropriate row, according to the name of this range.



5. Save the entered data using the “Confirm” button.

Example: Entering a work schedule for the execution of external elevation.

The following conditions were established in the estimate:

- **Execution time:** 20 working days.

- **Number of workers:** 2.

1. According to the recommendation, the number of working days of all workers we send to the construction site to perform the elevation should add up to the total number of workdays specified in the estimate. If we assume in the estimate that the execution of the elevation requires **20 working days**, and we assign **2 workers** to the construction site, then the sum of their working days should be **20 days** (2 workers * 10 days = 20 days).

2. After clicking on the appropriate place in the schedule, we fill in the fields according to the scheme:

- In the “Planned number of people” field, we enter the value **“2”,** indicating the number of workers who will be assigned to this scope of work.

- In the “End” field, we enter a date that is **10 days later** than the start date given in the “Start” field. For example, if the start date is **01-04-2024**, the end date should be **11-04-2024.**

3. We save the entered data using the “Confirm” button.

NOTE: The fields being filled in are given appropriate colors, which depending on the degree of correctness in relation to the entered estimate appropriately indicate:

- **Green fields** - the data fits within the assumption (the estimated working time is lower than planned).
- **Orange fields** - the data slightly exceeds the assumed threshold (the estimated time is close to the assumed one).
- **Red fields** - the data exceeds the assumption (the estimated working time is higher than planned).

> **REMEMBER:** Simply entering the number of workers for a given scope of work does not automatically assign them to a specific task on the construction site. The detailed way of filling in the work schedule is described below.

Editing the project schedule

Moving events in the table allows you to control the stages of work and fill in the free spaces with those scopes of work that do not collide with currently ongoing tasks.

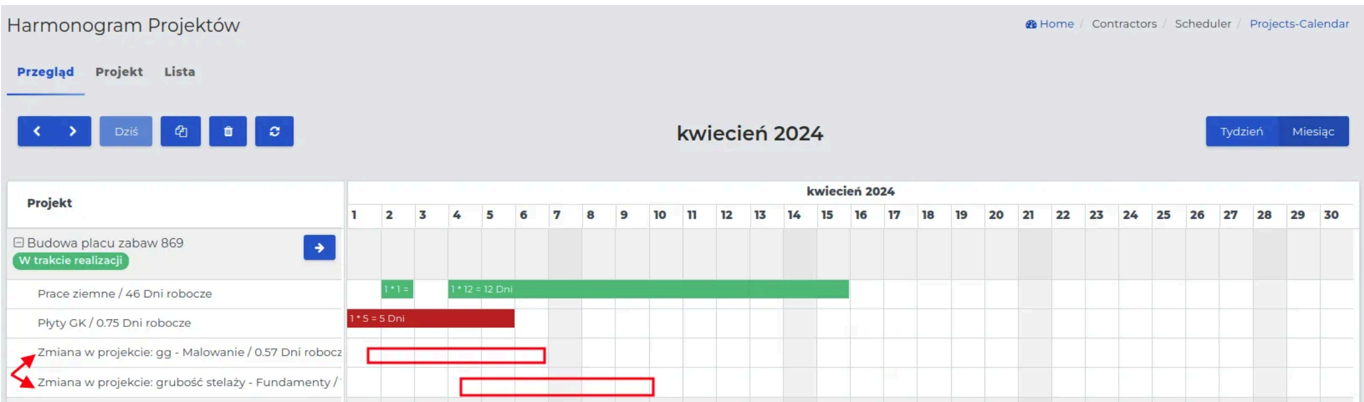
The data entered in the project schedule can be edited in two ways.

Method I: By directly previewing the selected scope of work in the table.

1. Select the appropriate scope of work on the project calendar that you want to modify.

> **REMEMBER:** You cannot change the scopes of work given in the estimate for already ongoing projects.

> **NOTE:** If there is a need to add a new scope of work for an ongoing project, please use the “Contracts → Changes in projects” section and submit a new application. After it is accepted, the scope of work will appear on the project list.



2. Click on the card marked in green, orange, or red.

3. In the preview, use the "Edit" function button and make changes in the form, then save them using the "Confirm" button.

Method II: By dragging the table cells in the calendar, the settings of which you want to change.

1. Select the range of work for which you want to change the settings or size in the calendar table.

2. If the change is only to move to another place without changing the content of this field, grab the given field with the cursor and drag it to the destination.

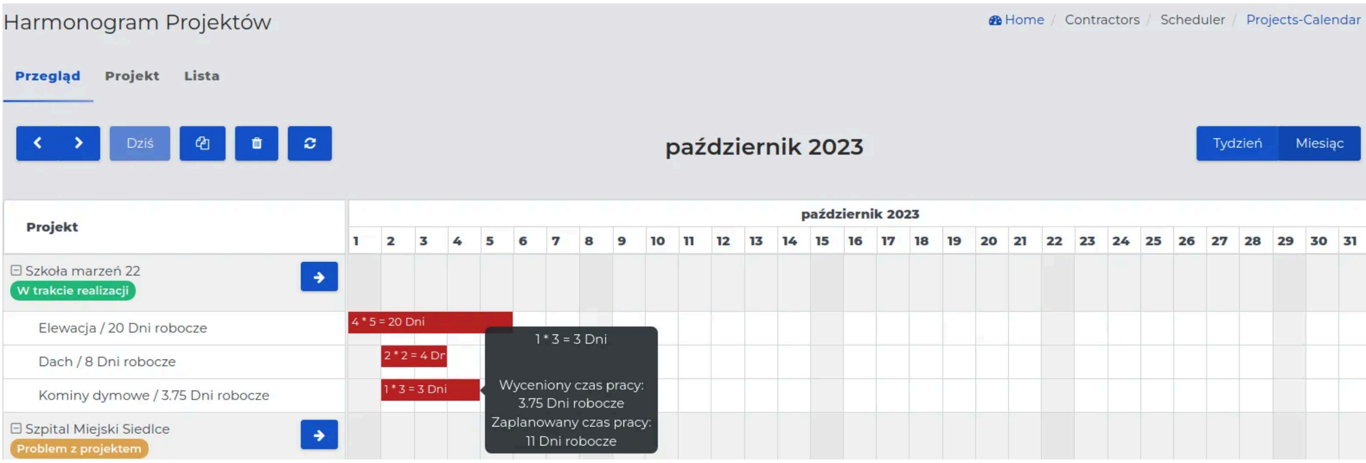
REMEMBER: Moving a field will change the planned working time for this range of work, to which the table cell has been moved.

NOTE: The moved field disappears from the place where it was. If you want the value in this field to remain unchanged, you must use the "Copy" function for this field in the calendar.

3. If you want to change the width of the field in which the duration of a given range of work is specified, grab the appropriately selected side of the edge (right or left side of the cell), reduce or increase its width and release the cursor.

NOTE: When you change the width of fields, the system automatically fills in the values according to the data entered in the form. The number of workers will remain unchanged, the number of days will change according to the dragging of the field to the right or left side on the calendar.

NOTE: If work on a given project has been suspended and will be resumed at a different time, the current number of days that have been allocated for the implementation of this range of work will be included in the total amount of "Planned working time" visible on the black field of the screenshot below.



REMEMBER: Resuming work in the next month will sum up the number of days worked so far in previous months, also including planned work days.

Employee Schedule

The work schedule allows you to assign selected employees from the list to a specific project, taking into account the day of the week and their working hours.

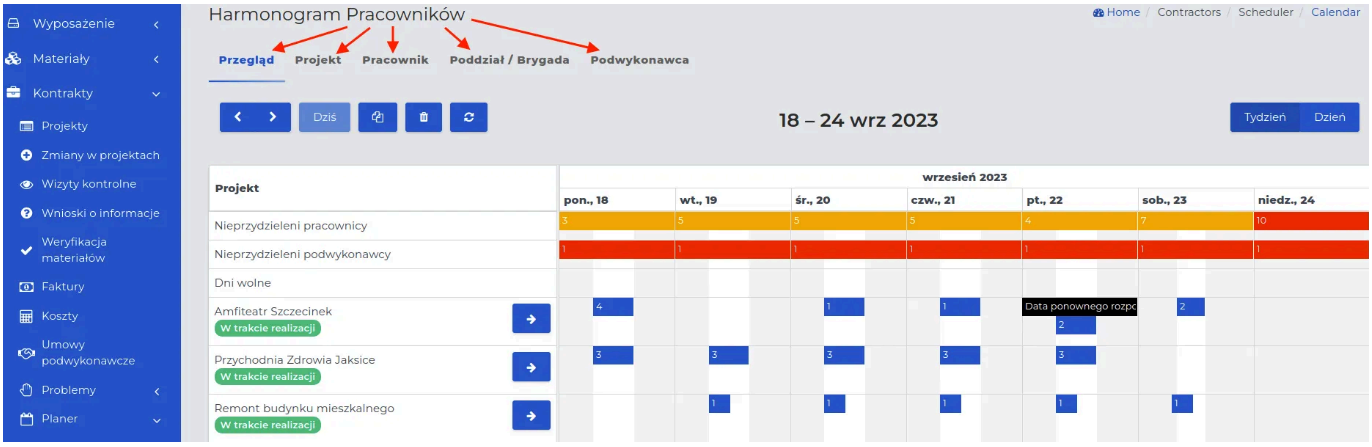
Thanks to the employee work schedule feature, a given employee can:

- be assigned to different workplaces, e.g. he can work at two different construction sites in a week.
- be on several projects in one day, e.g. in the morning he can lay paving stones in one place, and in the afternoon lay floor tiles in another place. These events can be one-time or continuous.

The graphic calendar conducted in this way, with color-coded fields, is clear and readable. Thanks to free coordination and easy changes in the table cells, working with this module is simple and does not cause problems.

> **REMEMBER:** Adding an employee to the schedule automatically sends a notification to the mobile application, informing him about the date and place of work.

> **NOTE:** Notifications are sent only to employees who have an account in Contractors.es and have the mobile application installed on their phone.

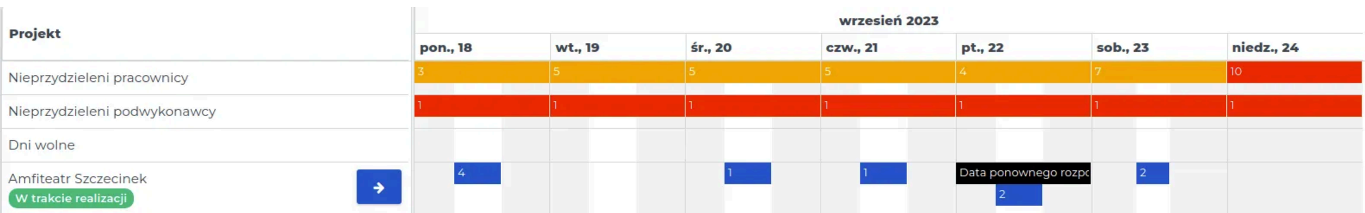


Depending on your needs, you have the option to use five tabs, containing specific system functions.

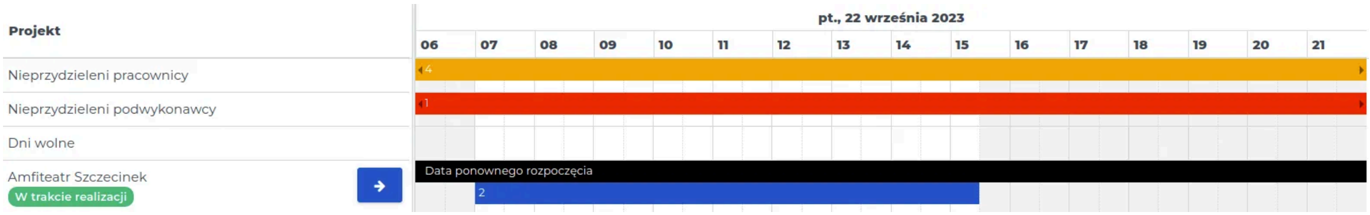
I. “Overview” tab.

These are similar settings as described for the name of this tab in the “Project Schedule” section.

- Weekly entry on the employee schedule.



- Daily recording of events on the calendar.

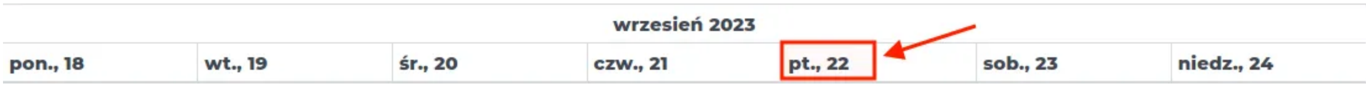


Above the list of projects in the calendar for each day, the quantities have been marked:

- **Unassigned employees** - how many employees have not yet been assigned to work.
- **Unassigned Subcontractors** - how many subcontractors we have “free”. If all are busy, this field will not be visible.
- **Free days** - planned employee vacations.

Thanks to the above indicators, the user can easily monitor the availability of employees and subcontractors and identify free days in the work schedule. This facilitates planning and prevents potential conflicts related to the availability of human resources.

> **REMEMBER:** To display the employee work schedule for a selected date, just click on the appropriate date on the calendar displayed on the desktop.



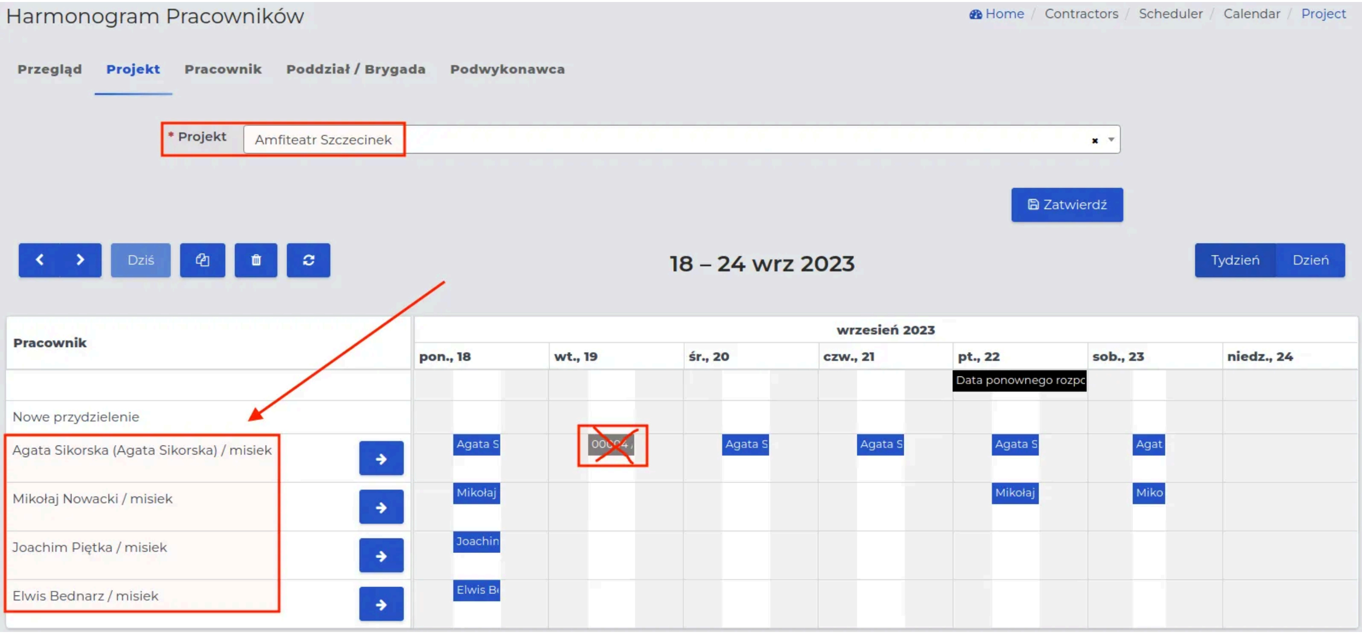
II. “Project” Tab.

It allows the user to find any project in the system by typing the initial letter or syllable in the “Project” field. After making a selection, the employees assigned to it will be displayed on the user’s dashboard.

> **NOTE:** By selecting another project name from the drop-down list, you will go to its schedule preview.

Example illustrating the assignment of employees to a selected project from the list.

For the Amfiteatr Szczecinek project, **four employees** have been assigned to work, which is marked with a red arrow in the screenshot below.



REMEMBER: Assignments for specific days of the week, related to the selected project, are marked in blue.

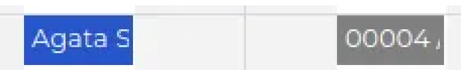
According to the assignment made, you can notice that:

- On the first day, all employees have to show up at the construction site.
- On the second day, only employee Agata Sikorska was assigned to work, the others were not assigned to any task on this project.

NOTE: Employee Agata Sikorska was assigned to another project because the assignment is marked in a different color than blue.

- On the following days, some employees were assigned, and some were not.

REMEMBER: When you hover over one of the fields, information about the project to which the selected employee has been assigned will be displayed.

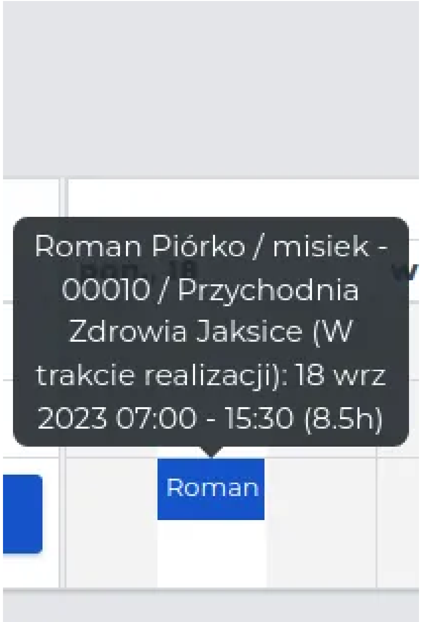


III. “Employee” Tab.

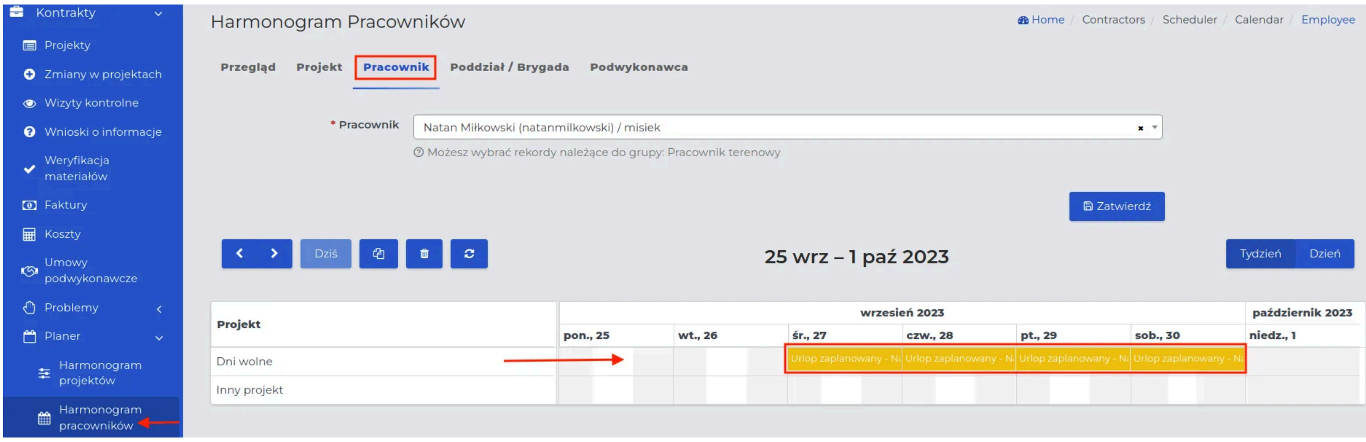
It allows the user to find the work schedule of any employee in the system, by typing the initial letter or syllable in the “Employee” field.

NOTE: Only records belonging to the “Field Worker” group are available on the list.

When you hover over a selected day of the week, in addition to information about the ongoing project, the working hours of a given employee will also be displayed. The example is shown in the screenshot below.

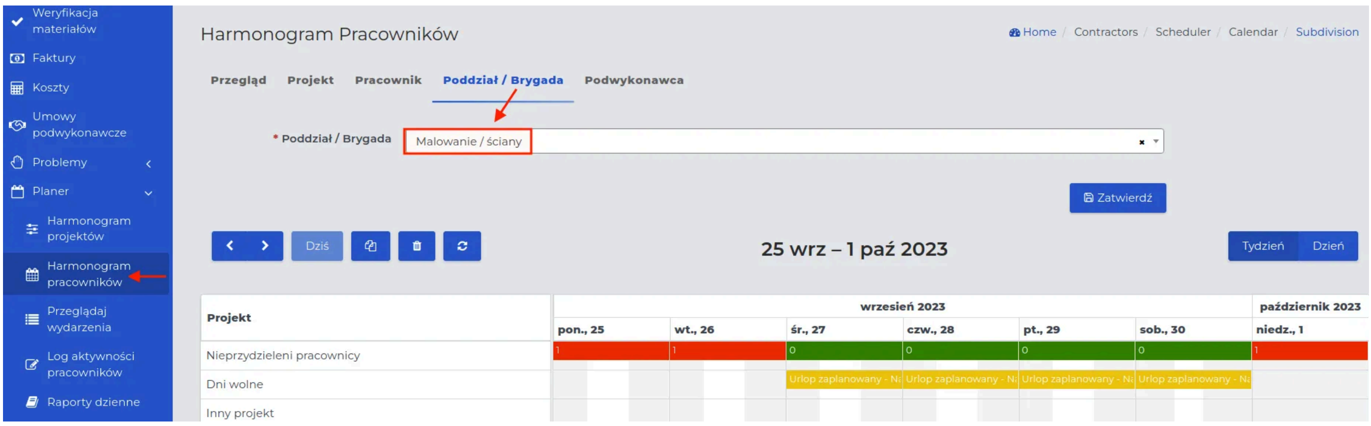


The employees' schedule will continue to display not only their work assignments but also previously planned days off. In the row marked "Days off", marked with a red arrow in the screenshot below, there are days of planned leave.



IV. "Subdivision / Brigade" tab.

Using the search engine, you can find the work schedule of a specific worker brigade. You can add workers to "Subdivisions and Brigades" by editing the employee's contact - the "HR" tab.



If the project is to be started by employees of a given brigade, it is worth using the described tab to be able to:

- Check the number of employees already assigned to work from a given department, for whom their assignment is determined by colors in the “Unassigned employees” row:
    - **Red fields** - indicate employees who are not yet assigned to any scope of work. You can select them for the project and assign tasks to them.
    - **Green fields** - indicate employees who already have tasks assigned on the calendar. You can change the project for them, but make sure you also fill in the number of employees in the place from which they are transferred.
- Check the number of days off planned by employees at a given time in the “Days off” row. By hovering the cursor over a given day of the week, you will see the data of the employee who will be absent at this time.
- Determine the names of projects to which a given department has been assigned. They are visible when you hover the cursor over the selected field.

V. “Subcontractor” tab.

If you regularly cooperate with a given subcontractor, it is worth marking on the calendar the dates when they are to appear and the type of work they are to perform. In the case of contracts with a subcontractor settled according to the “time and material” scheme, you will count his payment in this way. Otherwise, you will collect information that may be useful, e.g. to determine who exactly was on the construction site on a given day.

Creating a work planner for field workers

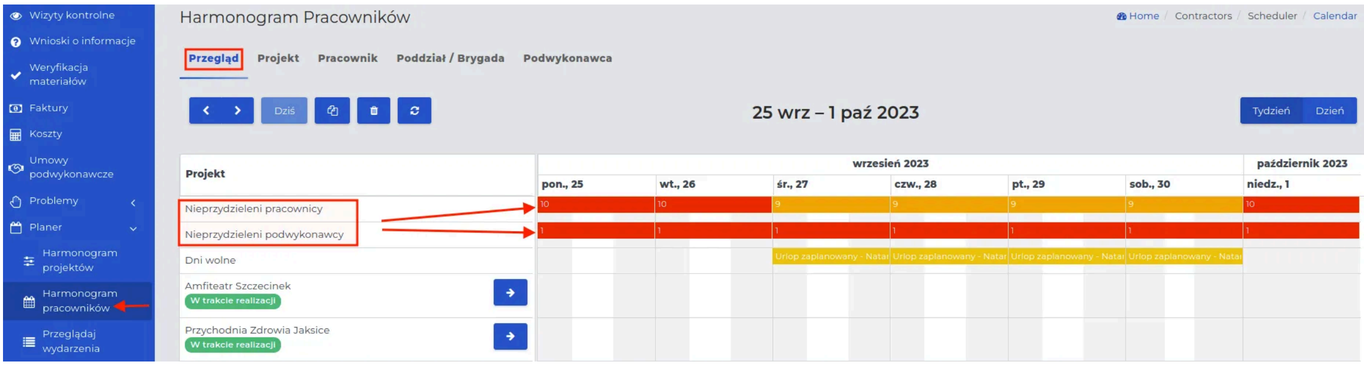
You can fill in the work calendar for workers in three ways.

Method I: Directly from the calendar view, which contains a full list of all work assignments.

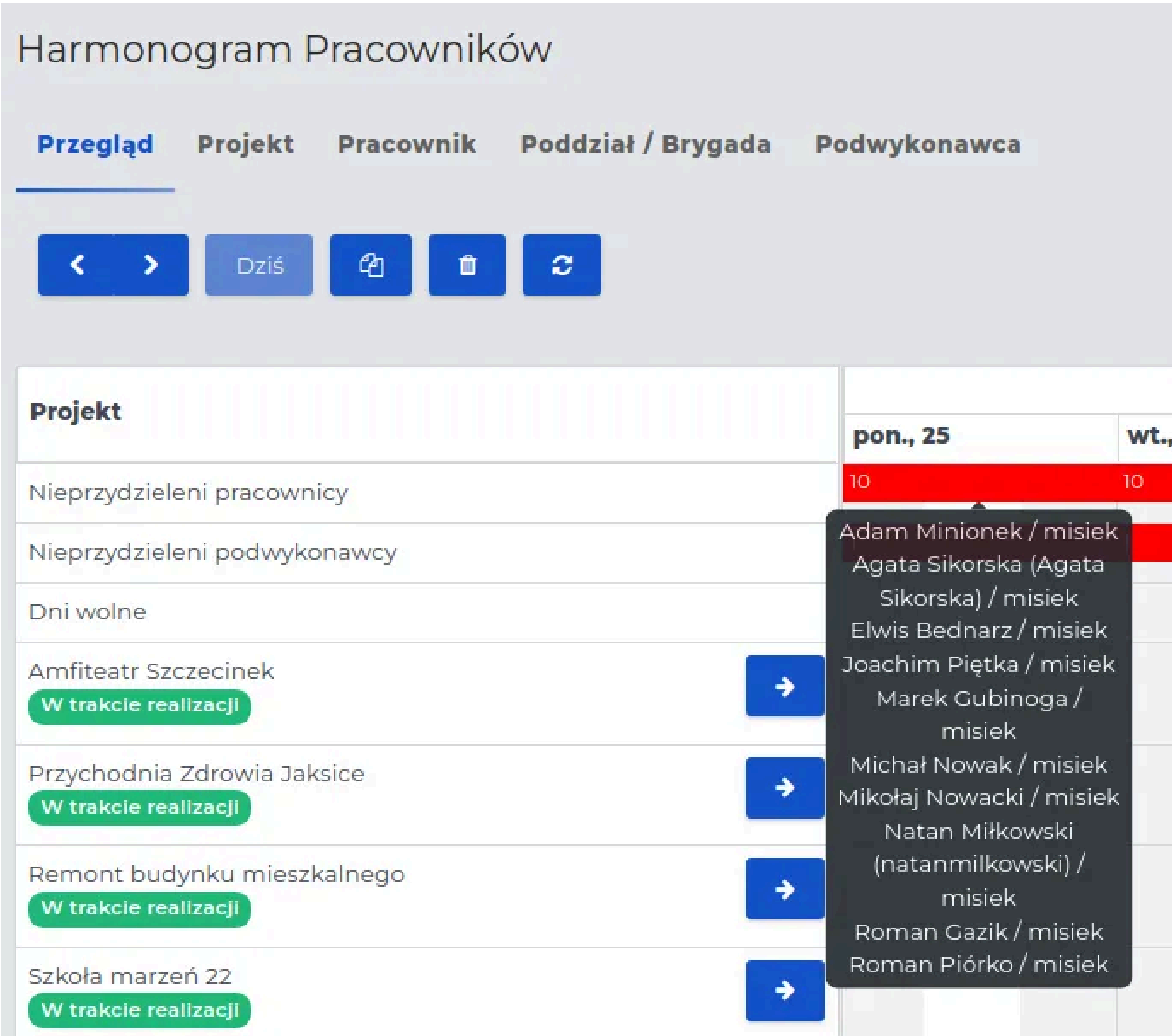
This is a method that allows you to browse all ongoing projects on the calendar, where employees are assigned to specific scopes of work. Thanks to the graphical representation of the calendar, you can clearly plan work for the remaining employees who have not yet received an assignment.

1. Go to the “Contracts → Planner → Employee Schedule” menu and select the project for which the assignment is to be made.
2. Click on the blue arrow next to its name to preview the existing entries.

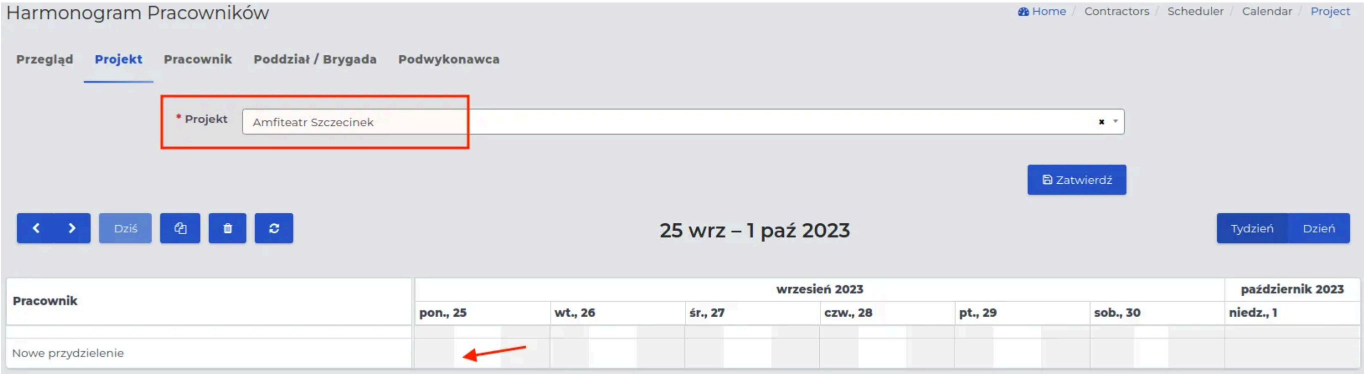
> **NOTE:** Pay attention to the availability of human resources in the cells marked with red arrows, which can be assigned to a given project.



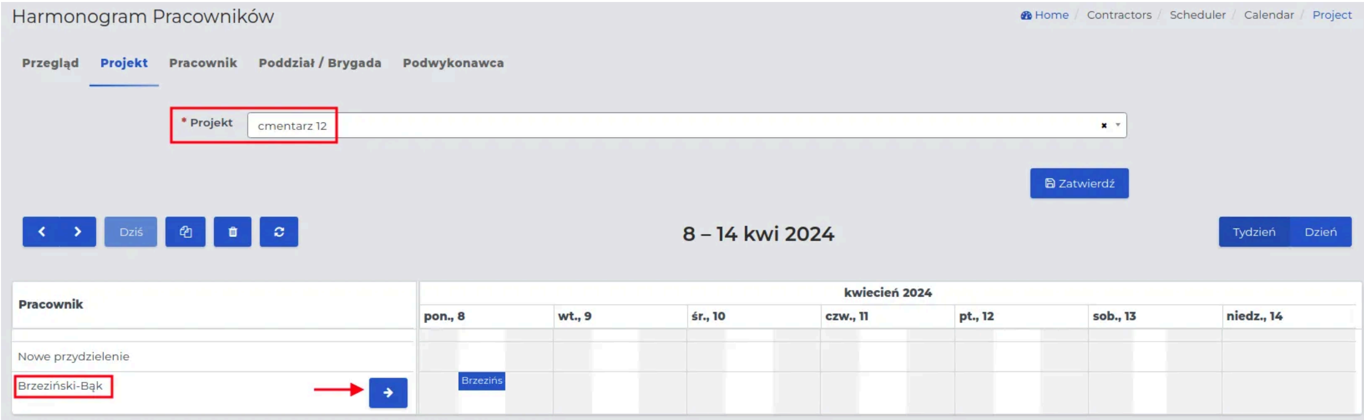
REMEMBER: When you hover your mouse cursor over a cell specifying the amount of unassigned workforce yet (fields: Unassigned employees, Unassigned subcontractors), a list of people for whom you can make a work assignment will be displayed.



2. In the “New assignment” row, click on the selected date.



NOTE: If a subcontractor has been assigned for the selected project, an entry with his name and schedule will be visible under the “New assignment” row, which can be viewed using the blue arrow.



3. Fill in the displayed form, the meaning of the fields is as follows:

- **Scheduled start of work:** The day work begins.
- **Scheduled end of work:** The day work ends.

NOTE: You can enter a one-day assignment and only later drag it to the right on the calendar to the date that is to mark the end of work. You can also use the copy and paste function.

REMEMBER: The time range for the start and end of the workday is calculated based on administrative settings for default employee working hours. You can extend the working hours of employees, but overtime pay will be appropriately calculated according to “Non-standard percentage rates”.

NOTE: Changing the date on the calendar will automatically enter the assignment on the schedule in the cell with the newly selected term.

- **Lunch break:** This is an unpaid additional break during work. Depending on the country and company policy, it may be disabled by the administrator.

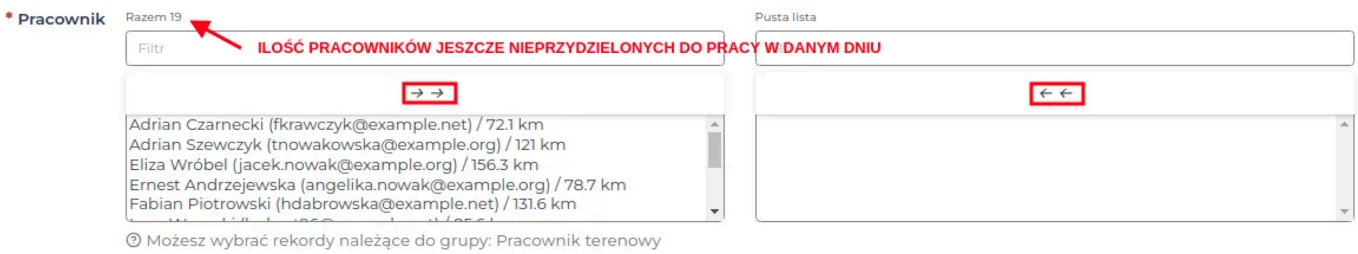
- **Project:** Choose the project name to which you want to assign the workforce.
- **Scope of work:** Define the type of work the employee is to perform.
- **Subcontractor:** For employees, leave the option “No”.
- **Department:** Optionally, select the department responsible for the chosen “Scope of work”.

> **REMEMBER:** If you choose “Department”, you will limit the list of employees who are simultaneously assigned to it and are field workers. Lack of department selection will allow for the choice of all field workers who have not received an assignment within a given time frame.

- **Employee:** Click with the cursor on the employees for whom you want to make an assignment.

> **NOTE:** For each employee, their current location in relation to the address selected from the project list is visible.

> **REMEMBER:** If you want to select all employees from the list, use the arrows located above the list. Arrows pointing in the opposite direction allow the return of employees to the “available” list.

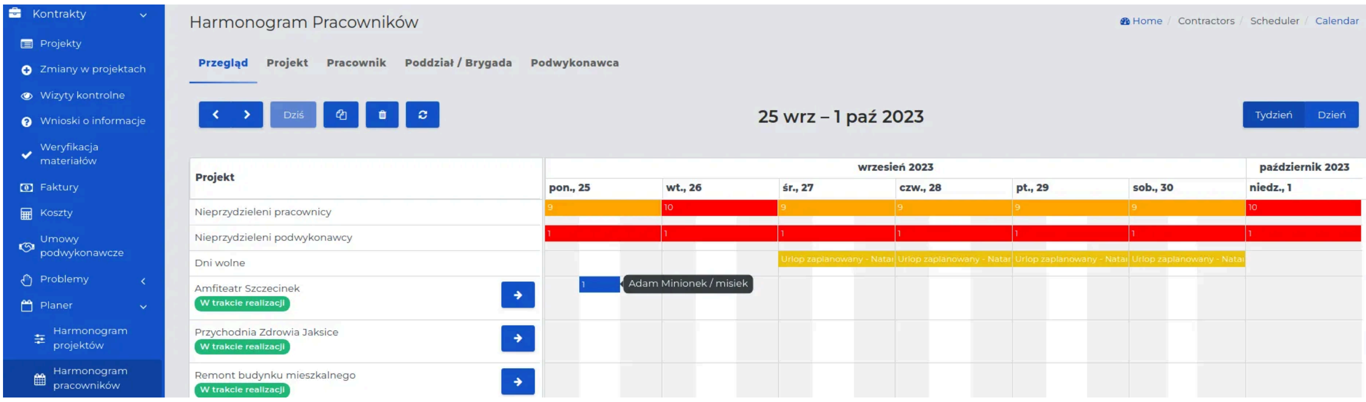


- **Non-standard percentage wage rates:** If you have agreed with the employee on a particular day that you will pay differently, you can change the wage settings.

- > **Note:** Additional description, information regarding the created work assignment.

4. Save the entered data using the “Confirm” button.

After entering one employee on the work calendar according to the scheme described above, the employee schedule will look as follows:

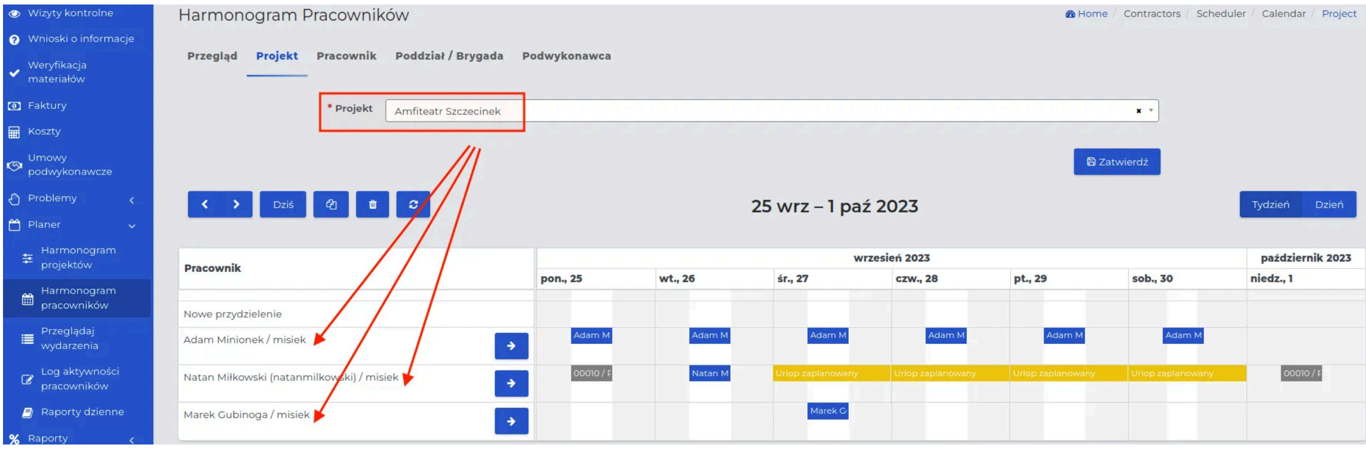


Method II: By selecting a specific project from the list, for which you want to make a work assignment.

This is a method that allows you to quickly and clearly fill the project work schedule with the human resources available to the company.

1. Go to the “Planner → Employee Schedule” menu and in the “Project” tab, search for the project in which you want to plan the working time for employees.

2. The list will show the previously entered employee work schedules. You can edit or delete them.



3. Click with the cursor on the “New assignment” row and fill out the form according to the field description given in **Method I.**

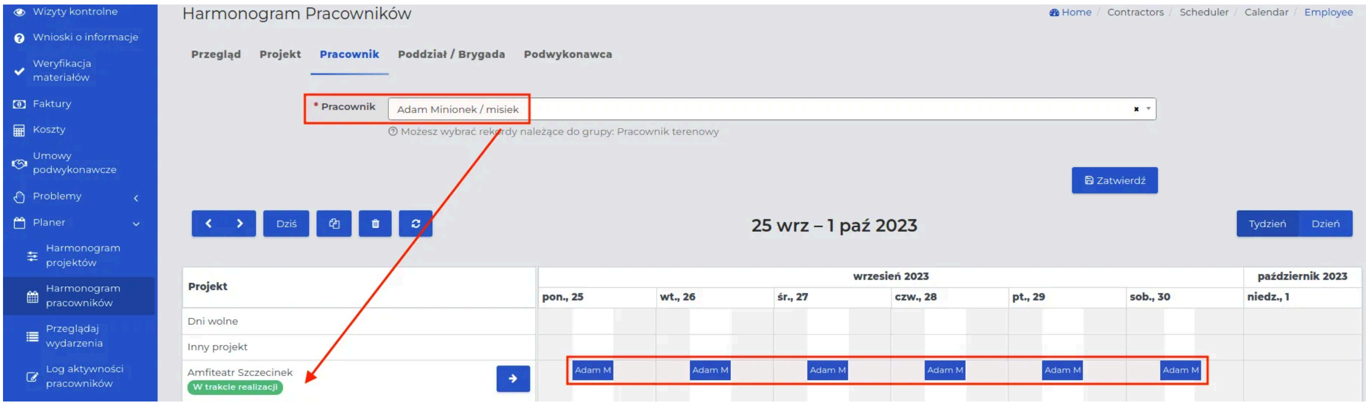
Method III: From the work schedule preview of a selected employee from the list.

Using this method allows us to monitor the current location of the employee, his current tasks for the next few days, and the creation of new work schedules.

1. Start the process the same way as in **Method II,** but this time select the “Employee” tab.

2. Then search for a specific person for whom you want to create a work schedule and create it according to the repeatable procedure.

3. You can edit or delete his visible current work assignments.



4. Save the entered data using the “Confirm” button.

Assignment to two different projects during the day

An employee can be assigned to work on two projects at different hours of the same day. If he is dealing with specialist tasks that do not require a full day in one place, you can set a work schedule for him in the following order:

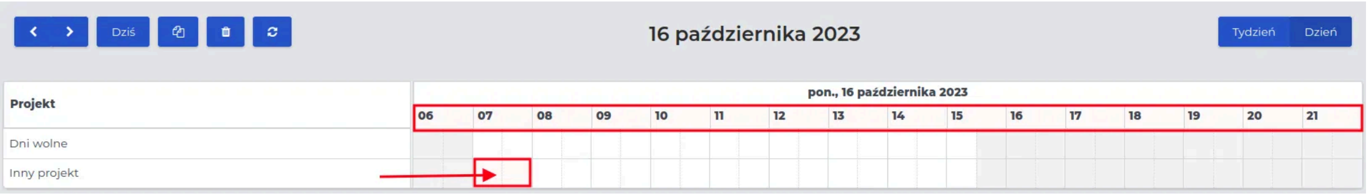
1. Go to the “Employee” tab in the “Contracts → Planner → Employee schedule” section and search for the employee you want to enter a split workday for.

> **NOTE:** If the employee has already received an assignment on a given day, you can edit it by changing the place or time range.

> **REMEMBER:** Changes to the employee schedule are only possible for days with a future date.

> **REMEMBER:** When planning work assignments between distant projects, consider the time the employee needs to travel between them. You can include this time in the previous project, the next one, or take a break between projects (you don’t pay for travel).

2. Click on the date on the calendar for the first assignment, and then specify the start time.



3. Fill out and save the form according to the description available here, remembering to specify the end time.

4. Add another assignment to the employee, taking into account a different start and end time of work. You can choose a different project and scope of work from the list.

NOTE: You cannot add new events during hours that have already been reserved by previously made work assignments for a given day, until the first assignments are modified.

NOTE: In the “Scheduled end of work” field, an hour corresponding to the total number of working hours of the day is automatically generated. Changing the end time of the workday, above the working hours of the day, will result in the charging of additional rates treated as “overtime”.

REMEMBER: You can also create a shared workday for crews by selecting the “Split/Crew” tab instead of “Employee” for the selected project.

Example: Division of an employee’s working time during one working day.

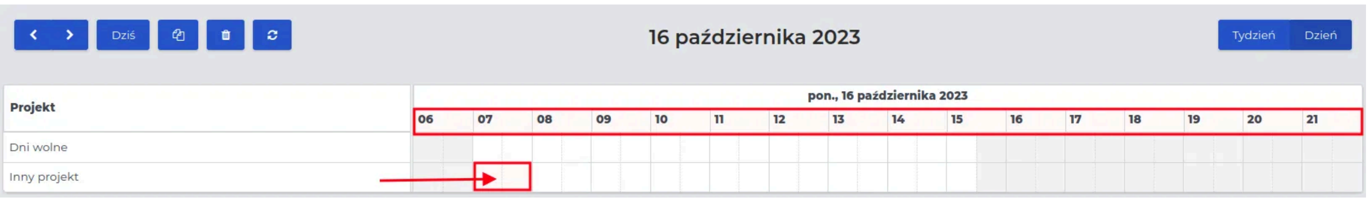
During a work week, the employee must appear on two different projects **60 km** apart to perform specialist work on each of them. Two time slots have been set: **7:00 - 12:00** and **13:00 - 17:00.**

To create a weekly work schedule taking into account the above assumptions, we proceed according to the scheme:

1. In the “Employee” tab available in the “Contracts → Planner → Employee Schedule” section, we find the person for whom we want to plan the work week in this way.

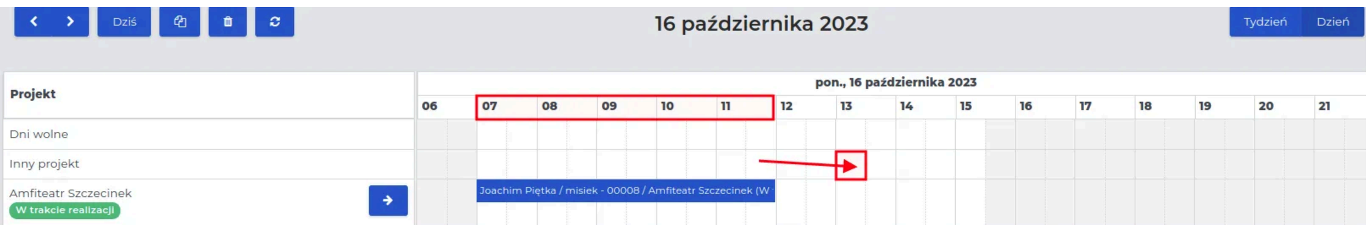
2. We click on the date on the calendar starting the work week, e.g. **October 16, 2023.**

3. In the “Other project” row for **7:00**, we click with the cursor and fill out the form, remembering to choose the first project name, scope of work, and end time **12:00.**

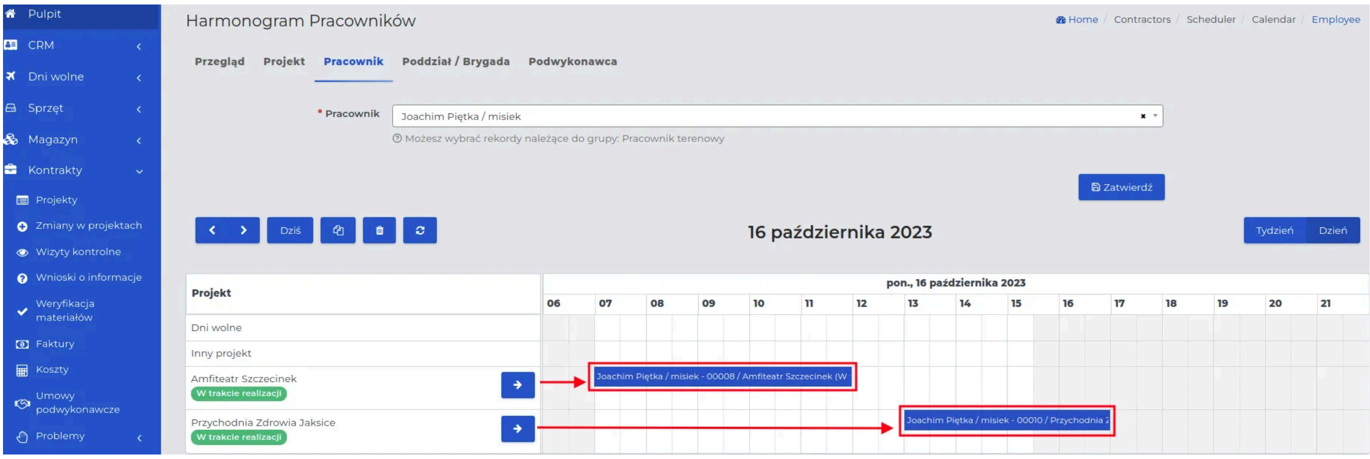


4. We save the data with the “Confirm” button.

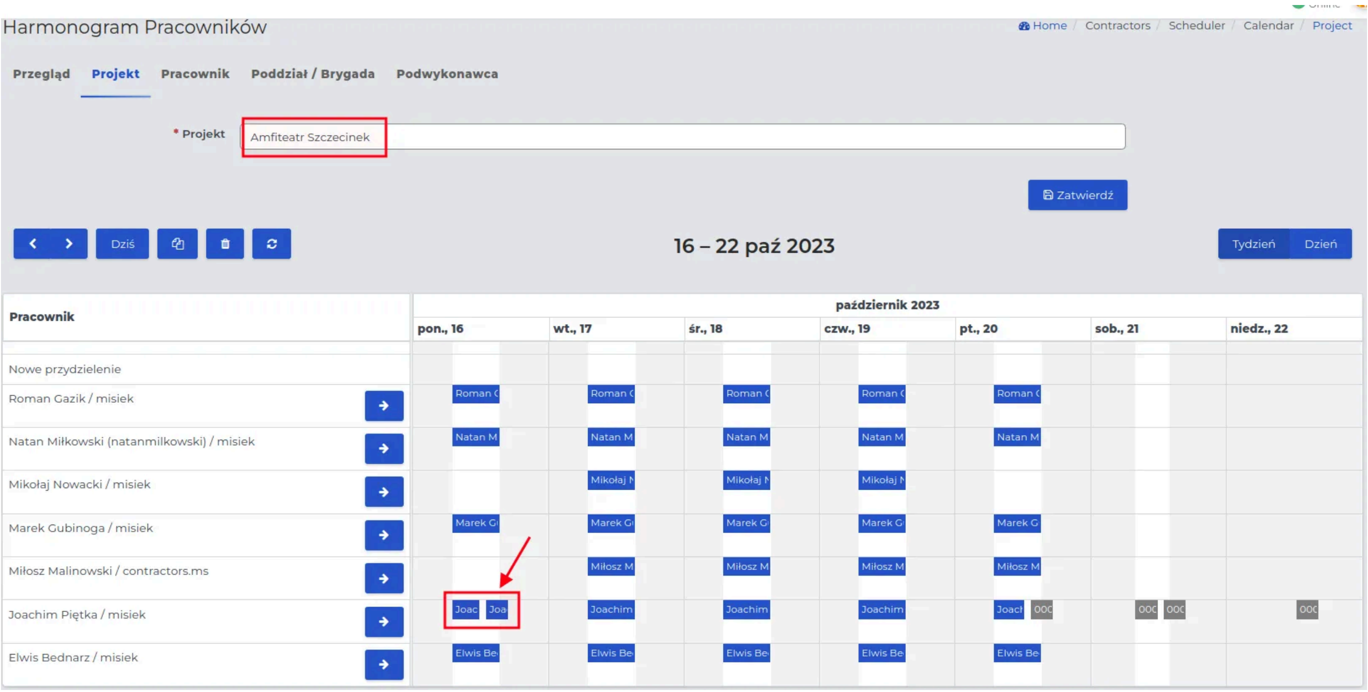
5. In the schedule, we make an entry in the same way for the second interval, specifying in the form the start of work at **13:00**, the second project name, the scope of work, and the end time **17:00.**



6. In the preview of the work schedule entries for the selected employee, the created schedule will look as follows:

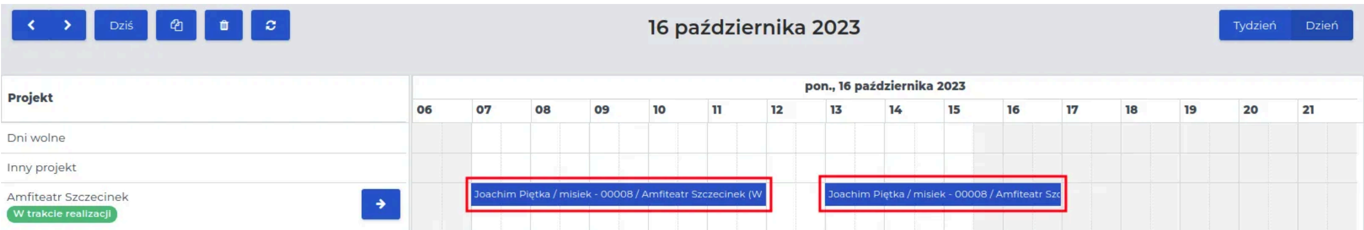


7. On the list of all employee assignments, a split workday entry for one of them will be marked as follows:



REMEMBER: If you want to adjust the duration of the assignment, you must edit one of them so that the employee's working time does not overlap on two projects at the same time.

NOTE: Shifting the work assignment to the same project will result in the removal of the existing entry on a project with a different name.

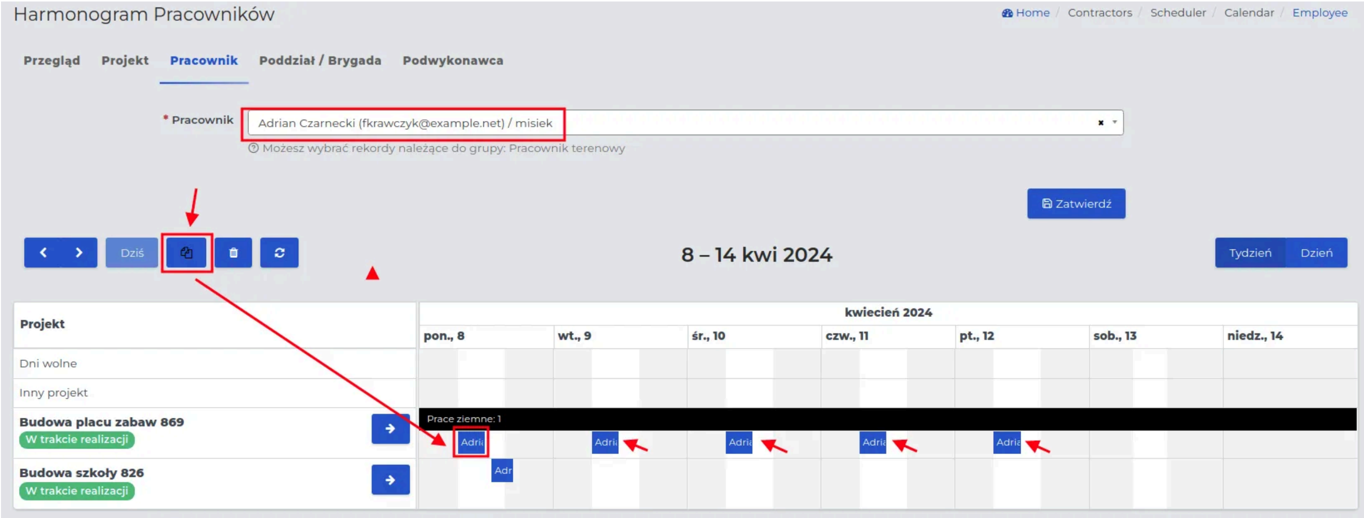


You can copy the created work schedule for the following days of the week as follows:

1. Open the preview of the work schedule selected from the employee list.

2. Click on the “Copy” function button and select the assignment you want to move to the following days.

3. Click on the next calendar fields, and the system will fill them with the copied entry.



> **REMEMBER:** The “Copy” function button is active until the icon is highlighted in gray. Until then, you can place the copied content in the calendar table.

4. Proceed in the same way with the second range of work.

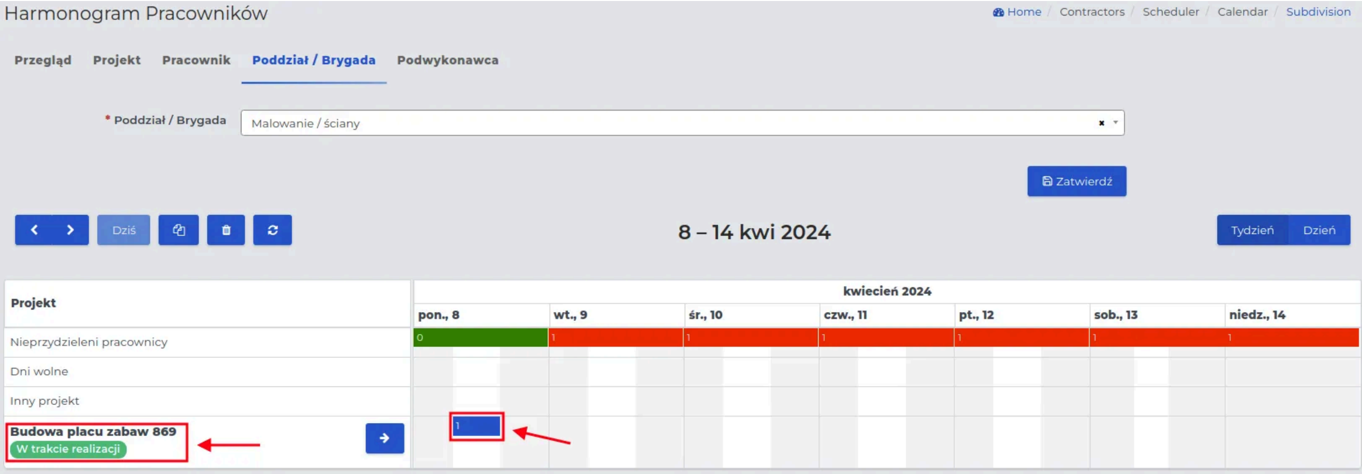
Adding a work schedule for the entire Brigade

For the entire Brigade delegated to the project, you can easily and quickly create a work schedule in which each employee from this brigade will receive a notification about the place and time of work. You do not have to search for each employee on the list and create an assignment for him. You can do this automatically, according to the description below:

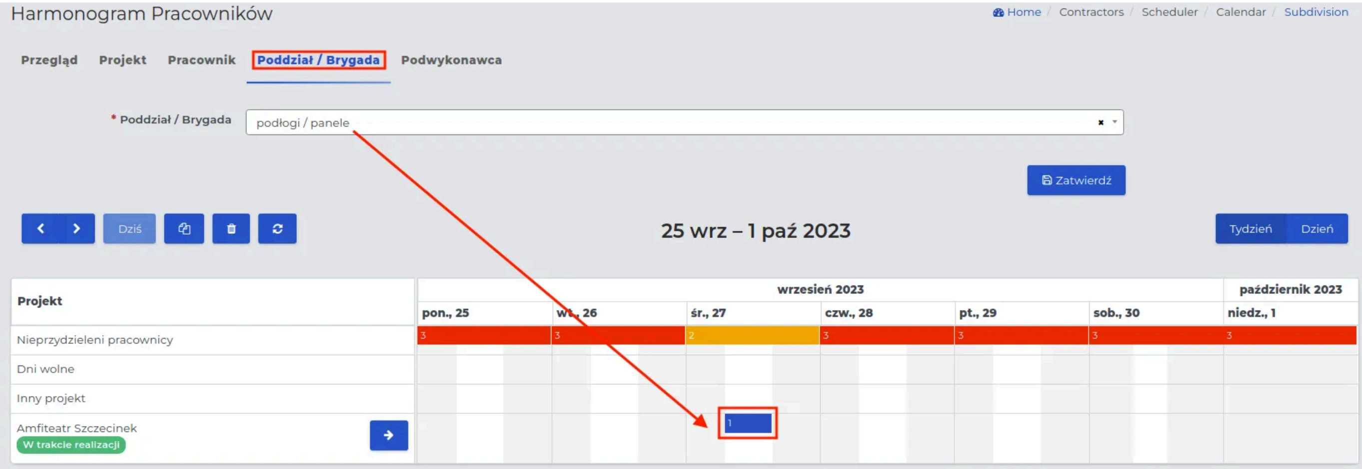
1. Go to the “Contracts → Planner → Employee Schedule” menu and select the “Subdivision/Brigade” tab.

2. Search for the name of the brigade for which you want to enter the work schedule e.g. painting/walls and save your choice with the “Confirm” button.

> **REMEMBER:** The system will automatically load the current work schedule of the members of the selected brigade. These can be both group entries and individual employee assignments that have been previously saved.



REMEMBER: When you hover over the blue field, the data of the employees who are subject to a different assignment will be displayed.

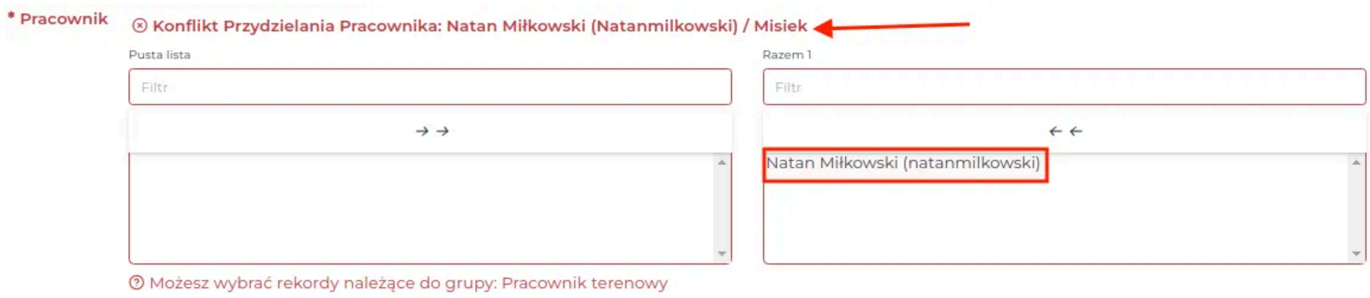


3. In the "Other project" row, select the date for the work schedule being created and click on it with the cursor.

4. Fill out the form, the meaning of the fields is repeatable, and save the data using the "Confirm" button.

REMEMBER: Check if the list of employees assigned to a given brigade in the system is correctly completed.

NOTE: If any employee from the selected brigade already has work scheduled on another project at the same time, the system will inform about the schedule conflict. Click on their name, and they will not be included in the work schedule being created.



REMEMBER: You can always remove an entry from the planner with an employee assignment and create a new assignment. Alternatively, you can also use the editing function in the entry preview to make changes and save them as new.

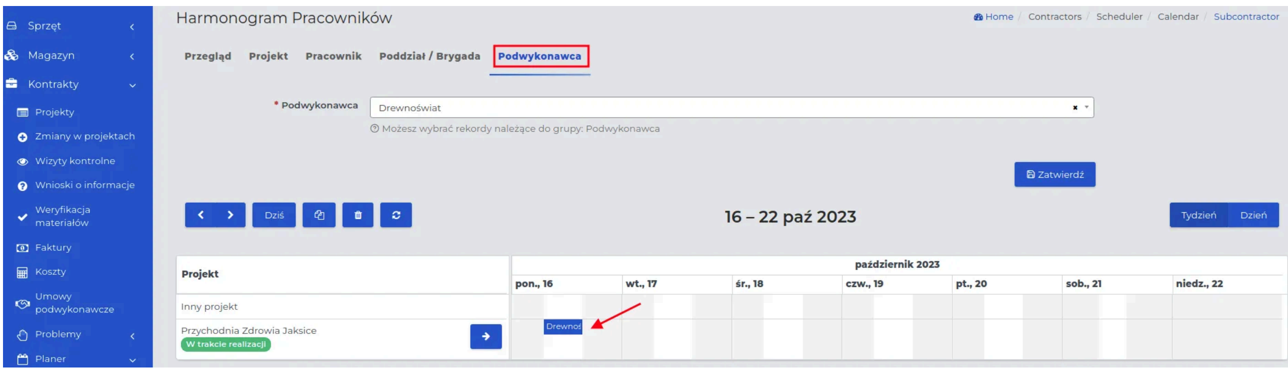
NOTE: When the number of employees in a given work brigade will be less than required to perform a specific scope of work, you can select employees outside the brigade. Make a new assignment for this project and scope of work, omitting the “Department” field in the creation form.

Creating a work schedule for a Subcontractor

For a project in which a subcontractor cooperating with you is to participate, you can create a work time schedule, which will be settled based on daily reports submitted by his foreman.

To create a work assignment for a subcontractor, follow the scheme:

1. Go to the “Contracts → Planner → Employee Schedule” menu and select the “Subcontractor” tab.
2. Search for their name in the list and save the selection with the “Confirm” button.
3. An optional work schedule for the selected subcontractor will be displayed on the dashboard, provided it has been previously entered into the system.



4. In the “Other project” row, specify the date for the assignment being created and click on it with the cursor.
5. Fill out the form, the meaning of the fields is repeatable except for the fields:

- **Subcontractor Agreement:** Choose from the list the agreement to which the work order applies.

> **NOTE:** If the field does not contain any agreements on the drop-down list, you must first attach an agreement to the selected project for it to be visible.

- **Subcontractor Foreman:** Specify the person responsible for supervising the work.

> **REMEMBER:** The "Subcontractor Foreman" does not simultaneously perform the function of a foreman in your subdivisions. This is a separate contact assigned to the company you are cooperating with.

- **Planned number of Subcontractor workers:** It is only important for contracts settled on the basis of "Time and material" for which the working time of workers will be multiplied by their quantity and the settlement rate.

6. Save the entered data using the "Approve" button.

> **REMEMBER:** The number of workers specified in the subcontractor work schedule creation form will be visible in the mobile application used for logging in at work (accounting for working time) and communication.

Changes in employee planners

In the work schedule calendar, you can make the following changes:

- completely remove the allocation,
- edit an existing entry,
- copy the record and paste it elsewhere,
- move the entry on the calendar.

I. Removing work assignments.

Using the "Trash" icon.

1. First, click on the icon.
2. Click the entry on the calendar that you want to delete.

> **REMEMBER:** You cannot delete records from the calendar table whose deadline has already passed and the employee was logged in at work (i.e., they have been recognized as already settled) or which are currently ongoing (when the employee is logged in to the project).

NOTE: The system automatically blocks editing or deleting from the database records that have been marked as settled by the button in the salary report. You also cannot delete records where the employee logged in at work - to delete such a record, you must first edit it and delete the employee's login hours.

REMEMBER: Leaving the "Trash" icon active (black fill on white) means that the record deletion function in the calendar is still enabled. Click again to disable the deletion mode.

Alternatively, you can drag and drop events into the trash.

II. Editing existing entries.

1. Select and click on the entry in the planner that you want to edit.

2. Use the "Edit" function button, make changes in the form and save them using the "Confirm" button.

REMEMBER: You cannot edit entries if the employee has already started work on a given day (e.g. logged into the application) or the assignment deadline is the current time.

III. Copying and changing the location of the copied entry.

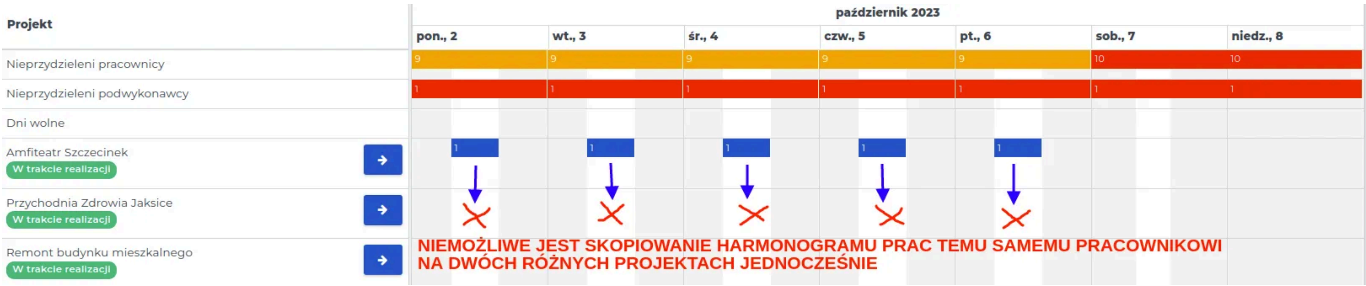
The system allows you to copy selected table records in two ways.

Method I: Using the "Copy" function button.

1. Click the "Copy" button.
2. Click on the assignment you want to copy.
3. Click on the chosen destination (date/project) where you want the selected entry to be copied.

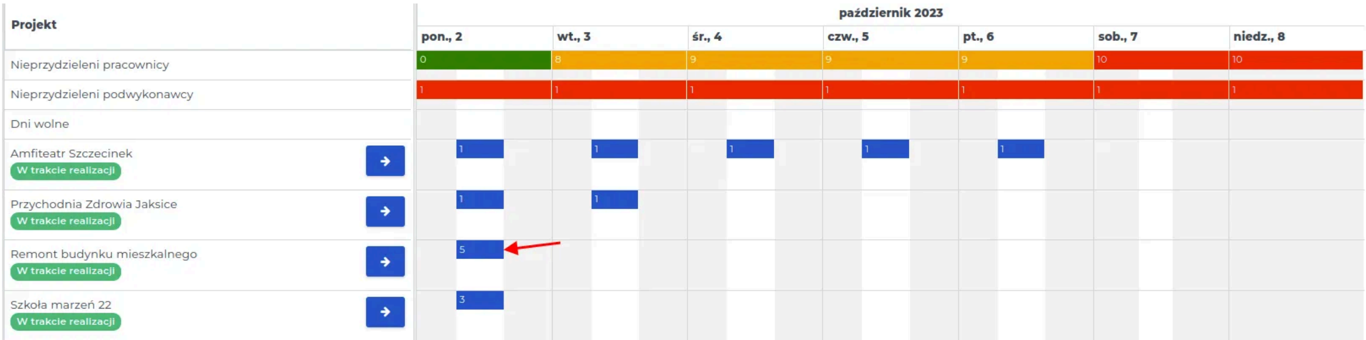
REMEMBER: Leaving the "Copy" icon active means that the record copying function in the calendar is still enabled. The record can be pasted multiple times. To change the copied record, click on another record.

REMEMBER: It is not possible to copy the selected record in order to create a work assignment for the same employee on two different projects at the same working hours.



Method II: By dragging the edge of the event.

1. Hover the mouse cursor over the edge of the field marked with a red arrow.



2. On the vertical edge of this field, an arrow symbol with two points (right-left) will appear, indicating the possibility of dragging the given cell in the chosen direction.

3. Release the arrow on the day of the planned work assignment end.

> **NOTE:** Copying assignments created for a given project for the entire work week of employees is possible by using the mass copying function.

In the case where the scope of work on a given project is to last evenly for several days, workers can be automatically assigned on the work calendar until the end of the week.

> **REMEMBER:** This method of bulk copying is only available for events assigned to one project.

III. Moving entries on the planner.

To move an entry on the planner, follow these steps:

1. Select on the planner the work assignment you want to change the place on the schedule.

> **REMEMBER:** You cannot move the workers’ schedule if the system has recorded the start of work.

2. Grab the assignment with the cursor and drop it at the target location.

3. The entry on the planner will be updated according to the change made.

> **NOTE:** This method allows you to move workers' assignments not only between days but also between projects.

Employee schedule based on valuation

The graphic table of the planner's calendar, on which we enter workers' assignments, clearly shows to what extent labor resources should be used to ensure continuity of work for each worker. Depending on the order in which the work scopes on the project were set, the selection of workers should also take into account their knowledge in the chosen field of work.

> **REMEMBER:** When setting work for workers, it is beneficial to create "Work Brigades" in the system beforehand. This way you can be sure that a given brigade is familiar with a specific scope of work and the time spent on their execution should be relatively profitable.

> **NOTE:** Each worker can only belong to one brigade.

> **REMEMBER:** A worker who has been assigned to carry out a project in a given work brigade cannot be re-selected for another project at the same time.

Creating a work schedule and assigning workers to the project, you will perform in the following order:

1. Create a valuation for the selected project.
2. Change its status to "In progress".

> **REMEMBER:** After changing the status to "In progress", further editing of "Work Scopes" will not be possible. Before changing the status, make sure that the entered work scopes are correct.

3. Go to the "Contracts → Planner → Project Schedule" menu and find it on the list using the "Project" tab.
4. Using the blue arrow, open a project preview in which a list of work scopes will be visible, consistent with those given in the quote.
5. Complete the "Employee Schedule" in the manner described here, taking into account the estimated number of days given in the "Work Scopes".

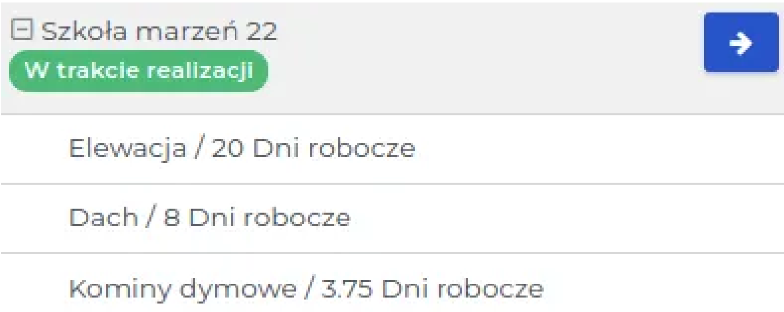
> **REMEMBER:** The implementation of "Work Scopes" should not exceed the "Estimated completion date" given in the project quote.

NOTE: If the given “Work Scopes” do not collide with each other and can be performed evenly, then set the “Work Time Schedule” to the maximum number of days given in the “Work Scopes”.

REMEMBER: If one work scope is related to the next, e.g. the screed must dry before tiles can be laid on it, then planning further work should always take this event into account.

Example: Creating a “Work Schedule” based on a quote “In progress”.

The quote created in the system includes three “Work Scopes”, for which the number of days allocated for implementation has been determined, illustrated in the screenshot below.



To complete the “Employee Schedule”, we proceed in order:

1. We check the planned project start date in the “Start Date” column, visible next to the project on the “Contracts → Projects” list.

   For our example, it will be **October 16, 2023**.

2. We determine the maximum day of work completion, taking into account their consistency. Our project should be completed within a maximum of **20 working days** (this is how many days were allocated for the longest work scope “Facade”).

3. We determine the number of workers for individual work days:

- ◦ **Facade:** 20 working days: 4 workers will work for 5 days (in the period **16-20.10.2023**).
- **Roof:** 8 working days: 2 workers will work for 4 days (within the period **17-20.10.2023**)
- **Chimneys:** 3.75 working days, 1 worker will work for 3 days (within the period **17-19.10.2023**)

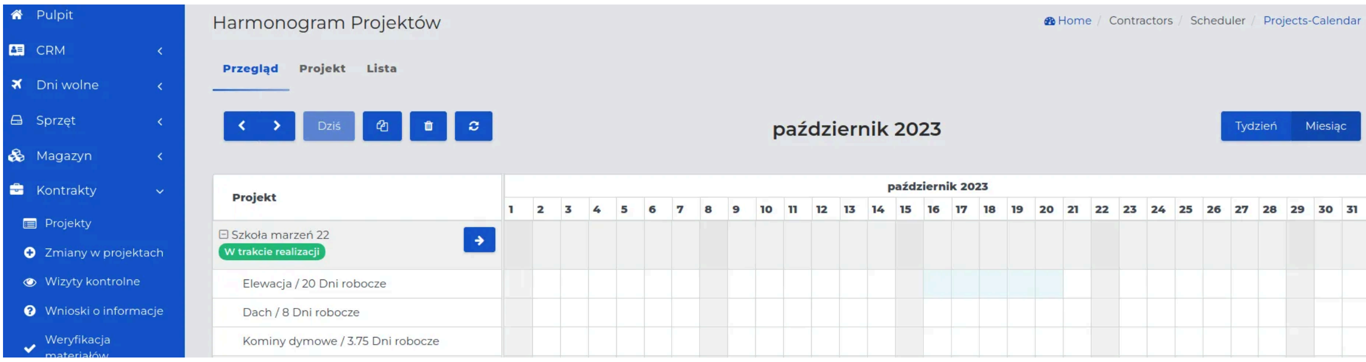
4. We open the “Contracts → Planner → Work schedule” menu and enter the above arrangements on the calendar. We can do this in two ways:

Method I: By holding and releasing the enabled cursor in the selected time range.

- for “Facade”, click the cursor on the date **October 16, 2023** and hold it until the date **October 20, 2023**. The selected time range will be light blue.

- release the cursor on the date **October 20, 2023** and in the displayed form fill in the number of workers, entering: **4.**

- for the remaining "Work Scopes" we proceed in the same way.



Method II: By clicking on the start date of work from a given range.

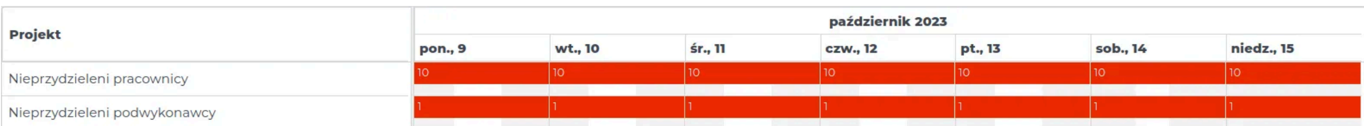
- for "Facade", click the cursor on the date **October 16, 2023** and fill in the form fields: "End date" by entering **October 20, 2023** and "Planned number of people", entering: **4.**

- for the remaining "Work Scopes", we fill in the schedule in the same way.

5. The created graphic table of the work calendar will look as follows:

6. We go to the "Contracts → Planner → Work schedule" section.

> **REMEMBER:** If this is the first project for which we are creating a schedule, the list of unassigned workers and subcontractors above the table will be full and marked with a red background.



7. In the "New assignment" row, click the cursor on the date **October 16, 2023** and fill in the form for the first work scope, setting:

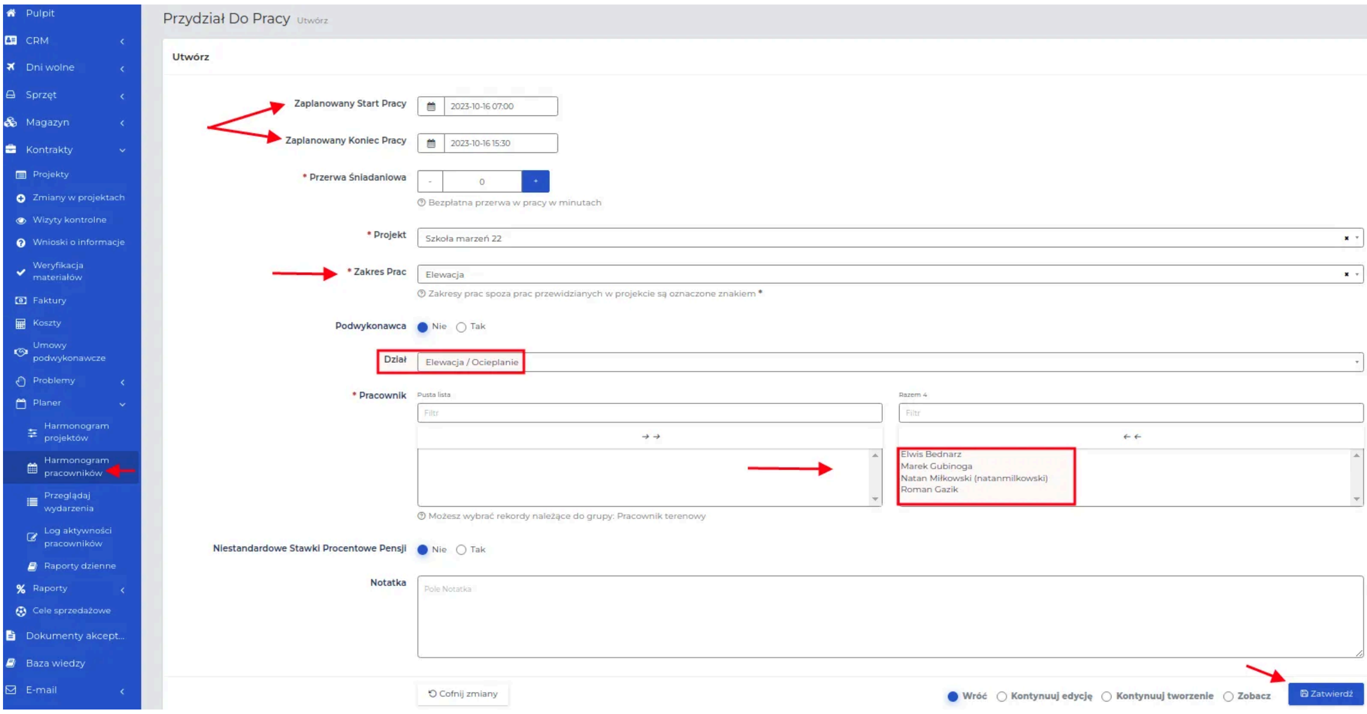
- **Work Scope:** Facade.

- **Department:** Facade/Insulation.

> **REMEMBER:** If you want to assign individual workers from the list, not the entire brigade, skip the “Department” field.

- **Worker:** We select and click the cursor on **four workers** belonging to the “Facade/Insulation” department.

> **REMEMBER:** The time range refers only to the specific day on the calendar where it is entered. We can only set a range of hours in it, without changing the date on the calendar. Leave the “Scheduled end of work” field unchanged.

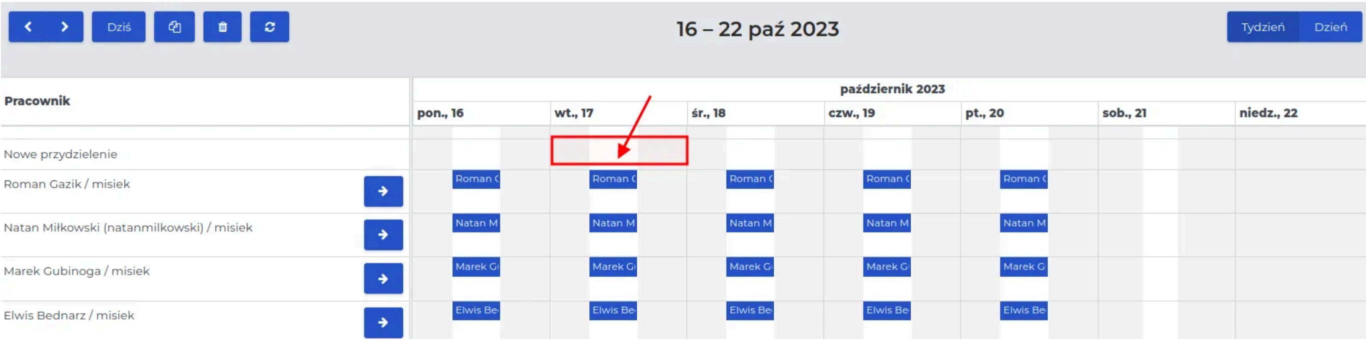


8. Save the form by clicking “Confirm”.

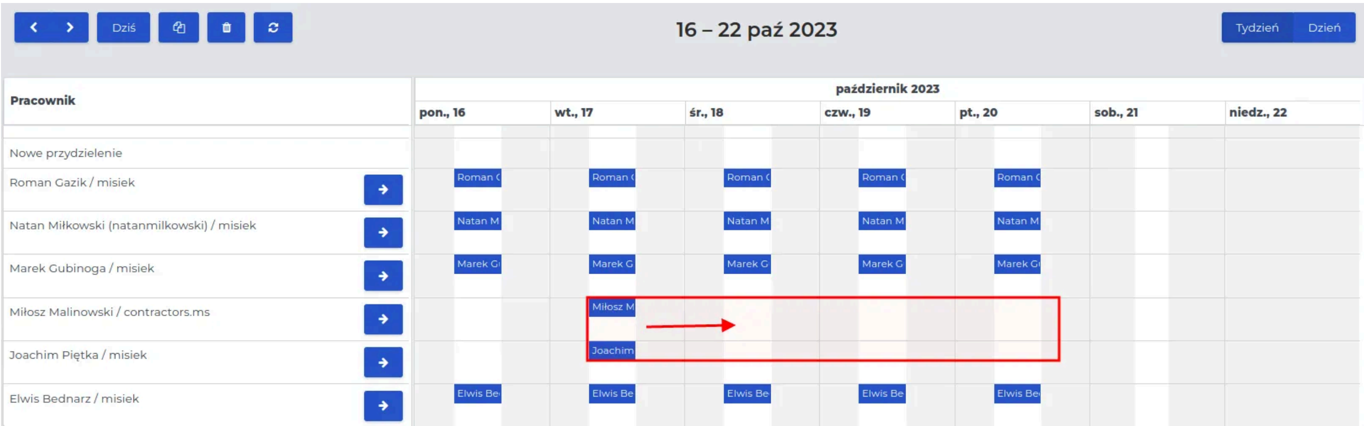
9. The created graphical table of the employees’ calendar for the first “Work Range” will look as follows:

10. Using the “Drag events” function on the calendar, set the end date to **October 20, 2023**.

11. The calendar will display the current assignments for “Facade” work. Click on the date **October 17, 2023**, starting the next “Work Range” and fill out the form according to the description in **point 7**.



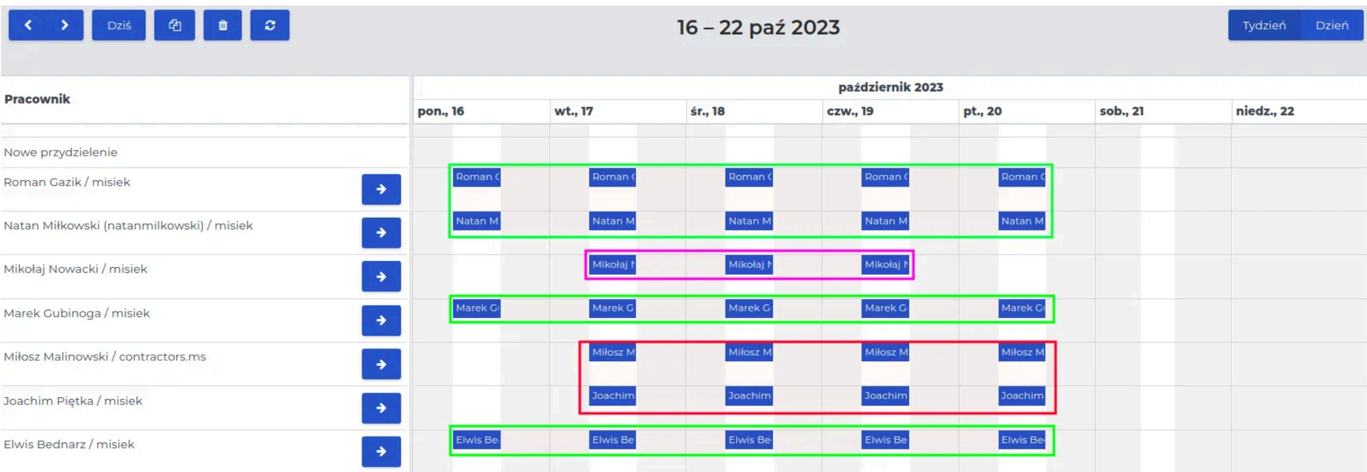
12. The entries created for the two “Work Ranges” on the calendar will look as follows:



13. Drag the entries for the marked workers on the calendar to the “End of work range” date. For “Roof” it will be **October 20, 2023**.

14. Proceed similarly for the last “Work Range - Chimneys”, marking one worker on the calendar on **October 17, 2023**. After saving, drag his assignment to the end date **October 19, 2023**.

15. The workers saved on the “Work Schedule” are arranged in alphabetical order. After the number of days with assignments, we see to which “Work Range” they belong.



Activity Log

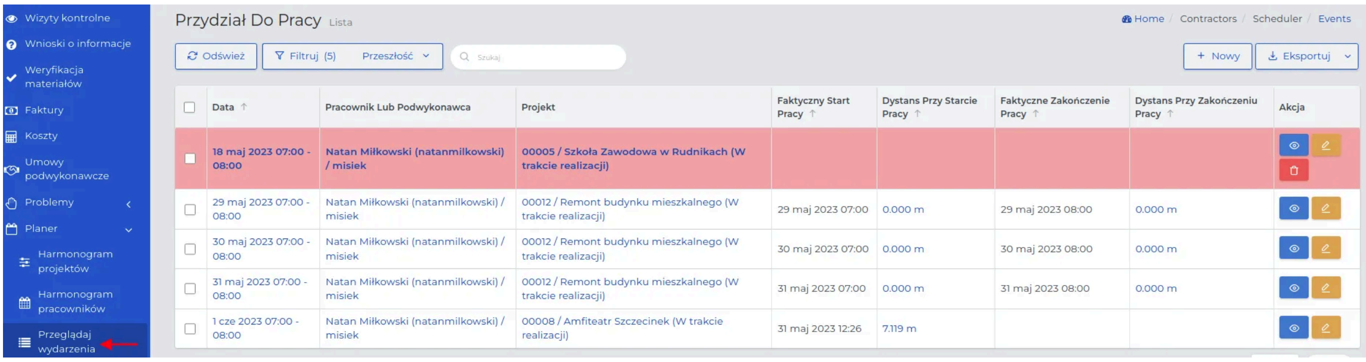
The issues described in this section relate to the control and evaluation of employee efficiency. The system records all events related to the activity of field workers or foremen based on their logging into the mobile application.

Job allocation

In addition to the employee schedule in the form of a calendar, there is a table with job assignments: “Contracts → Planner → Browse events”.

The data in the table includes:

- the date and range of hours during which the employee should be present on the project,
- the name of the employee or subcontractor,
- the name of the project on which the event was recorded,
- the actual start and end time of work,
- the location of logging in at the beginning and end of work, defined as the “distance” from the correct project location - clicking opens a map with the position from which the employee logged into the mobile application.



The information in the “Distance at the start and end of work” column informs superiors about the correctness of the employee’s arrival at the workplace and his departure.

The employee’s phone GPS system automatically locates his current position and sends information to Contractors.es. This verifies the correctness of the employee’s login and logout location from the mobile application.

> **NOTE:** If the employee has forbidden the Contractors.es mobile application access to the phone location retrieval service, an incorrect location may be recorded. Each time it will be the same location and usually it is the Atlantic Ocean west of central Africa (0°00’00.0”N 0°00’00.0”E).

Depending on the **administrative settings** of the work planner, the employee may receive a notification on his phone in case:

- he leaves the workplace faster or is late for it,

- if his login location to the application will be distant from the project address.

NOTE: Records on the list marked with a red background color indicate an existing irregularity (location or work registration time) for a given entry in the system. Only a user with appropriate permissions has the ability to edit such entries.

REMEMBER: Verifying job assignments is crucial for the correct settlement of an employee’s working time. The system allows you to edit job assignments until they are marked as settled.

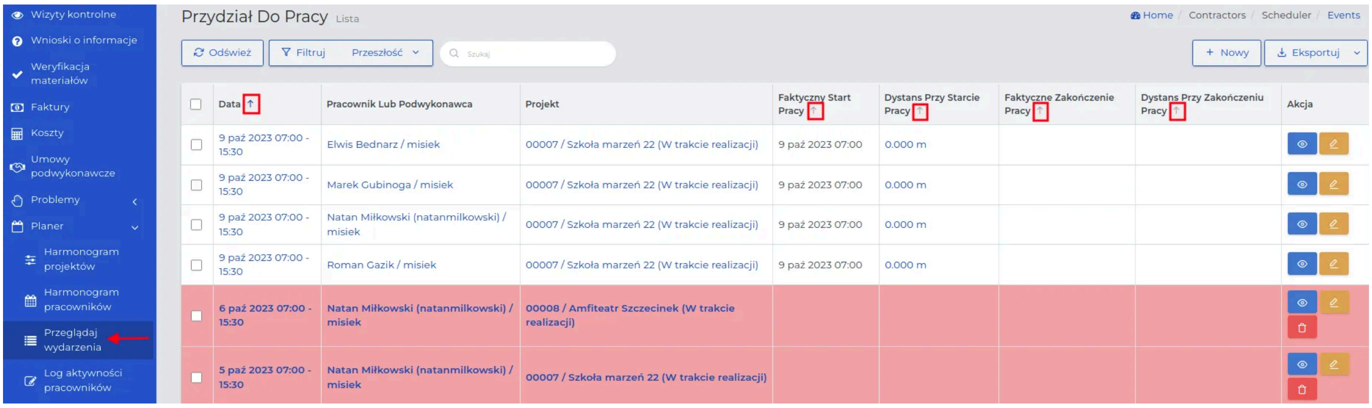
NOTE: Field workers receive notifications on mobile devices with a job assignment one day in advance, according to the time set by the **administrator**.

Filtering, sorting, adding and removing assignments

You can filter the table with assignments by employee, as well as:

- Sort by variables contained in column names.

REMEMBER: Sorting by column has been described in more detail [here](). It only applies to those entries for which the “arrow” next to their name is active.

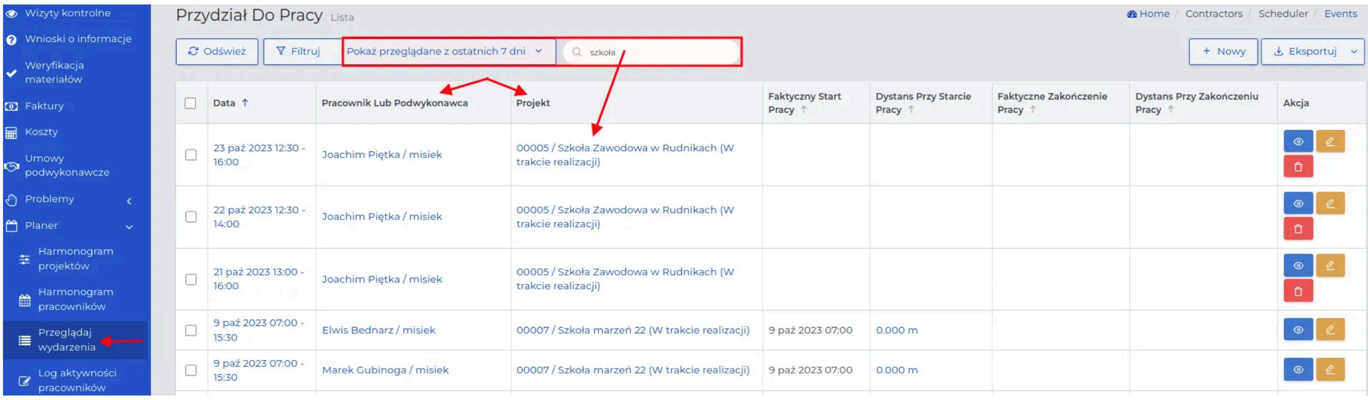


- Filter on the list by applying a time interval and possible occurring irregularities available in the basic filter or expand the range of variables using the detailed filter.

NOTE: The system automatically generates today’s assignments on the list.

REMEMBER: Detailed filtering allows you to apply multiple variables at once. Thanks to this, the list with the register of job assignments will reject irrelevant records, leaving only those that correspond to a specific search.

- Search for records in columns by their name.



NOTE: Using all search and filtering options at the same time will display the most limited list of records.

REMEMBER: Before each subsequent search, check the currently set filters and make changes in them if necessary.

- Add a new job assignment.

NOTE: You can create new assignments without having to go into the employee schedule calendar.

- Delete unnecessary entries.

NOTE: This should only be done for future entries or those in which the employee has not recorded his presence. The system administrator can recover an entry from the trash.

REMEMBER: You will not delete entries with a retroactive date that have a registered presence at work. To delete such an entry, edit the record and remove the presence, and only then can you delete the record itself.

You can remove job assignments in three ways:

Method I: From the employee's work schedule.

After finding the unnecessary assignment, click on the blue "Trash" icon and select the date and place to be removed from the list.

NOTE: Each entry must be marked separately for deletion.

Method II: Using the "Trash" action button visible next to the record in the list.

Method III: Using the "batch" method. The description of this method can be found here.

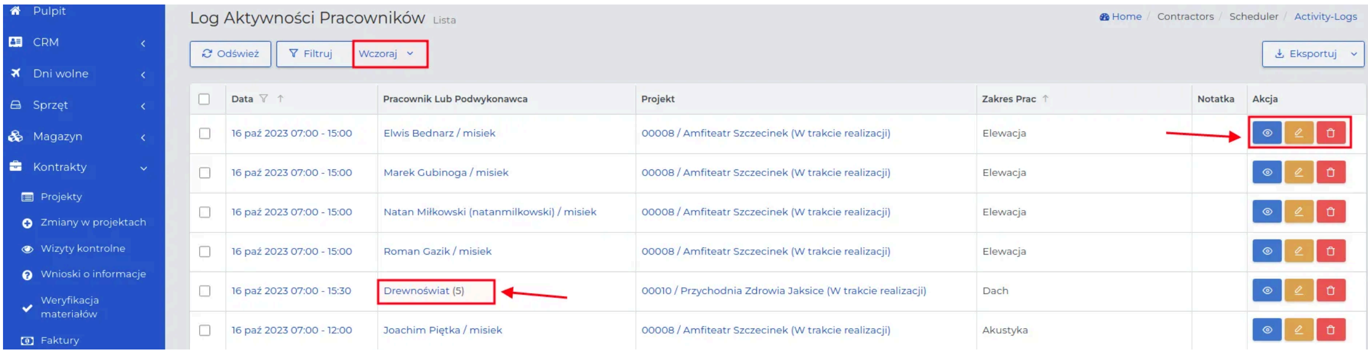
REMEMBER: Use the sorting or filtering function to limit the number of records to be deleted.

Employee Activity Log

The register created in the list in the “Contracts → Planner → Activity Log” menu is updated in real time based on data provided by field workers through the mobile application. In this way, it is possible to continuously account for working time for each record entered in the system.

NOTE: If a field worker or subcontractor does not log into the mobile application with a job assignment, the record will not be filled with data.

REMEMBER: If a subcontractor is added to a specific scope of work, you will find information about the number of his workers who should appear on the project on a given date in parentheses next to his name.



In the preview of the selected record, you will find information about employment conditions such as the minimum scope of work, the established hourly rate, and the value of remuneration calculated based on the registered working time. Additionally, you will see the time range in which the employee was active on the project, recorded by the mobile application.

NOTE: Only authorized system users can make changes to the working hours ranges, which are necessary to settle the employee’s remuneration.

REMEMBER: Changes in remuneration conditions can only be made until the employee’s schedule has been settled and forwarded to accounting.

REMEMBER: By applying a detailed filter, you can search for a specific employee on the list to view their activity.

Reports on work progress

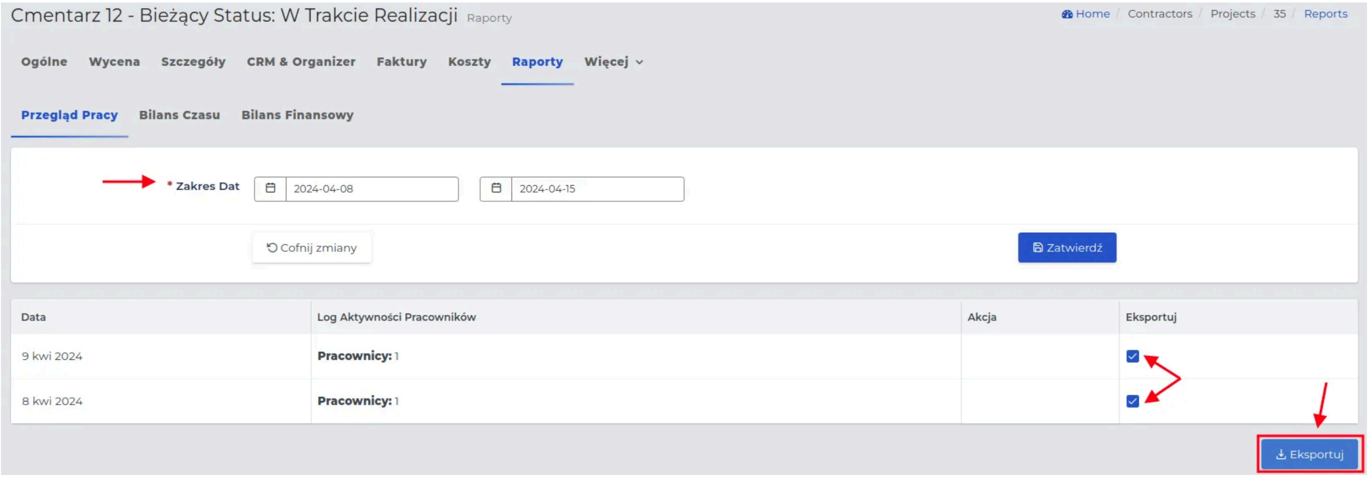
To prepare a report on work progress, generated based on users logging into the mobile application, proceed in the following order:

1. Go to the project view, then click on the “Reports → Work Overview” tab.

2. In the “Date Range” field, set the time range.

> **NOTE:** The time range can be set to a maximum of 31 days.

3. Mark in the “Export” column those dates from the specified time range that the generated report should cover.



> **REMEMBER:** The data downloaded by the system relates to all entries made by the foreman when creating daily reports.

4. Click on “Export” and save the file in PDF format, then send it by email or hand it over to the client in printed form.

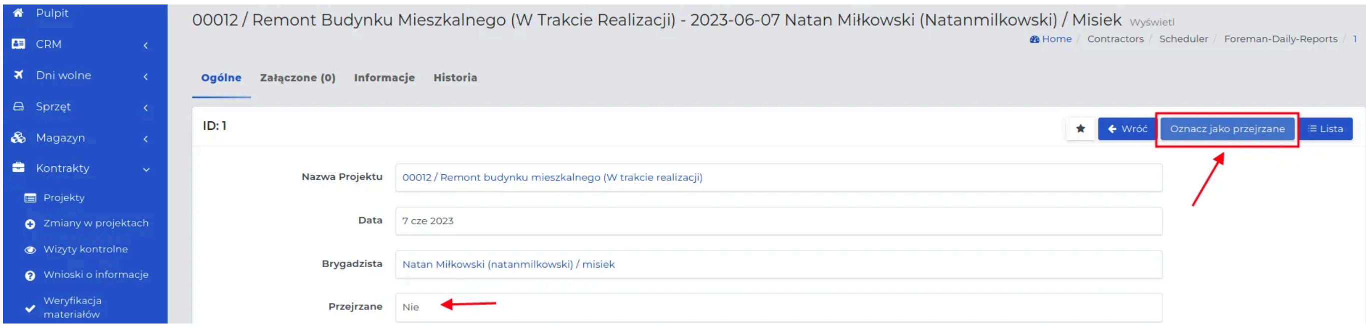
Daily reports

The register created on the list in the “Contracts → Planner → Daily reports” menu contains all the progress on the project noted by the foreman.

Daily work progress reports contain important information that allows for the assessment of project progress. The visible data in each project record allows for the assessment of work progress.

In the record preview, you can read the employee’s report filled out and saved in the mobile application. The system will register, in the “Reviewed” column, which system user reviewed the given entry with the report.

NOTE: Daily reports should be reviewed and marked as “reviewed” by the project manager or project manager’s assistant.



REMEMBER: Reopening the same report will not result in it being marked as read by another user. For the system, the first record of reviewing the entry counts. Only the display by another user will be recorded in the history.

Reports

The purpose of measuring the effectiveness of actions based on reports available in the system is to introduce beneficial improvements during the implementation of tasks and projects.

Reports in Contractors.es are available in the “Contracts → Planner → Reports” section and include:

1. **Project time balance** - total time spent by employees working on a selected project.
2. **Financial balance of projects** - the difference between the contract amount and all costs incurred in connection with the implementation of the project.
3. **Project invoicing balance** - financial settlements with the client, including stage invoices for completed contract stages of work.
4. **Changes in projects** - a financial summary of changes in projects that have been accepted and sent.
5. **Employee salaries** - salary settlements for employees calculated by the system based on their working time.
6. **Subcontractor remuneration for time work** - settlements with subcontractors for their services.
7. **Sales by sales representatives** - a report on which sales representatives are more effective - based on the projects won.
8. **Sales by cost estimators** - a report on which cost estimators are more effective - based on the projects won.
9. **Presence of field workers** - statements illustrating the conscientiousness and obligation of your field workers (delays, presence, whether they registered at the project address).

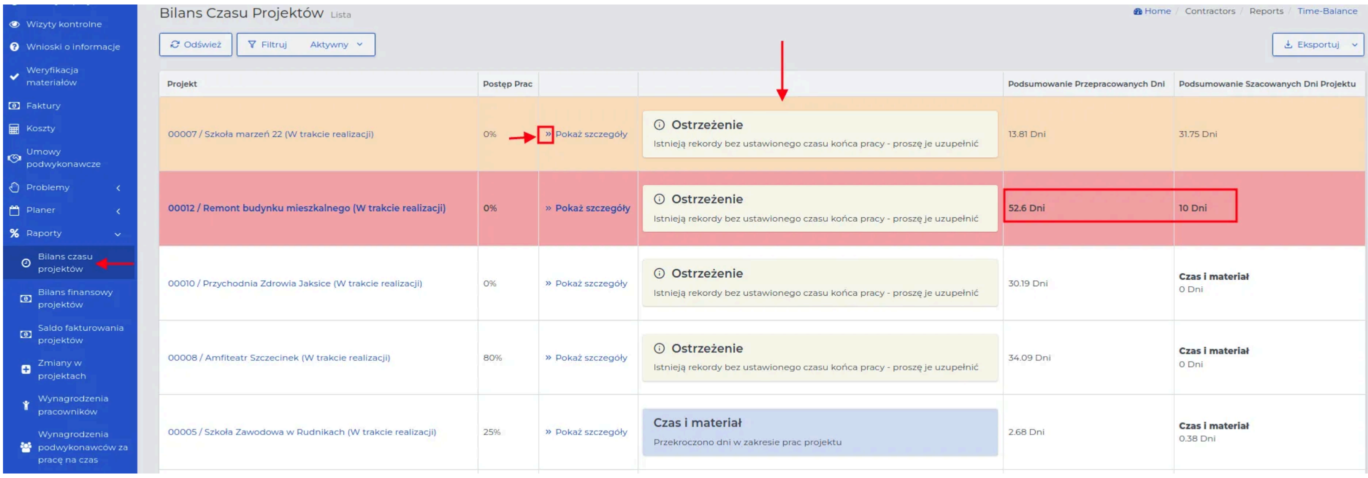
Time Balance

Based on the daily reports sent by foremen on the progress of work on a selected project, reports filled out by those visiting the project, and the planned work schedule, the system calculates whether the project is already delayed and there may be losses due to this, or it is according to plan - the report presents whether the estimated number of working days planned for a selected range of work is sufficient or not.

> **REMEMBER:** The quality and speed of task execution are influenced not only by the employees selected from the list, but also by the smoothness in the supply of materials and equipment, without which work on the construction site cannot take place.

Projects marked on the list with background colors indicate that there are delays related to the working time of the employees.

- **Red color** - indicates exceeding the set working time limit.
- **Orange color** - the range of counted working time is close to the planned one.



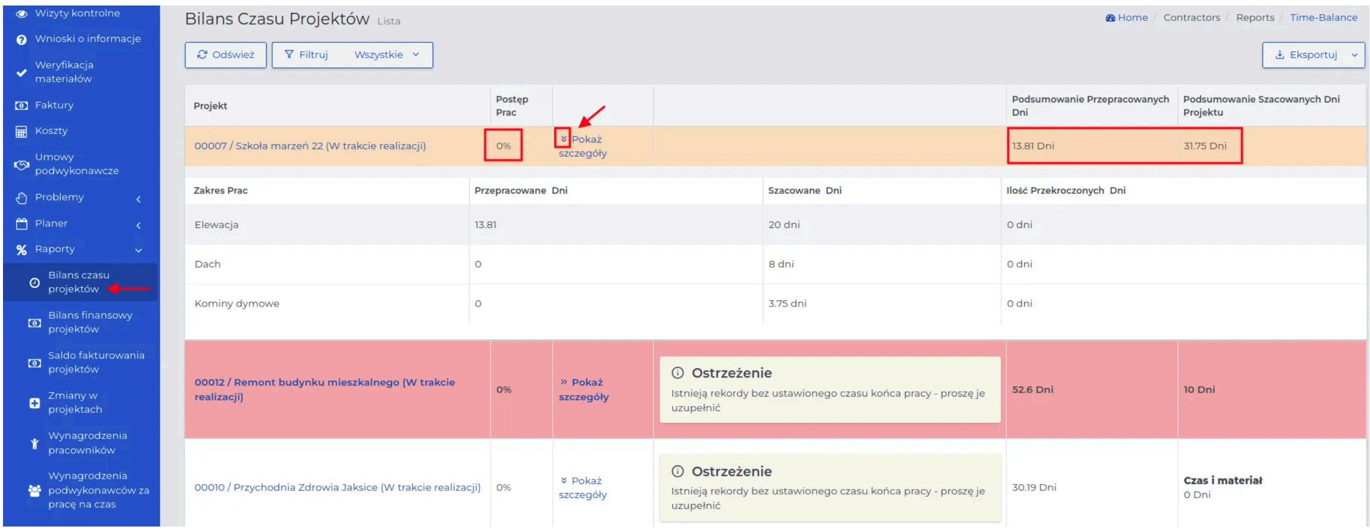
In the project records, for which discrepancies have been noted, the following messages may appear:

- **There are records without a set end of work time** - this means that there are records on the work schedule list for the selected project with an incomplete end of work time.
- **Exceeding days in the project work range** - for selected projects, the number of days given in the estimate has been exceeded in real time for a given range of work.

> **REMEMBER:** You can recognize a project with a "Time and Material" estimate by the blue background color of the message visible on the list of records.

> **REMEMBER:** Completing records, for which "Warnings" remain visible on the list, will affect the final result in other types of balances available in the system.

Using the "Show details" arrows next to each record with a work time balance, you can view a detailed work time settlement for this project.



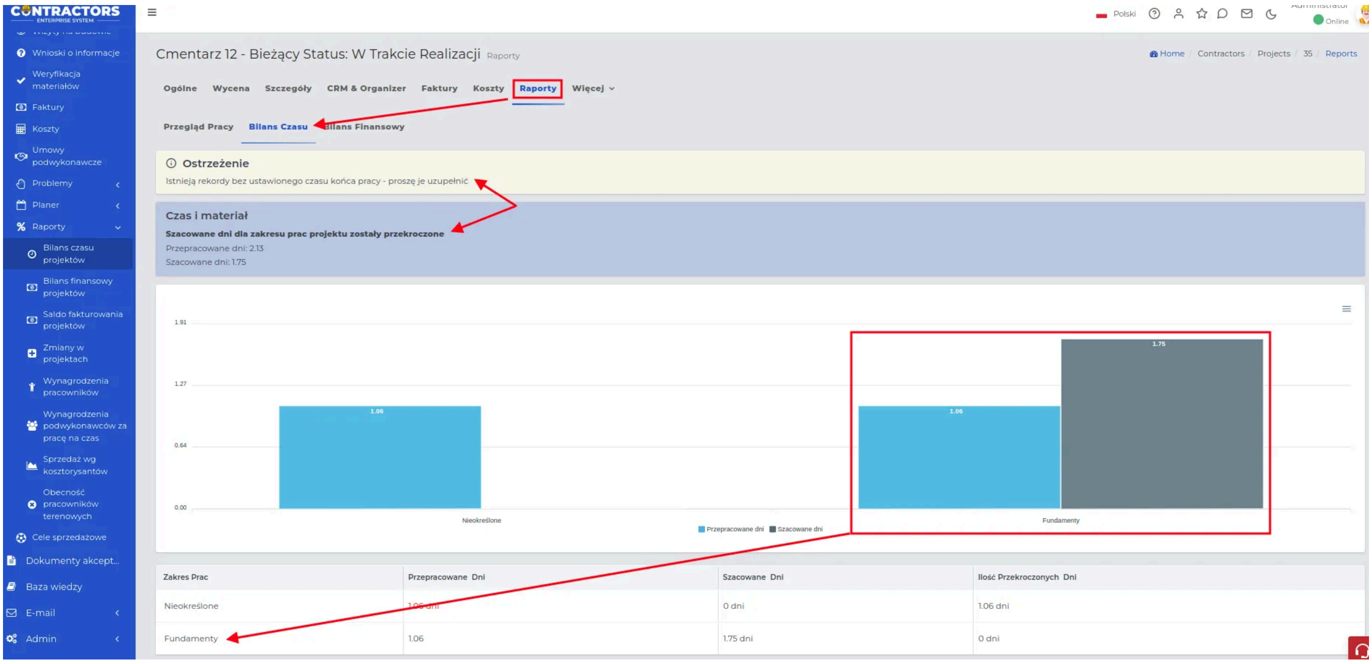
NOTE: The name "Undefined" on the list with the work range means work in which the activity has not been defined, e.g. when manually filling in attendance by an office worker.

Projekt	Postęp Prac			Podsumowanie Przepracowanych Dni	Podsumowanie Szacowanych Dni Projektu
00007 / Szkoła marzeń 22 (W trakcie realizacji)	0%	Pokaż szczegóły	Ostrzeżenie Istnieją rekordy bez ustawionego czasu końca pracy - proszę je uzupełnić	13.81 Dni	31.75 Dni

Zakres Prac	Przepracowane Dni	Szacowane Dni	Ilość Przekroczonych Dni
Elewacja	9.56	20 dni	0 dni
Nieokreślone	4.25 dni	0 dni	4.25 dni
Dach	0	8 dni	0 dni
Kominy dymowe	0	3.75 dni	0 dni

REMEMBER: Regular reporting of work progress by the appropriate employees is key to analyzing the profitability of the project.

It should be mentioned that Contractors.es generates clear bar charts with a summary of the time spent on the implementation of individual work scopes. They are available in the "Reports" tab in the preview of the selected project on the contracts list.

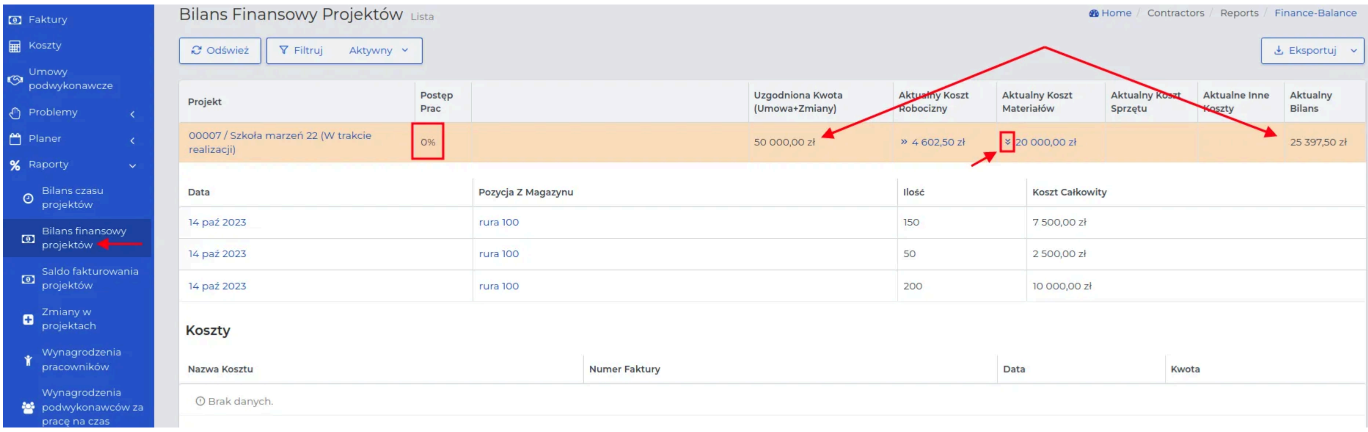


When you hover over a selected bar, the number of estimated or worked days will be displayed. Visible messages with "Warnings" inform about irregularities that should be paid attention to or supplemented if possible.

Financial Balance

The financial balance of projects shows the amount of profit or loss achieved by subtracting the "Contract Amount" from all costs incurred during the execution of works. The system automatically fills in the values in the financial balance table based on:

- the working time of field workers (column “Actual labor cost”),
- used construction materials from our warehouse or purchased and entered directly into the project warehouse,
- the value of rental or depreciation of necessary construction equipment (column “Actual equipment cost”),
- other incurred costs, not qualifying for the above groups (column “Actual other costs”).



For a selected record with a project, it can be stated that:

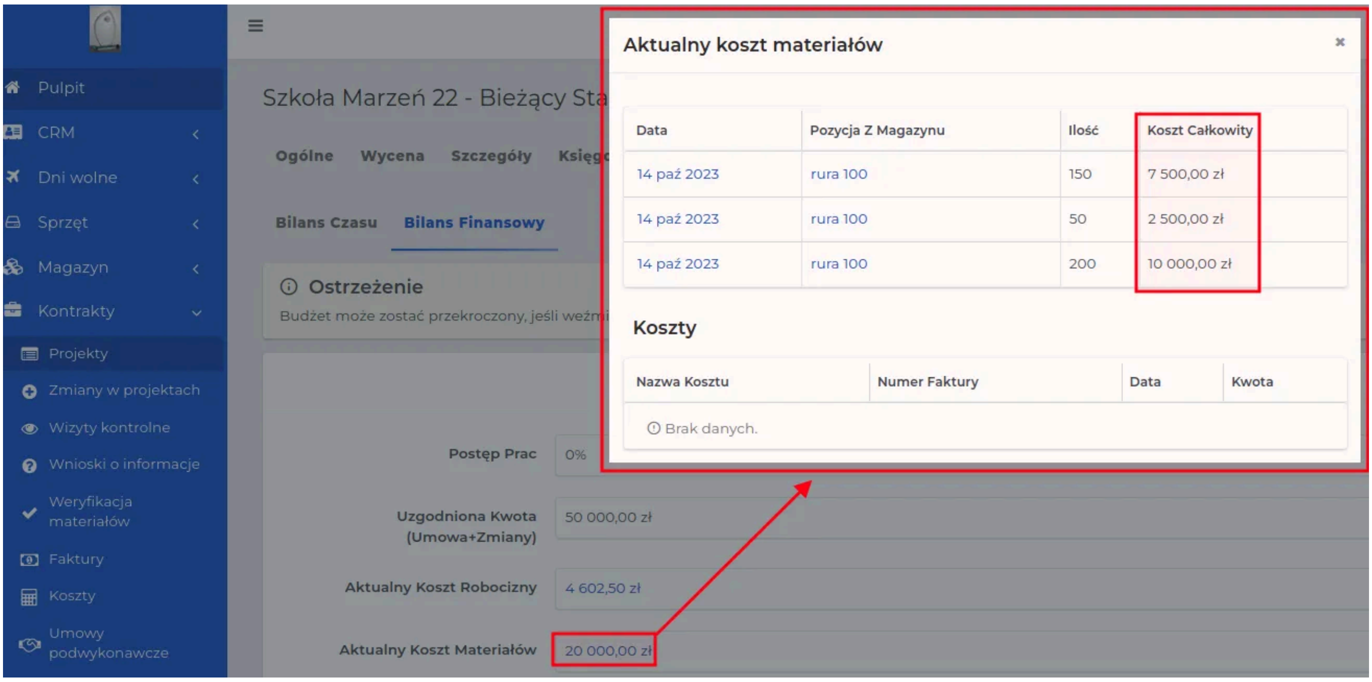
- The “Actual balance” value is positive, which means that the “Agreed contract amount” is not lower than the total costs incurred so far. The “Actual balance” is the amount of optional earnings.

- The orange color indicates that the work progress value of 0% may affect the final financial balance of the project - the color depends on the proportionality of work progress and the value of costs incurred.

- Fields in the table not filled in so far, such as “Actual equipment cost” and “Actual other costs”, will be generated by the system if a cost type belonging to one of the given categories arises.

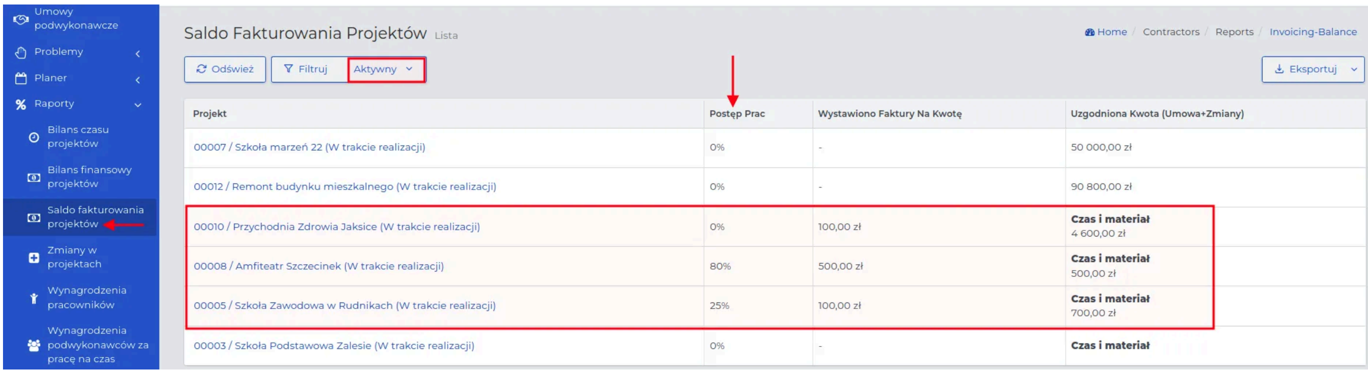
Using the “Show details” arrows available in the columns specifying the current types of costs, you will go to their detailed preview.

In the preview of the selected project on the list in the “Contracts → Projects” menu, you can also view the “Financial Balance” generated by the system. All you have to do is go to the “Reports → Financial Balance” tab for the selected project. Rows containing costs are marked with blue font color. Clicking on the name of these rows will display a detailed description for a given cost group.



NOTE: The near end of the project implementation statistically means that the value in the "Current financial balance" column may be close to the final value determining the financial profit.

Billing Balance



REMEMBER: A fully settled project will be removed from the "Project Billing Balances" list.

NOTE: The amounts listed are net amounts and do not include VAT.

REMEMBER: Each subsequent invoice entered for the selected project will sum up the amount given in the "Invoiced for the amount" column.

NOTE: Work progress indicates the percentage of the task completed.

Changes in projects

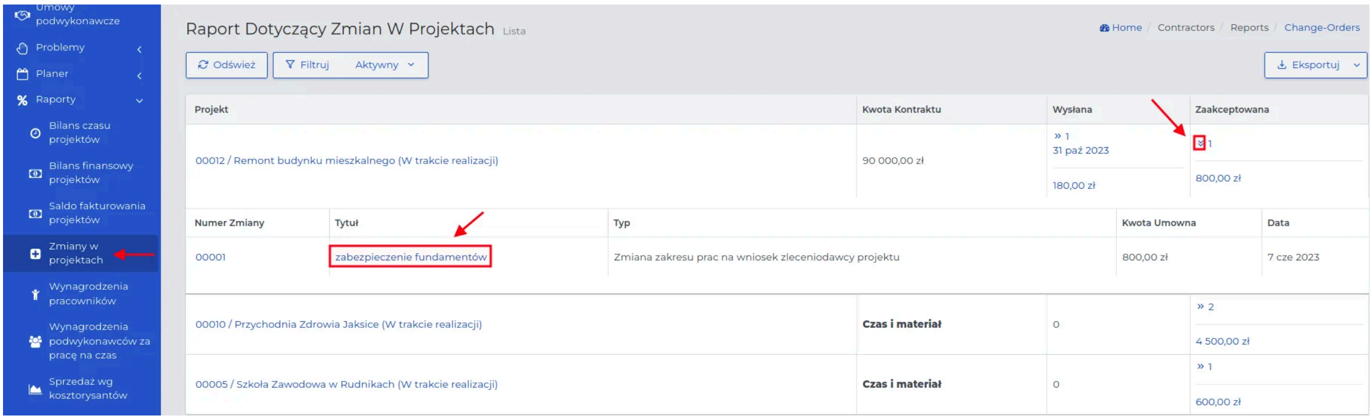
Changes in projects often generate additional costs that were not included in the original estimate. Each reported change should be accepted before work begins.

On the list in the "Contracts → Reports → Changes in projects" section, the names of projects for which at least one accepted change has been reported in the system are visible.

NOTE: The exception is projects settled on a "Time and Material" basis. For this type of projects, changes cannot be introduced. A new estimate should be created and a settlement value for it should be determined, or changes should be settled according to the time and material principle.

REMEMBER: The value given in the "Contract Amount" column is the contractual amount agreed upon during the project estimation. The amount given in the "Accepted" column (regardless of the number of changes introduced) will be automatically added to the "Agreed Amount (Contract + Changes)" column.

Using the "Show details" arrows, you can view what and at what contractual amount the accepted change in the project relates to.

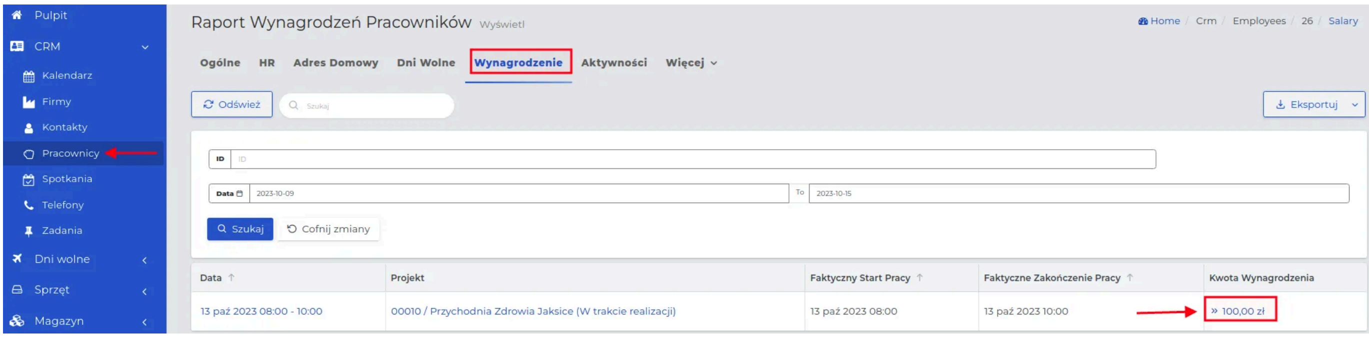


REMEMBER: Removing accepted change requests will change the value expressed in the "Agreed Amount" column available in the "Contracts → Reports → Project Billing Balances" section.

Employee Remuneration

Field employee salary reports are calculated based on their logging into work in the mobile application. This is a list of costs associated with employing and settling employees for their work, which should be exported and passed on to the accounting department.

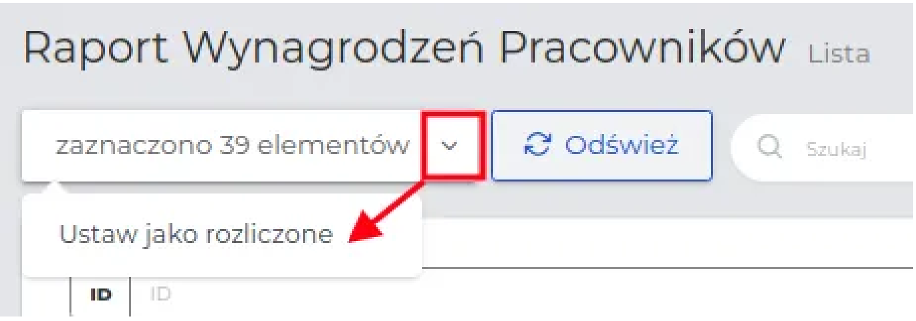
In the preview of the selected employee on the list, you will see on which days and where he was assigned to work and the value of the remuneration calculated based on his settings in the HR tab of his contact.



You can limit the range of displayed records to a time range or group to which the search should apply.

> **NOTE:** You cannot edit entries on the employee payroll list.

You can settle entries individually or in bulk using the "batch method" shown in the screenshot below.



> **REMEMBER:** Settled entries related to employee salaries will not be available in the "Salaries" tab in their record preview. Only unsettled amounts are located there.

Subcontractor Salaries

Subcontractor labor salary reports under the "Time and Material" contract are generated based on the subcontractor foreman's logins to the mobile application (he should have an account set up in our system). The settlement of the subcontractor's employees' working time depends on their number and hours worked (product of hours and number of employees).

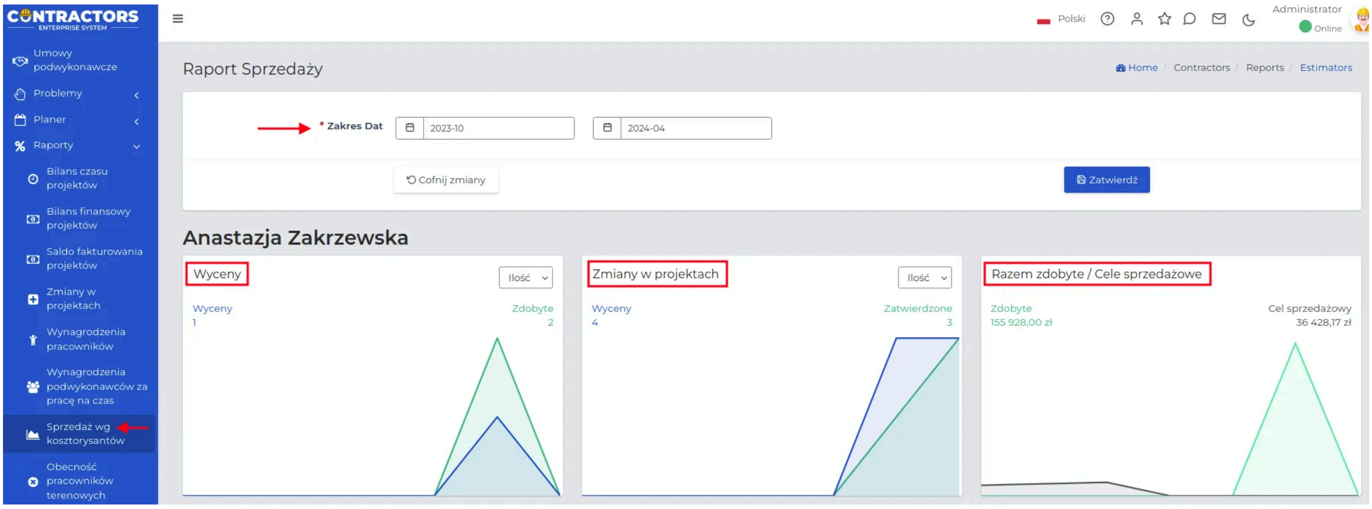
In the "Salary amount" field, the total value calculated based on the settings entered during the creation of the subcontracting agreement will be summed up.

The functionality of this system section is similar to the described "Employee Salaries".

Sales by estimators/sales representatives

Based on variables related to the work of estimators, the system allows generating reports that directly concern:

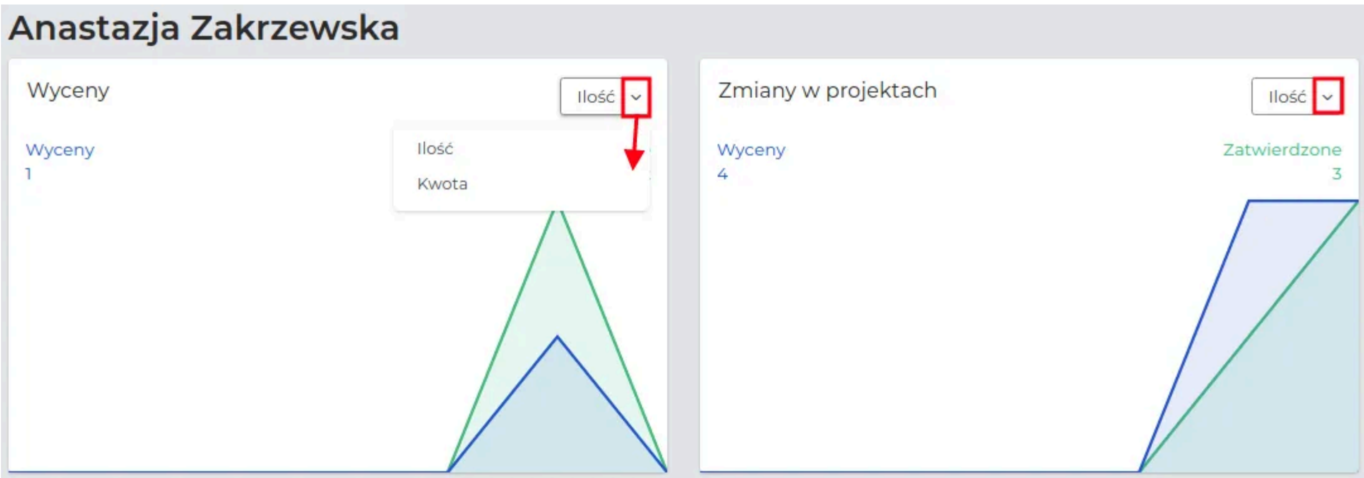
- **Estimates:** Number of projects for which the estimator made estimates.
- **Changes in projects:** Number of corrections in his projects (only for the estimator's report).
- **Contract amounts:** Profitability of acquired projects in relation to the established "Sales Target".

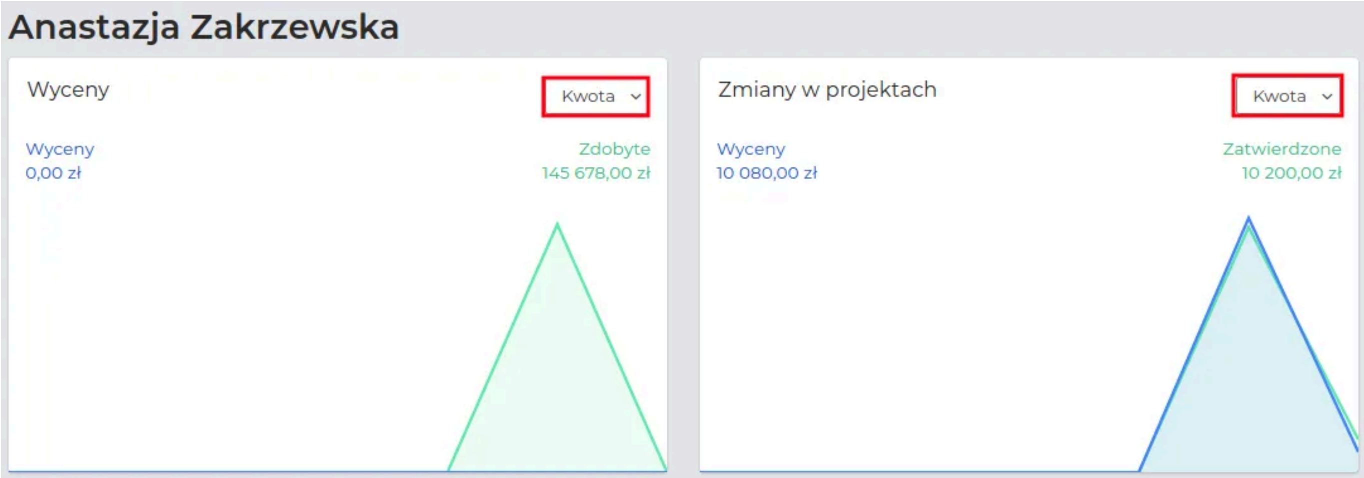


> **REMEMBER:** Choose the date range for the sales report to be able to assess the effectiveness of employed workers in a specific time frame.

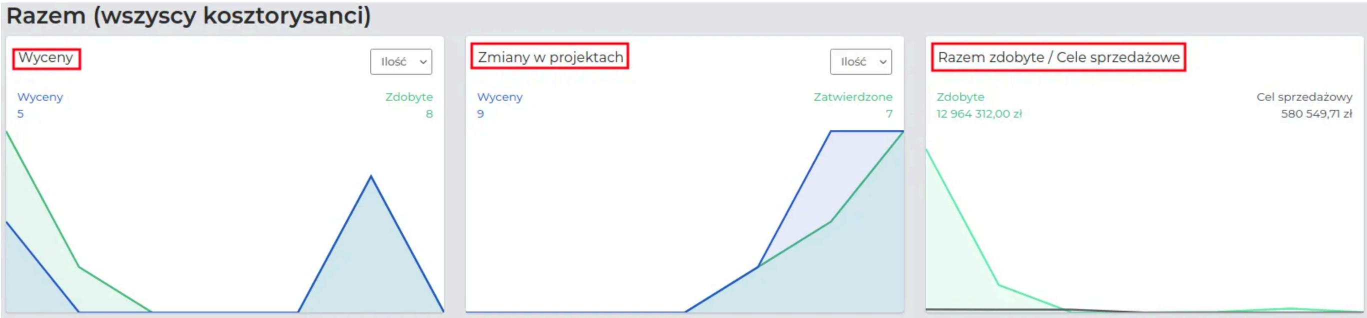
Thanks to graphic charts, you will be able to easily assess the work of the selected Estimator, which will allow you to quickly identify his strengths and weaknesses.

> **REMEMBER:** For "Estimates" and "Changes in projects" you can interchangeably apply "Quantity" and "Amount".





Estimators on the settings list are arranged in alphabetical order. At the very end of the list, there are common variable charts available, generated for all Estimators together.

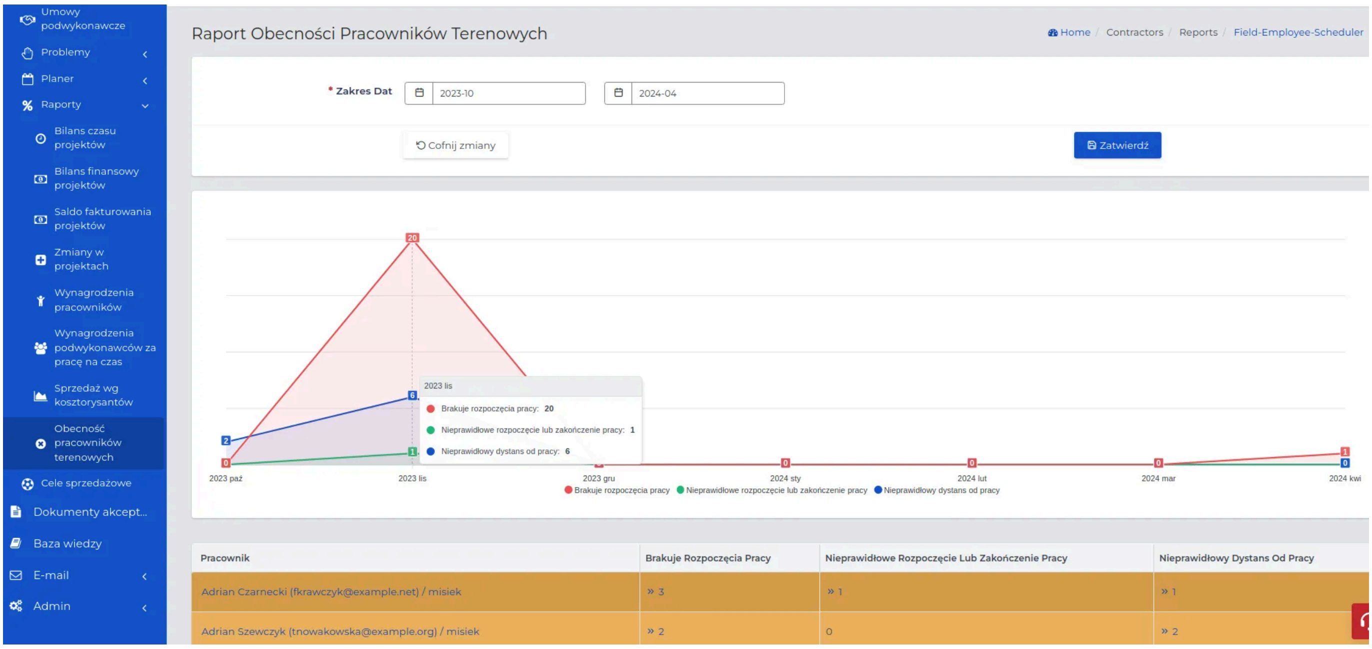


Field workers presence

The field workers presence report is linked to the “Contracts → Planner → Browse events” section, which graphically shows:

- Lack of work start (red line),
- Incorrect start or end of work (green line),
- Incorrect distance to work (blue line).

> **NOTE:** The boundary values for variables, i.e. what delay we accept or how far you can register from a given project address, are set by the **administrator** of the system.



REMEMBER: Set the "Date Range" to which the report should apply, so that the number of charts and information on the screen is readable.

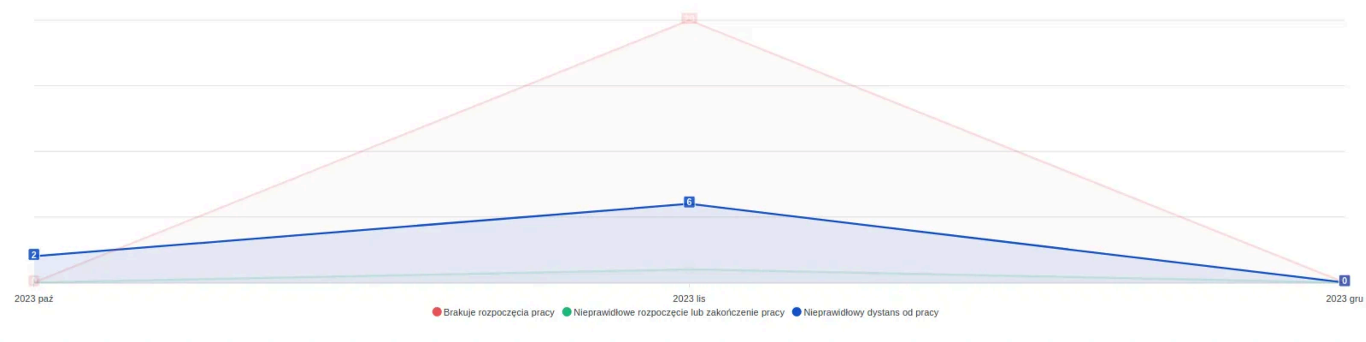
NOTE: The values on the chart for one variable are the sum of all irregularities in a specified date range. If one worker was supposed to be on 2 projects in one day and was late in both cases, each of these events counts as a separate entry.

Pracownik	Brakuje Rozpoczęcia Pracy	Nieprawidłowe Rozpoczęcie Lub Zakończenie Pracy	Nieprawidłowy Dystans Od Pracy
Adrian Czarnecki (fkrawczyk@example.net) / misiek	» 3	» 1	» 1
Adrian Szewczyk (tnowakowska@example.org) / misiek	» 2	0	» 2

Projekt	Data	Dystans Przy Starcie Pracy	Dystans Przy Zakończeniu Pracy
*** rekord usunięty ***	2 lis 2023 07:00 - 14:00	451.457 m	588.625 m
411 793 / Prace remontowe 167 (Wybrano nas do realizacji)	7 lis 2023 06:00 - 15:00	503.036 m	76.868 m

Depending on your needs, you can adjust the appearance of the charts by choosing one of the options below:

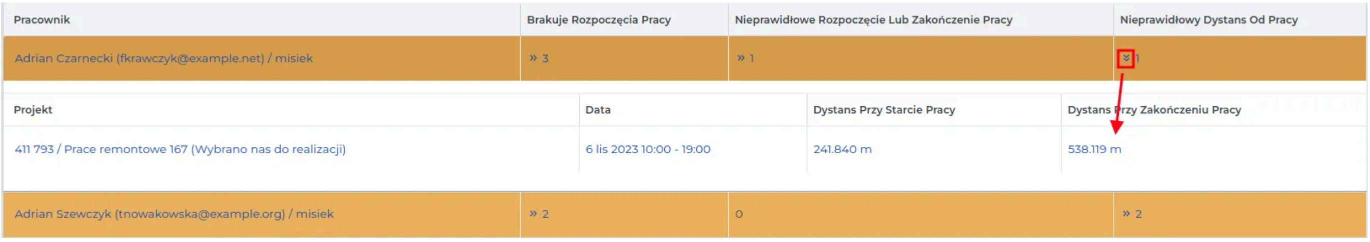
- When you hover over a selected variable, only that chart will be highlighted.



- When you click on the names of two variables, only one chart will be visible.

On the list below the charts, all field workers using the mobile application are visible. They are arranged in alphabetical order.

For each of them, three variables are recorded according to which charts are generated. By clicking on the “arrow” icon, you will go to the preview of the assigned irregularity. You can expand the lists of all variables and collapse them by clicking on the “arrow” turned in the opposite direction.



Pracownik	Brakuje Rozpoczęcia Pracy	Nieprawidłowe Rozpoczęcie Lub Zakończenie Pracy	Nieprawidłowy Dystans Od Pracy
Adrian Czarnecki (fkrawczyk@example.net) / misiek	» 3	» 1	1
Adrian Szewczyk (tnowakowska@example.org) / misiek	» 2	0	» 2

Projekt	Data	Dystans Przy Starcie Pracy	Dystans Przy Zakończeniu Pracy
411 793 / Prace remontowe 167 (Wybrano nas do realizacji)	6 lis 2023 10:00 - 19:00	241.840 m	538.119 m

> **NOTE:** The intensity of the row colors indicates the number of irregularities registered by the system. Workers without reservations are marked in white.

Sales Goals

For each sales representative, you can set monthly “Sales Goals” that will allow you to track expected results in the sales field.

> **NOTE:** By default, only administrators and managers can add and edit entries in this section.

Creating Sales Goals

To add a “Sales Goal,” follow these steps:

1. Go to the “Contracts → Sales Goals” menu and select the “New” button.
2. Fill out the form, where the meaning of the fields is as follows:

- **Sales Representative:** Select from the list the employee for whom you want to set a “Sales Goal.”
- **Month:** Specify the period for this settlement.
- **Project Type:** Set the type of project the summary should concern.
- **Sales Goal:** Enter the amount for which the “monthly goal” will be achieved.

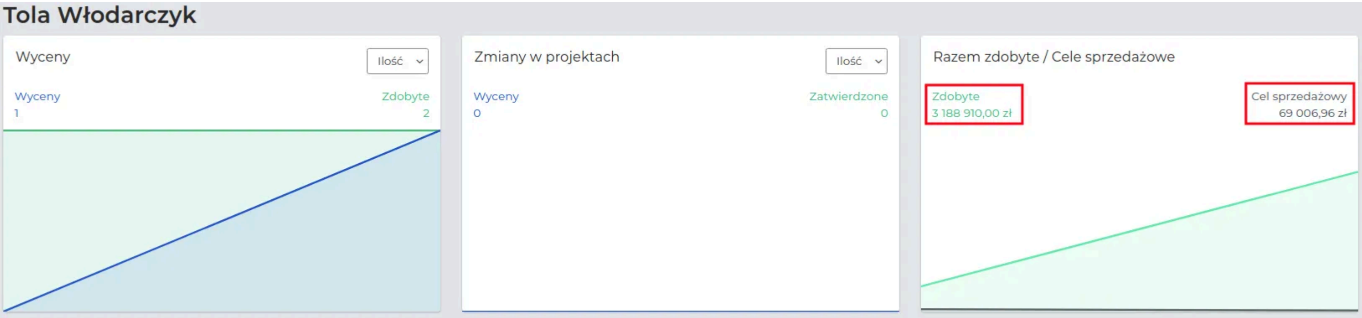
> **REMEMBER:** You can add several “Sales Goals” for one representative at the same time by clicking the “New” button and filling in the appropriate fields in the forms.

3. Save the entered data using the “Confirm” button.

> **NOTE:** The colors of the record highlights indicate the degree of their achievement: red means the goal was not achieved, green means the goal was achieved, and white means the goal is in progress, and the deadline has not yet passed.

The “Total amount of acquired contracts” for the selected representative from the list will also be visible on the chart in the “Sales by Sales Representatives” section.


Cele Sprzedażowe Lista
Home / Contractors / Sales-Goals
Odśwież
Filtruj
+ Nowy
Eksportuj
Kosztorysant
Miesiąc
Łączny Cel Sprzedażowy
Łączna Kwota Zdobytych Kontraktów
Zaksięgowana Osiągnięta Sprzedaż
Załączone
Akcja
Tola Włodarczyk (estimator) / misiek
2023-05
34 941,25 zł
0,00 zł
0
Tola Włodarczyk (estimator) / misiek
2023-12
45 341,94 zł
0,00 zł
0
Tola Włodarczyk (estimator) / misiek
2023-11
22 691,45 zł
0,00 zł
0
Tola Włodarczyk (estimator) / misiek
2023-10
21 913,58 zł
2 701 241,00 zł
2 701 241,00 zł
0
Tola Włodarczyk (estimator) / misiek
2023-09
47 093,38 zł
487 669,00 zł
1 118 100,00 zł
0
Tola Włodarczyk (estimator) / misiek
2023-08
28 342,74 zł
0,00 zł
0


Tola Włodarczyk
Wyceny
Ilość
Wyceny
1
Zdobyte
2
Zmiany w projektach
Ilość
Wyceny
0
Zatwierdzone
0
Razem zdobyte / Cele sprzedażowe
Zdobyte
3 188 910,00 zł
Cel sprzedażowy
69 006,96 zł

Issues

Reporting issues related to project execution significantly impacts the completion timeline. Recording these issues is crucial for documenting any disputes with the client.

> **NOTE:** Only an **administrator** can set issue categories.

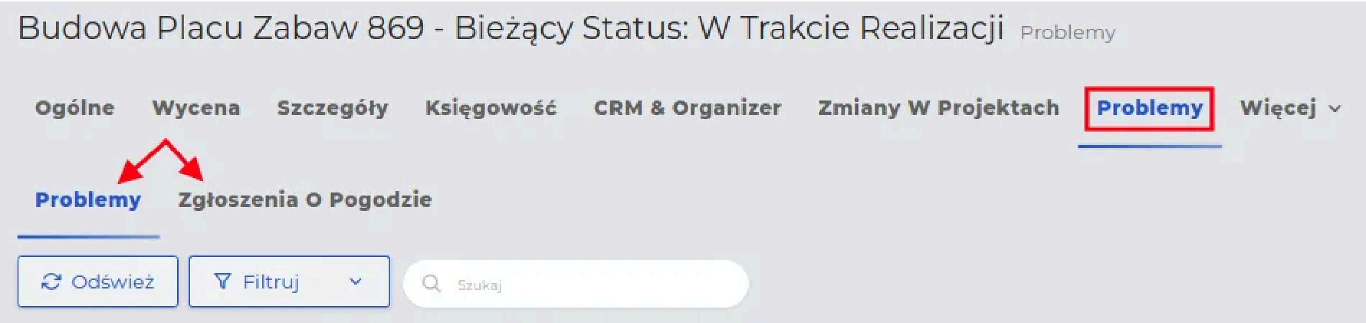
Contractors.es allows reporting issues through both the web and mobile applications. Reports are divided into two categories:

- Weather-related reports,
- Non-weather-related issue reports.

This section will describe how to create reports using the web application. For field workers and foremen using the mobile app, this topic will be covered in the mobile app description.

The “Attached” column indicates the number of notes, files, and emails attached to the report. A foreman can add attachments to active issues via the mobile app - this way, a conversation documenting the issue resolution can be conducted.

> **REMEMBER:** In the project overview, under the “Issues” tab, there is a list of issues related to the specific project.



Weather Reports

To create a weather-related issue report, follow these steps:

1. Go to the menu “Contracts → Issues → Weather Reports” and click the “New” button.
2. Fill out the form, where the meaning of the fields is as follows:

- **Project**: Select from the list the project to which the report pertains.

> **NOTE:** Based on the address of the selected project, the fields related to the weather description will be automatically filled in based on the current conditions at that location.

- **Date:** The field is filled with today's date.

> **REMEMBER:** You can create reports with a past date, but you must modify the weather conditions that prevailed at that time.

- **Assigned Employees:** Select the individuals associated with the report who will be notified of the issue. On the right side of the table, the employees involved in the project will appear by default.

> **REMEMBER:** You can add any employees from the list for whom you want to create an association by selecting them from the left side of the list.

- **Note:** Enter the types of work that cannot be performed due to weather conditions.

3. Verify the values for the weather description fields and save the data using the "Confirm" button.

Other Issues

Unlike weather reports, other construction site issue reports require explanations from the employees marked in the form.

To register another issue in the system, follow the scheme:

1. Go to the menu "Contracts → Issues → Other Issues" and click the "New" button.

2. Fill out the form, where the meaning of the fields is as follows:

- **Project:** Select the project related to the report from the list.
- **Title:** State the issue.
- **Date:** The field is filled with today's date.
- **Resolve issue by date:** Specify the deadline for resolving the issue.

> **REMEMBER:** If you do not set a date in the "Resolve issue by date" field, the record on the list will not be color-coded, even if the resolution deadline has passed.

- **Reported by:** The entity registering the issue. The field is filled with the data of the logged-in person. You can select another person belonging to the group of employees.

- **Assigned employees:** Select the people associated with the report who will be responsible for resolving the issue. On the right side of the table, employees involved in the project will be set by default.

> **REMEMBER:** You can add any employees from the list for whom you want to create an association by selecting them from the left side of the list.

- **Type:** Specify the type of report from the available options entered by the **administrator.**
- **Scope of work:** Indicate the type of work that cannot be carried out due to the issue.

> **NOTE:** If the issue concerns multiple scopes of work, create a new report for each of them.

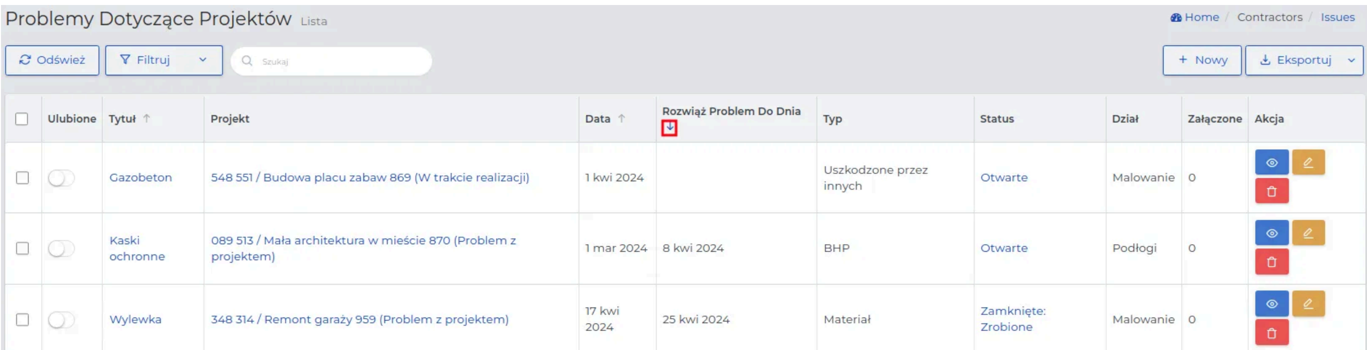
- **Priority:** Determine how important the report is by setting one of the available priorities.
- **Status:** The stage of the reported issue. Leave it as "Open" when creating.
- **Description:** Describe what causes the problem.

3. Save the data using the "Submit" button.

Changing Statuses in Problem Reports

The full list of problem reports is available in the "Contracts → Problems" section.

The list of reported problems can be sorted by resolution date, for example, starting from the closest to today.


Problemy Dotyczące Projektów Lista
Home / Contractors / Issues
Odśwież | Filtruj | Szukaj | + Nowy | Eksportuj

	Ulubione	Tytuł	Projekt	Data	Rozwiąż Problem Do Dnia	Typ	Status	Dział	Załączone	Akcja
		Gazobeton	548 551 / Budowa placu zabaw 869 (W trakcie realizacji)	1 kwi 2024		Uszkodzone przez innych	Otwarte	Malowanie	0	
		Kaski ochronne	089 513 / Mała architektura w mieście 870 (Problem z projektem)	1 mar 2024	8 kwi 2024	BHP	Otwarte	Podłogi	0	
		Wylewka	348 314 / Remont garaży 959 (Problem z projektem)	17 kwi 2024	25 kwi 2024	Materiał	Zamknięte: Zrobione	Malowanie	0	

> **NOTE:** Reports without a specified problem resolution date will appear on the list in the order of their creation dates.

> **NOTE:** Only employees specified in the "Assigned Employees" field during problem reporting can make changes to this record.

REMEMBER: Problem reports whose resolution deadline has already passed or those that received a very high or high priority during creation are marked in red on the list.

Changing the status for a problem report is done in the following order:

1. On the list of reported problems, find the record for which you want to change the status.

2. Click on the name of its current status.

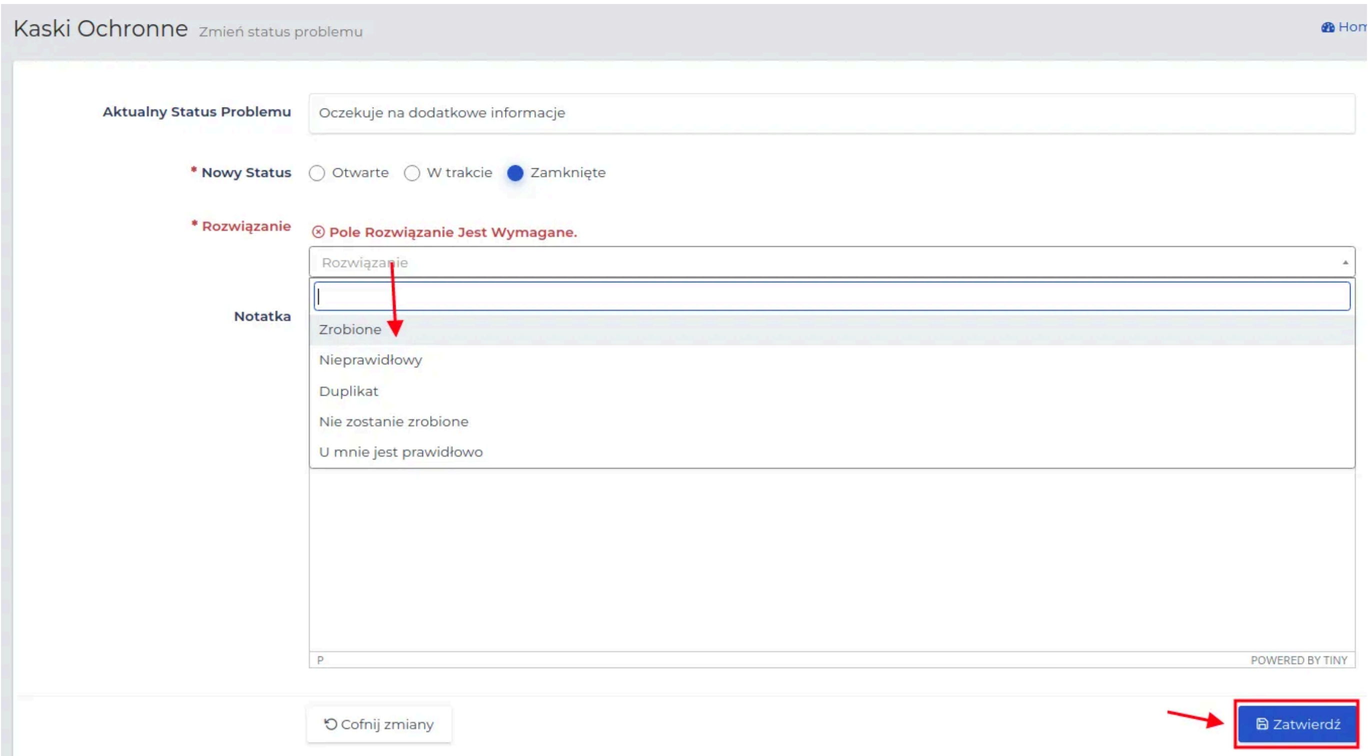
REMEMBER: For newly created reports, this will always be the "Open" status.

3. Select the new status in the form and enter an explanatory note in the "Note" field.

4. Save the data using the "Submit" button.

NOTE: Changing statuses works on the principle of "step back and step forward."

REMEMBER: For the "Closed" status, choose "Resolution" and justify your choice.



Frequently Asked Questions

1. **What are the available project statuses and how do they help in managing projects?**

   Project statuses are the stages a project goes through from its initiation to completion. They facilitate tracking progress, planning subsequent actions, and better team management. Every newly created project automatically receives the status "Selected for project execution." You can then manually update its status by selecting the next stages.

2. **How does the project bidding stage differ from the project itself?**

   The project bidding stage involves preparing an offer and contacting the client before signing a contract. A project is an assignment that has been accepted and is being executed in the system.

3. **Where can I create a project estimate?**

   A project estimate can be created in two ways:

   - during the project bidding (menu: Contracts → Project Bidding),
   - directly from the project list (menu: *Contracts* → *Projects*), if the project already has the status "Selected for execution."

4. **Why can't I create an estimate in a given project?**

   Detailed estimates can only be created in projects with the status "Selected for project execution." Ensure the project has this status, then choose the estimation method (time and material: yes/no).

5. **What is the difference between the "Time and Material" option set to "Yes" and "No"?**

   - **"No"** – the estimate is based on the calculation of work scopes, considering individual rates, units (e.g., m^2, hours), material quantities, and additional costs.
   - **"Yes"** – billing is based on actual working time (hourly rate), materials are provided by the investor or billed according to actual usage.

6. **What is the "project problem" status in a project?**

   The "project problem" status indicates a stage where problems or special situations have temporarily prevented the continuation of work on the project.

7. **Do I need to close the form while creating a project to enter a new contact into the system?**

   You do not need to close the form you are currently filling out. Using the "Quickly add contact" button, you can enter a new contact into the system.

8. **When can I change the project status and how do I do it?**

Changing statuses in projects defines the stages of their implementation. Simply click on the name of the current status for the selected project, and in the displayed form, choose a new status name. The statuses are set in chronological order.

9. **What are the project priorities and how do they affect management?**

   Project priorities determine their importance and can be set based on various criteria, such as the deadline or significance for the company. They affect project management by establishing the order of actions and resource allocation.

10. **What should be considered when creating a quote?**

    When quoting a project, the costs of materials, employee work time, purchase or rental of specialized equipment, and additional costs incurred during implementation are taken into account.

11. **How does the "Markup" field work?**

    Entering a percentage value in the "Markup" field increases the total cost of materials by the specified margin. This is useful in cases of uncertain purchase prices and provides a financial reserve.

12. **What information does the quote contain?**

    The quote includes the method of billing for the service, scopes of work, costs of materials and equipment, and other costs with a final summary.

13. **Why can't I delete a quote from the system?**

    Remember that a quote is a project. You cannot delete such projects for which the minimum status "We were chosen for implementation" has been set. Such a project can be canceled. Unsuccessful projects provide additional information indicating whether it is worth making further quotes for a potential client.

14. **Can I edit a quote after the project has started?**

    No. After changing the project status to "In progress," editing the existing quote is blocked. You can only add a new quote or change the project.

15. **Where does the system get material prices from?**

The system automatically fills in material prices based on the last purchase. There is an option to manually edit the price for each material.

16. **How to generate a quote in PDF format?**

    You can generate a quote in PDF format using the "Download PDF" function button visible in the project preview with the status of a completed quote. The system allows you to select the content visible on the downloaded document (e.g., whether to include prices for individual stages).

17. **Why can't I generate a PDF file with the quote?**

    You can create a quote in PDF format only for a project that has at least one "Scope of work" and a specified final "Offer amount." Additionally, if the "Offer amount" exceeds the summary amount for the work stages, generating a PDF with such a quote will be limited to a file with only the final price and a list of works (without the possibility of sharing costs of individual works).

18. **What is the import of a quote from a Norma PRO file and how to conduct it?**

    Importing a quote from a Norma PRO file allows for the automatic filling of quote fields in the system based on data from a cost estimate prepared in the Norma PRO program.

19. **Why does the system reject the uploaded Norma PRO quote file?**

    You can upload a Norma PRO quote file only to projects with the status “In the process of quoting” or “Preliminary quote sent.” Change the status if the project does not have one of the given statuses.

20. **When do I need to provide the “Contract amount”?**

    For quotes with the status “We have been selected for implementation,” it is necessary to provide the “Contract amount” before starting work.

21. **For which projects can I submit change requests?**

    You can submit changes for “active” projects and for those where the quote is not based on the “Time and material” principle.

22. **Where will the value for the change in the project be added?**

    Costs related to changes in the project will be included in the project’s financial reports and the billing balance. A separate invoice should be recorded for changes in projects.

23. **How to create a change request in a project for a “Time and Material” estimate?**

    If the project is billed on a “time and material” basis, the change should also be implemented according to this scheme.

    If a change request needs to be submitted, a new project should be created, taking into account the proposed change. Once such an estimate is accepted, it will be executed as a separate order.

24. **I see a change request in the project in the system, but I can’t change its status, why?**

    Only users with the appropriate permissions can change the statuses for submitted change requests in projects.

25. **How to account for the cost of additional workdays?**

    Use the “Estimated additional man-days” field to indicate the extra time needed to complete the project. This value does not affect the cost estimate but informs the client about a possible extension of the deadline.

26. **Does a change in service rates affect existing estimates?**

    No. The rates entered into the estimate are recorded at the time of its creation. Changing the rates in the price list does not affect already saved estimates.

27. **What can control visits pertain to and for which projects are they intended?**

    Control visits can pertain to projects with various statuses. Before the project begins, the inspector can determine, for example, the condition of the building, conduct employee inspections during the work, and assess the quality of the work after completion.

28. **Who are the “Assigned employees” visible in the information request?**

    These are the individuals who, after receiving feedback from the supplier or contractor to whom they sent the inquiry, will be able to change the status in the request.

29. **What types of billing invoices can I use in the system?**

    Depending on the progress of the work and agreements with the Client, the system allows for the registration of settlements in two variants: partial and full invoices, or advance and final invoices.

30. **What is the purpose of the “Invoices” section?**

    In the “Invoices” section, you can issue invoices as current settlements with the client or synchronize settlements with another accounting program by entering analogous records to already issued invoices.

31. **Can I change the billing method after issuing the first billing invoice?**

    No, if the first invoice issued for a given project has a specified billing method, subsequent invoices for that project must be billed in the same way.

32. **Can I include unbilled employee work time on the next issued invoice?**

    Yes, unbilled employee work time will remain on the list and will be included in subsequent settlements. On the next invoice, the billing dates for these employees’ work time will refer to the retrospective period in the detailed preview.

33. **I want to add several subcontractor agreements for one Subcontractor. Can I save them in one form?**

    No, the scope of each agreement should be specified in a separate form. For agreements billed on a “Time and Material” basis, it will be important to create a “Work Schedule History” to monitor work progress and the number of hours worked, according to which the service will be billed.

34. **What is multi-stage billing with a Subcontractor?**

    Multi-stage billing with a subcontractor allows for managing payments according to work progress and ensures control over the quality and timeliness of tasks performed. Additionally, this billing method helps avoid large upfront payments, which in turn can increase control over the project budget and subcontractor timeliness.

35. **How to bill the work time of field employees?**

    Based on the “Employee Work Schedule” and recorded events in the “Planner -> Browse Events” section, you will be able to verify entries recorded on the “Employee Payroll” list. The system marks with a red background those entries where there were irregularities related to the time or place of the employee logging into work in the mobile application.

36. **How to use the record copying function in the calendar?**

    You need to select the “Copy” function button and click on the place in the table you want to copy. After selecting the destination for the copied value, click the mouse cursor again. You can paste the allocation multiple times this way.

37. **Why can’t I change the current scope of work in an ongoing project?**

For ongoing projects, you cannot change the scope of work for which an estimate has been made. In such a situation, you need to submit a "Project Changes" request. Once it is approved, the new scope of work will appear on the project list.

38. **How do I move an entry on the work planner?**

Simply hover the cursor over the entry, and when the "pointing finger" icon appears, grab the cell with the entry and drag it to the target location.

39. **For what time range is it possible to move entries on the planner?**

Entries related to work assignments can be moved in the graphical calendar table both forward and backward (left-right).

40. **When resuming work on a suspended project, will the number of days worked disappear from the planner?**

The number of days worked is remembered by the system regardless of the period of work suspension.

41. **How can I view an employee's schedule for a selected date?**

You can go to the employee work schedule view tab by employee and select a specific person there. You can also go to the schedule events list and filter by person there.

42. **Why do some employees have assignments marked in gray in the selected project's schedule?**

Assignments marked in gray indicate that employees have been previously scheduled on another project's work schedule, so they cannot be assigned to the selected project on the same day at the same time. Assignments in blue pertain to the currently viewed project.

43. **Can one employee be assigned to work on two different projects in one day?**

Yes, but only if the working hours on one project are different from the other (the time cannot overlap).

44. **What should I remember when creating a work schedule for a Contractor?**

You cannot create an assignment for a contractor without first attaching a written subcontractor agreement to the project and adding the contractor's foreman, who is responsible for reporting work progress and the presence of the contractor's employees.

45. **How does the GPS system work in the context of employee location?**

The GPS system in employees' phones automatically locates their current position and sends the information to Contractors.es when they clock in and out of work, allowing verification of the correctness of employees' login and logout locations.

46. **What do the notifications received by employees regarding their login location pertain to?**

Employees may receive notifications on their phones if they leave the workplace early or arrive late, and if their login location is distant from the project address.

47. **Within what time frame can I generate a Client report on work progress?**

You can generate the report within a time frame of up to 30 days.

48. **How can I identify a project based on "Time and Material" when reviewing the Project Time Balance section?**

A project with a “Time and Material” estimate can be identified by the blue background color of the message visible in the list of records.

49. **What do the “Warnings” appearing on the Project Time Balance list indicate?**

    Each warning specifies an irregularity related to the time allocated for project execution. These may include notifications about unaccounted employee work time or exceeding workdays.

50. **What does the term “Undefined” mean on the list of work scope in the preview of a selected work time balance?**

    The term “Undefined” means that when recording the employee’s work time, the activities they were engaged in were not specified. This happens during mass editing of field employees’ attendance by an office employee, for example, when field employees do not use the mobile app or forget to log in at work.

51. **How to assess the profitability of a project using the “Project Financial Balance”?**

    The project financial balance presents the difference between the contractual amount and all incurred costs related to the project execution, allowing the assessment of the project’s profitability.

52. **How to evaluate sales by estimators using the report?**

    The Sales by Estimators report presents information about the number of projects acquired by estimators in relation to the estimates made.

53. **What information does the Field Employees Attendance report contain?**

    The Field Employees Attendance report graphically presents information about the lack of work start, incorrect start or end of work, and incorrect distance to work for field employees.

54. **Can I add multiple Sales Goals for one salesperson in a single month?**

    You can add multiple sales goals depending on the project type simultaneously by clicking the “New” button and filling in the appropriate fields in the forms. You cannot add multiple sales goals for the same project type in a single month.

55. **Why is reporting issues important in Contractors.es?**

    Reporting issues related to project execution significantly impacts the completion timeline and is crucial for documenting any disputes with the Client.

56. **Can I create a backdated report for a weather-related issue in Contractors.es?**

    Yes, you can create backdated reports, but remember to manually fill in the weather conditions that prevailed at that time.

57. **Why can’t I report multiple non-weather-related issues at once?**

    Each issue must be registered as a separate record if the problem concerns multiple work scopes. This makes verification and problem-solving easier and clearer.

Configuration

The Contractors.es mobile application is designed to support field workers and foremen in monitoring work hours and supervising project stages. With integration into the web version, data is synchronized in real-time, enabling a smooth flow of information.

The features in the mobile application depend on the role and permissions of the users. For each group, the system provides access only to specific system modules.

Field Workers

- Requesting days off.
- Reporting project issues.
- Recording work hours (start and end of work).

Foremen

- Reporting project issues.
- Accounting for workers' work.
- Determining material usage.
- Reporting material needs.
- Reporting work progress.
- Submitting requests for days off.
- Entering data on adverse weather conditions.
- Submitting requests for project changes.
- Reporting equipment needs.

Office Workers make changes in the web system based on reports from the mobile application through:

- Creating and editing work schedules for field workers.
- Controlling material expenditures.
- Verifying "Incorrect start or end of work."
- Approving or rejecting requests for days off.
- Supervising equipment needs.
- Changing the status of requests regarding project changes and additional information.

Application Installation

The installation of the Contractors.es application on an employee's phone proceeds in the following order:

1. Search for the Contractors.es application by name in the app search engine for the mobile device you are using, e.g., Android – Google Play Store, iPhone – App Store.

2. Install it on the device and proceed to launch it.

> **NOTE:** The mobile application is only available to users who have previously created an account in the web version of the Contractors.es system.

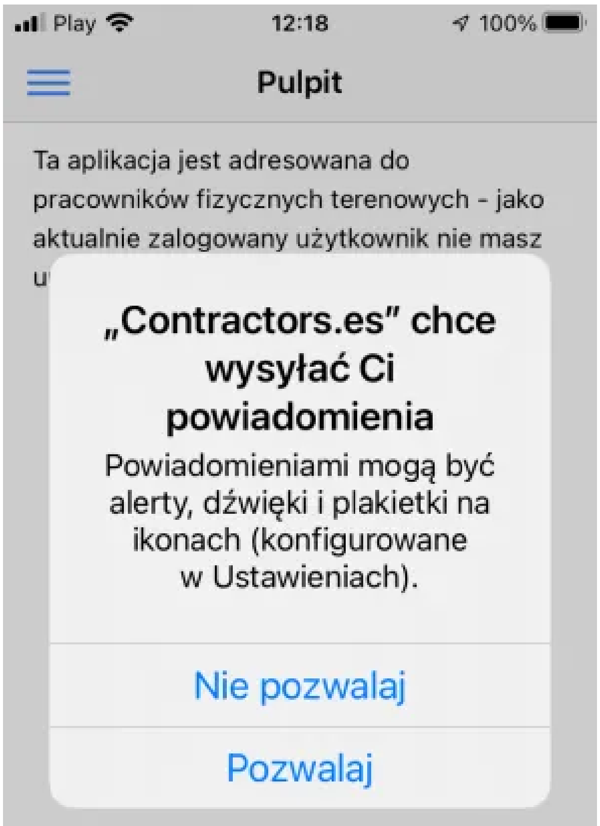
3. Fill in the login data where the meaning of the fields is as follows:

- **Contractors.es Name** – this is the "XXX" part of the company application address where you work. For example, for the address betonex.contractors.es, it will be the word "betonex".
- **Login** – the unique username assigned to the user when creating an account, e.g., natan.milkowski.
- **Password** – the same password the user uses to log into their account in the system via the web application.

4. Confirm the entered information with the "Login" button, which launches the application.

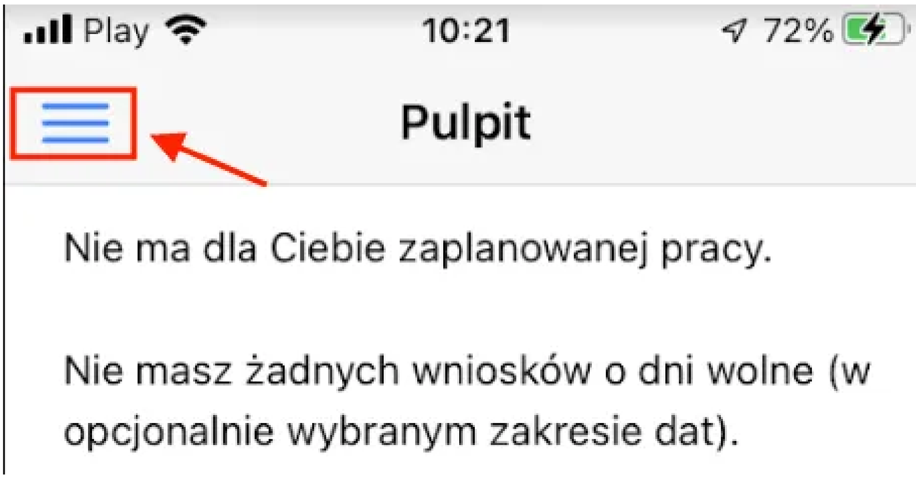
5. A notification message will appear on the desktop. Make a choice from the available options:

   - Option **"Don't Allow"** - you will not receive any notifications about assignments and changes.
   - Option **"Allow"** - you will receive notifications in the form of alerts, sounds, and badges for entries related to your account.



REMEMBER: The "Demo Version" button allows you to preview the functionality of the mobile application without the need to create an account in the system.

NOTE: If the user has not yet been assigned any work assignment in the web system, a message will appear on the screen with the content visible in the screenshot below. The area marked with a red arrow allows access to the menu.



REMEMBER: Access to specific modules in the system is restricted according to the function of the user logging into the system.

> **NOTE:** We recommend not logging out of the application after each workday to receive notifications and be able to track work assignments.

Repetitive Buttons

Repetitive buttons available in the application:

1. Access to a dropdown list from the menu.

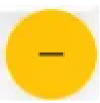
2. Filtering entries in the "Days Off" module.

3. Adding entries in the menu tabs. For an unlogged employee using the demo version, adding entries is inactive and highlighted with a gray background color.

4. Pulling out the functional list, e.g., in the "Warehouse" module.

5. Scanning delivery or purchase documents in the "Warehouse" module.

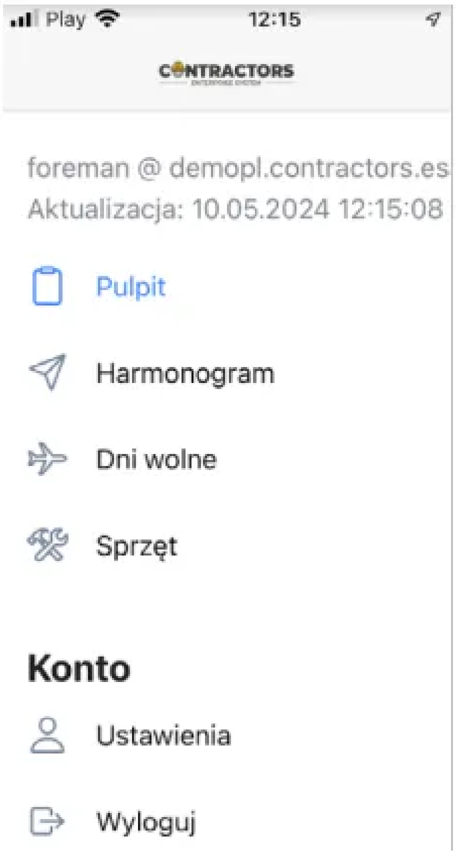
6. Registering the consumption of materials from the project's inventory list.



7. Sliding the functional list in the "Warehouse" module.

Field Worker Panel

After logging into the mobile application, you will be able to use the modules dedicated to you. Here is the list:



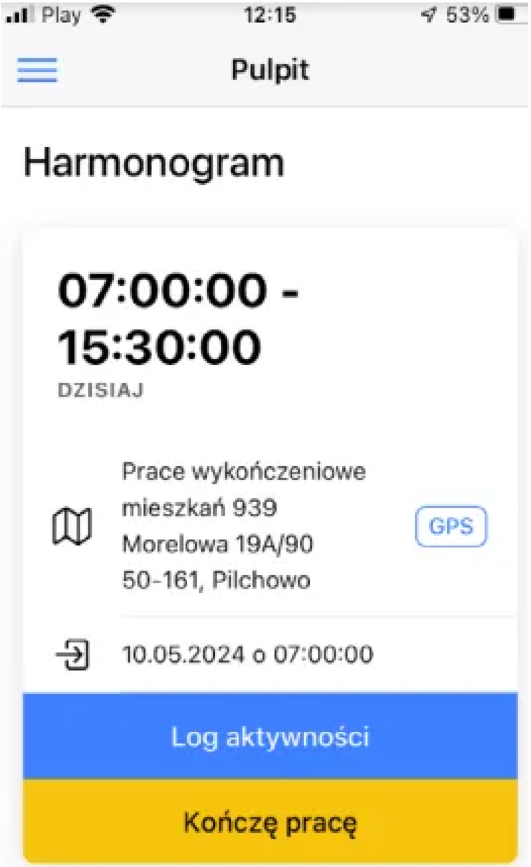
You can slide out the list using the menu in the upper left corner of the screen and slide it back by clicking on it.

> **REMEMBER:** Simply logging into the mobile application does not mean starting work for the day. To have your work time recorded and financially accounted for, you must also log into a specific project.

> **REMEMBER:** To continue recording work after logging out of the application, contact the office to reset the “Actual end of work” field.

Dashboard

In this module, only the work plan for today is visible.



The buttons below the entry serve the following functions:

- **Activity Log**: Used to record the currently performed scope of work. In the “Note” field, you can add information related to the work being done, e.g., laying 30x30 cm tiles.

> **REMEMBER:** If you perform several scopes of work with different billing rates during the day, use the “Activity Log” button. This way, the billing rate will be considered according to the actual time spent on performing the given work.

- **I finish work:** Used to report the actual end of work time for the day.

> **REMEMBER:** The application records your current location while performing work. Discrepancies will be visible in the field workers’ time report register.

Schedule

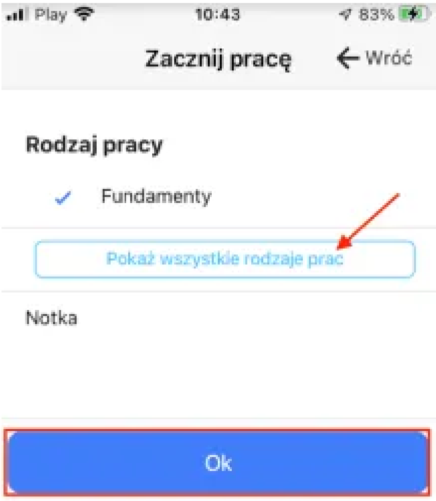
In the schedule, you will find all planned work, arranged in chronological order.

> **REMEMBER:** Use the GPS navigation available at the work assignment address to easily reach the location.

Recording work time on the project will be possible according to the scheme:

1. Start work on the project by clicking the “I start work” button.

2. Verify the planned scope of work and confirm it with the “Ok” button or make changes by selecting another option from the drop-down list “Show all types of work.”



The information visible after logging in with a work assignment includes the following data:

- Hourly range for the workday.
- Project address.
- Time of logging into the application.
- Time of work completion.
- Time range for the last entered change in the selected work scope.

> **REMEMBER:** If you performed several different work scopes during the workday, a separate entry with dedicated time will be recorded for each of them.

> **NOTE:** To change the work scope, use the “Activity Log” button.

Days Off

All leave requests, regardless of their current status, are visible on the “Days Off” list. This allows for easy tracking of used leave and remaining days off.

The buttons visible on the device screen are used for:

- filtering the list of submitted days off requests,

- creating a new day off request.

To add a day off request, follow the steps:

1. Select the blue ”+” button at the bottom.

2. Specify the time range on the pull-out calendar, i.e., the start and end date of the planned leave.

3. Choose the “Request Type” from the available options:

- **Planned Leave:** The number of days will be deducted from the employee’s available days off.

- **On-Demand Leave:** A day off requested urgently, in accordance with the Labor Code provisions.

- **Sickness:** Absence due to a medical leave.

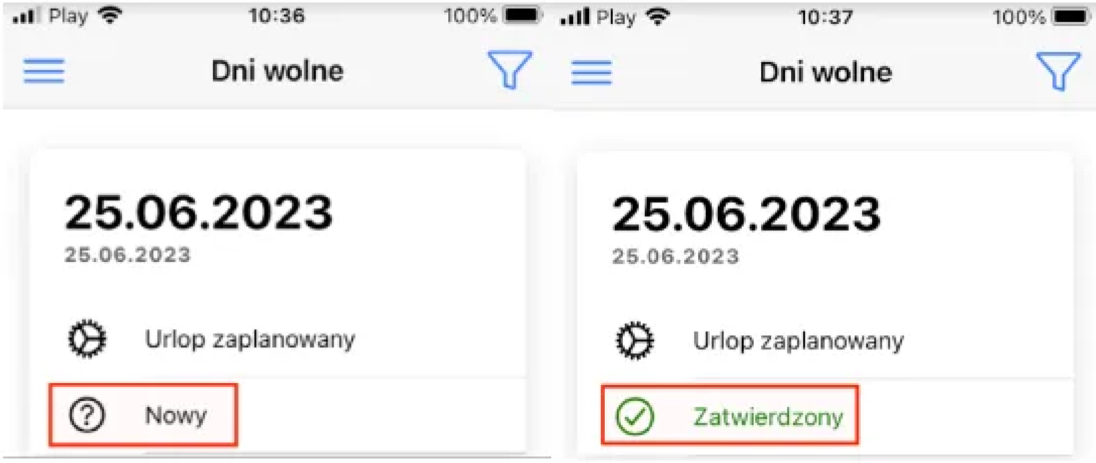
- **Unpaid Leave:** Only available to employed workers, the number of unpaid days is regulated by the Labor Code, adhering to strict regulations.

4. Save the data with the “Ok” button.

> **REMEMBER:** Leave requests must be approved in the web system by individuals with the appropriate permissions.

> **REMEMBER:** A submitted and sent leave request cannot be edited after it has been sent for approval.

The submitted request on the list will be marked as “New.” After the status changes, the update will be visible in the same place.



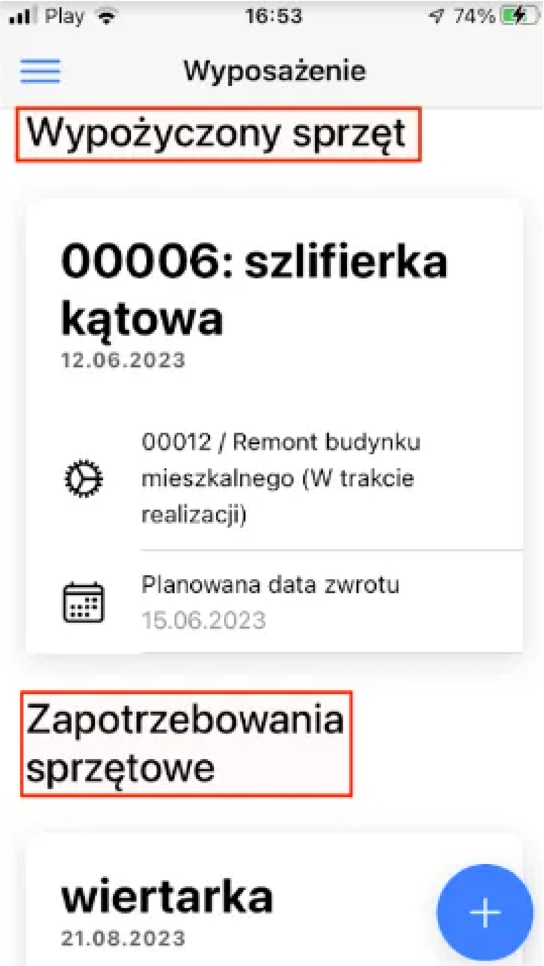
Equipment

With this module, you can request equipment, defer its return, and arrange for its pickup if the equipment's size requires it.

> **NOTE:** Requests can only be registered from the current project login location. For other projects, use the web application.

The subgroups visible in this section list pertain to:

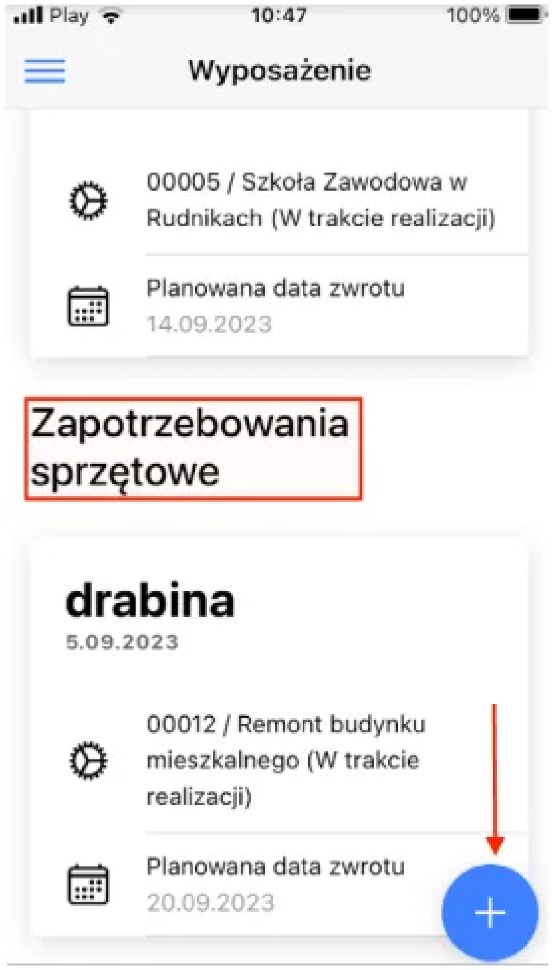
- Currently borrowed and issued equipment from the warehouse, for which you are responsible for returning to the equipment warehouse.
- Reported equipment requests awaiting fulfillment by an authorized web system user.



> **REMEMBER:** After changing the “Equipment Request” status, the equipment will automatically appear on the “Borrowed Equipment” list.

To request equipment, follow the steps:

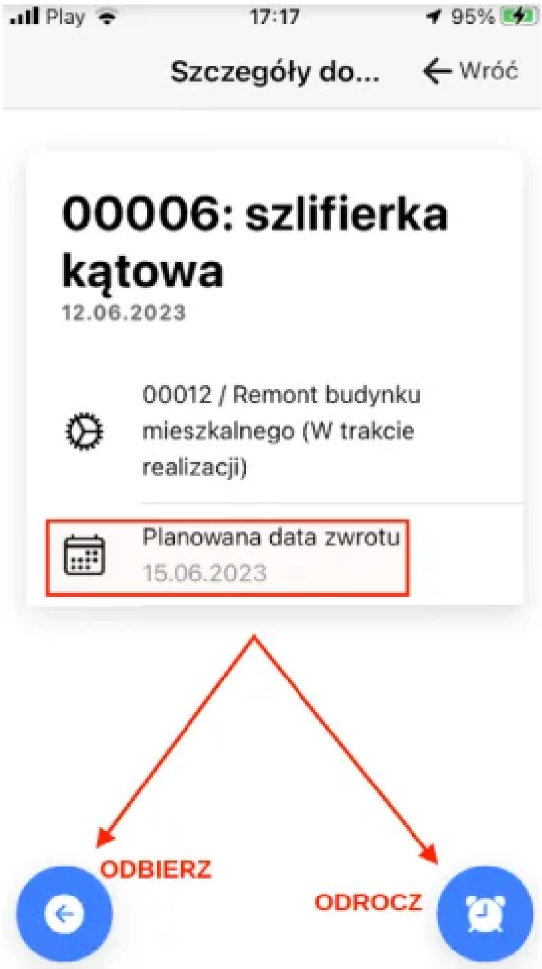
1. Scroll the screen view to the “Equipment Requests” group and select the blue ”+” button at the bottom.



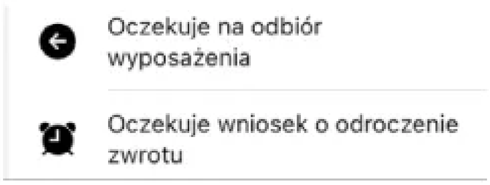
2. Fill out the form by providing the name of the required equipment and specify the borrowing and return dates.

3. Save the data using the “Ok” button.

In the preview of each borrowed equipment, you can request its pickup or change its return date by selecting the options shown in the screenshot below.



After completing and saving the form, one of the following statuses will appear in place of the “Planned Return Date” status.



> **REMEMBER:** The above statuses can only change if the employee responsible for picking up the equipment or changing its return date in the equipment warehouse records this situation in the web system.

> **NOTE:** If two of the above options are selected one after the other for one type of borrowed equipment, the system will automatically record and retain the latest one (entered last).

Account

In this tab, you will find:

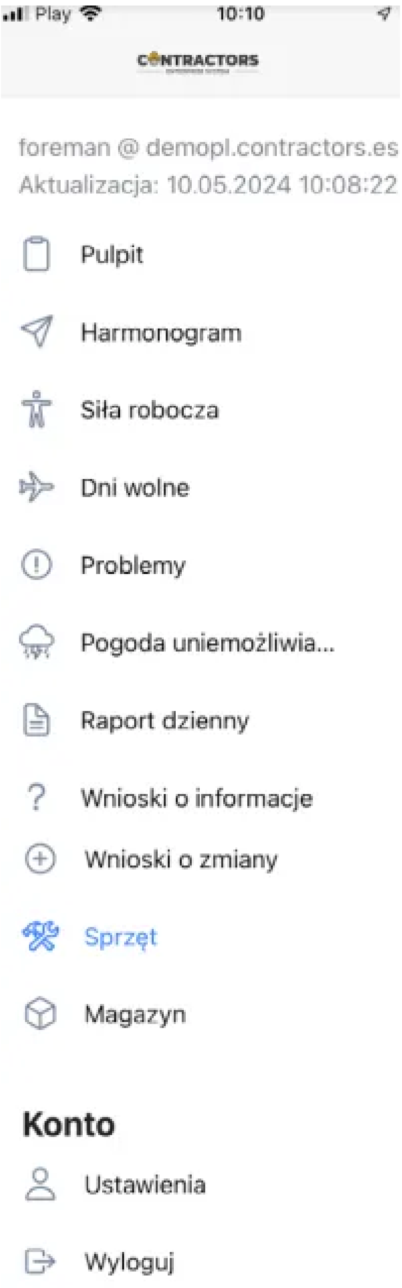
- The “Settings” option, which allows you to change the current password for the mobile application.

- The “Logout” function, which allows you to log out of the application.

> **REMEMBER:** The next time you launch the application after logging out, you will need to enter your login details again.

Foreman Panel

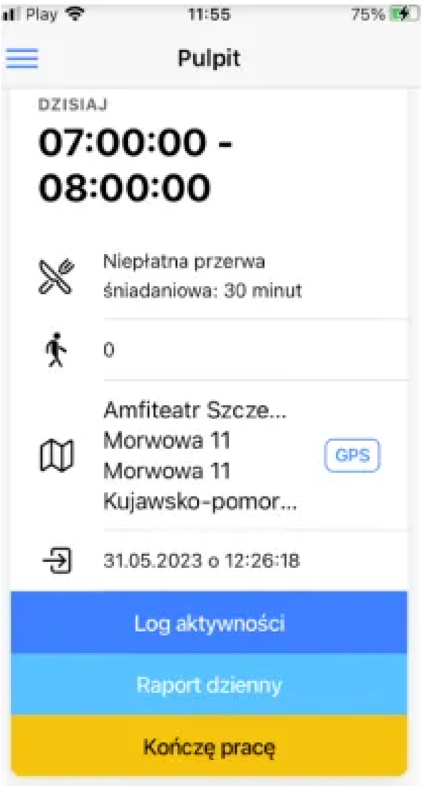
After logging into the mobile application, you will be able to use the modules assigned to your user role. Here is a list of these modules:



You can slide out the list using the menu in the upper left corner of the screen and slide it back by clicking on it again.

Dashboard

In this module, only the work plan for today is visible.



The buttons available below the entry serve the following functions:

- **Activity Log**: A record of the scope of work being performed at the moment. In the "Note" field, you can add information related to the work being done, e.g., laying 30x30 cm tiles.

> **REMEMBER:** Every change in the scope of work during the day should be noted as a new "Activity Log." This way, in the report that includes the employee's scope of work, all tasks performed will be visible with the time allocated to them.

- **Daily Report**: Information on work progress. It should be recorded at the end of the workday. The scheme for creating a daily report is described in the "Reports" module.

> **REMEMBER:** Creating reports allows you to track the profitability of the project and compare actual progress with assumptions.

- **End Work:** The actual end of work time for the day.

> **REMEMBER:** Based on this report, your work time is accounted for, which can be verified in the web system only by authorized users.

Schedule

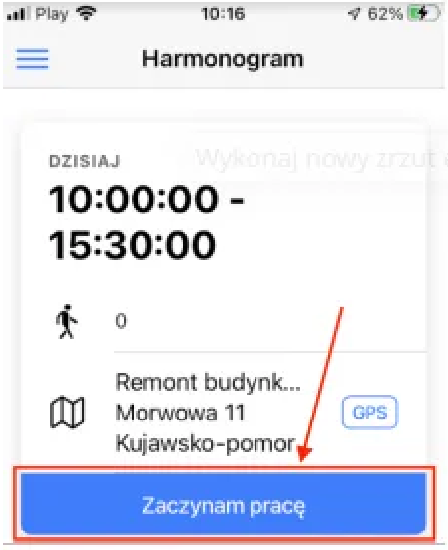
The schedule includes all the work planned in the calendar, arranged in chronological order. The way a given event is presented on the phone screen after starting work is clear and readable.

REMEMBER: Use the GPS navigation available at the address assigned to the work to easily reach the location.

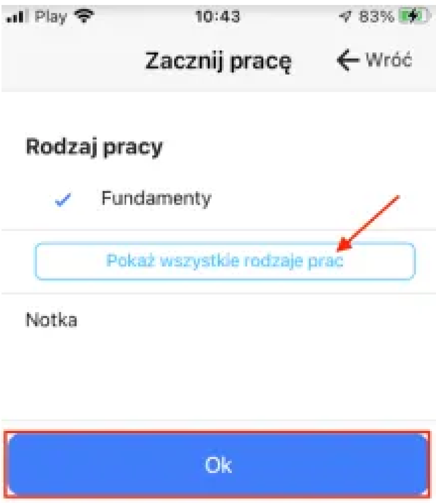
NOTE: You can only start work for the scope of work scheduled for the current working day.

Registering work time on the project will be possible according to the scheme:

1. Start work on the project by clicking the “Start Work” button.



2. Verify the planned scope of work and confirm it with the “Ok” button or make changes by selecting a different option from the dropdown list “Show all types of work”.



The information visible after logging in with a work assignment includes the following data:

- Hourly range for the workday.
- Number of minutes for an unpaid lunch break.
- Workforce allocation.

> **NOTE:** This field is available only when the foreman acts as a subcontractor foreman.

- Construction site address.

> **REMEMBER:** The “GPS” icon works with the Google Maps application, allowing it to be launched in the background.

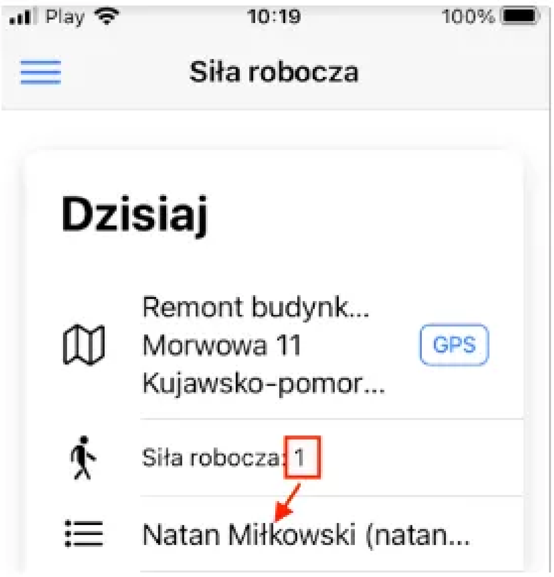
- Time of logging into the application.
- Time range for the last change made in the selected scope of work.

> **REMEMBER:** If several different scopes of work were performed during the workday, a separate entry with dedicated time will be recorded for each.

> **NOTE:** To change the scope of work, use the “Activity log” button.

Workforce

In this module, you will find information about the number of employees assigned to a given project on a specific workday. This allows you to see how many employees should report to the project and how many actually do.



> **REMEMBER:** If a group of employees from our subcontractor is sent to the project, and not from our company, the list will not contain personal data of these employees, only their number.

Days Off

Submitting requests for days off is possible from anywhere and at any time. All leave requests, regardless of their current status, remain on the "Days Off" list. This allows for easy tracking of used leave and remaining days off.

> **REMEMBER:** If you have not submitted any day off, the "Days Off" module will be empty.

The repeatable buttons serve the function of:

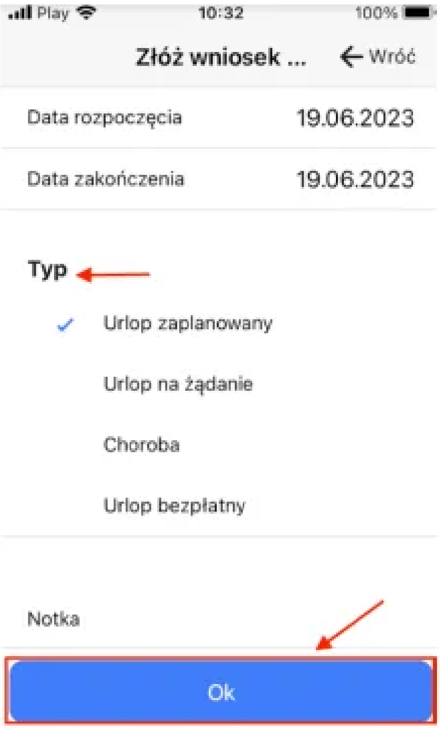
- filtering requests on the list,
- creating a new day off request.

To add a day off request, follow the scheme:

1. Select the blue "+" button at the bottom.
2. Specify the time range on the drop-down calendar, i.e., the start and end date of the planned leave.
3. Choose the "Request Type" from the available options:

- **Planned Leave:** The number of days will be deducted from the employee's available leave days.
- **On-Demand Leave:** A day off requested urgently, in accordance with the provisions of the Labor Code.
- **Sickness:** Absence due to medical leave.

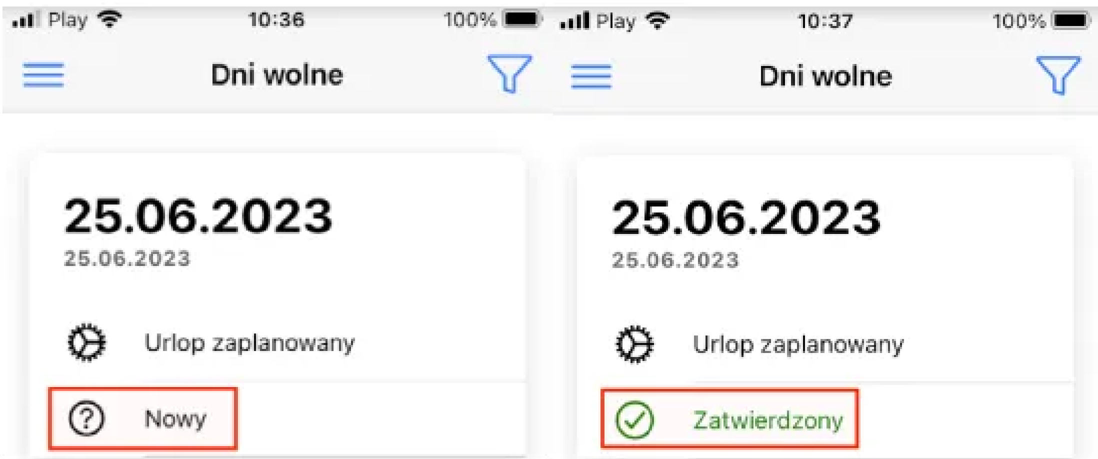
- **Unpaid Leave:** The number of unpaid days available only to employed workers, regulated by the Labor Code, with strict adherence to the rules.



4. Save the data with the “Ok” button.

> **REMEMBER:** Submitted leave requests require approval in the web system by authorized personnel.

A submitted request on the list will be marked as “New.” After the status changes, the update will be visible in the same place.



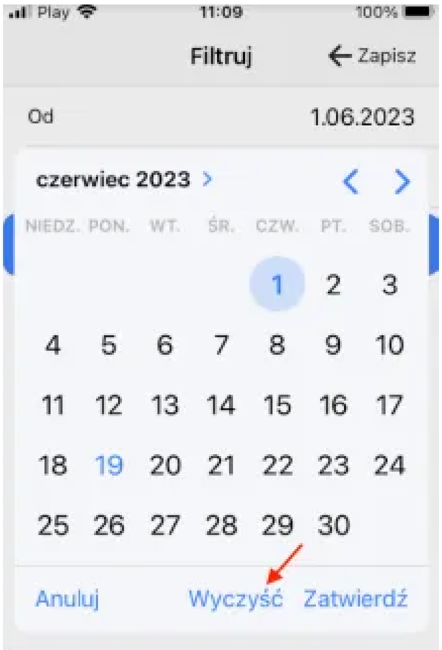
> **REMEMBER:** A submitted and sent request for approval cannot be edited.

NOTE: Before each subsequent search, you must "clear" the request filtering field on the list. The last search settings remain in memory, so without this step, only requests related to the last specified time range will be displayed.

Clearing the previous filtering settings is done as follows:

1. Select the "filtering" function in the upper right part of the screen.

2. Click on the "From" or "To" date field, and then select the "Clear" option under the calendar.



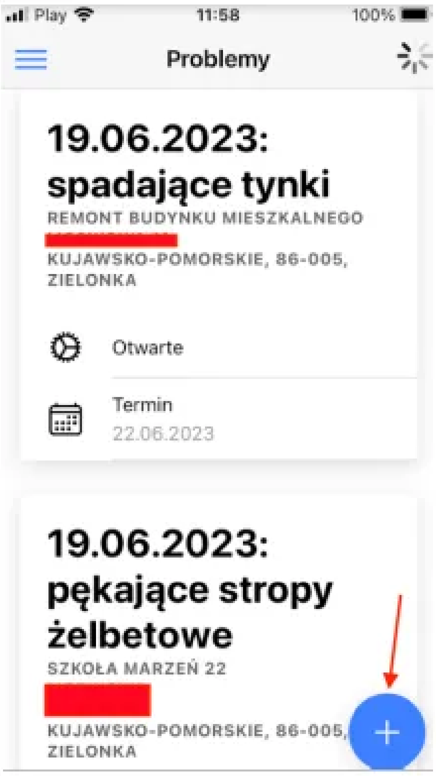
NOTE: If you select a new date range on the calendar and confirm the search, all previous filtering settings will be reset.

Issues

In this module, you can report and view only issues unrelated to weather conditions.

You will create construction issues in the following order:

1. Use the function to create new entries visible at the bottom of the screen.



2. Fill out the displayed form, where the meaning of the fields is identical to those for submissions made through the web system.

> **NOTE:** You can attach photos of the issue using the appropriate field for uploading photos. This feature is not available in the web system.

3. Save the data by selecting the “Ok” button.

> **REMEMBER:** If an issue has been recorded in the web system where you are an “Engaged Employee,” it will be visible in your mobile application.

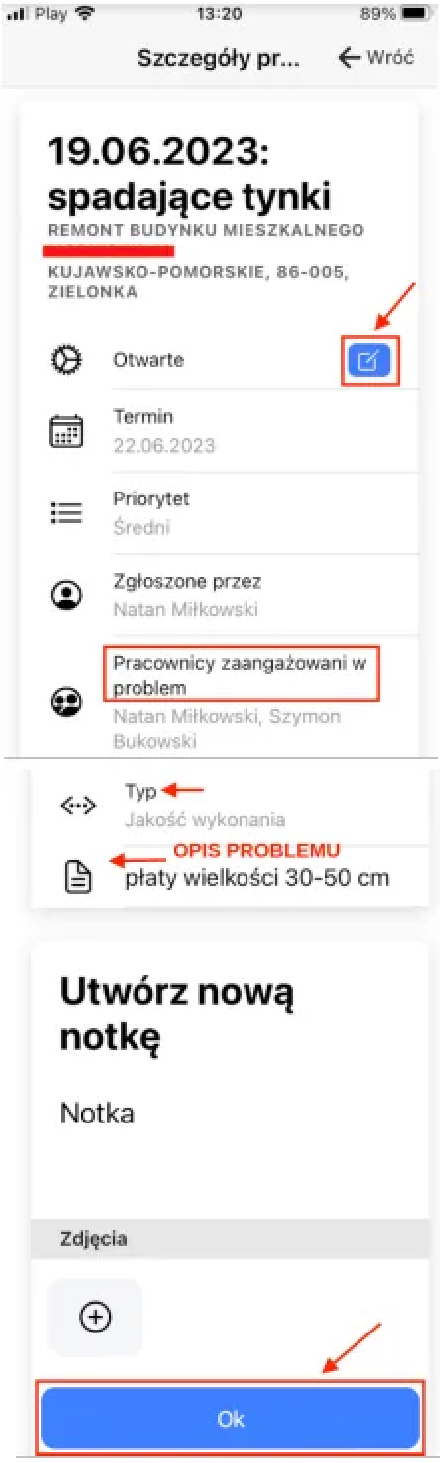
> **NOTE:** The issues on the list are arranged in order according to their resolution deadlines.

To make changes to problem records, follow the sequence:

1. In the “Problems” module, select the entry you want to modify and click on its name.

2. The screen will display the current information, where you can change the current status, add a note, or attach photos.

> **NOTE:** Changing the status for a reported issue is done by clicking the blue edit icon, marked with a red arrow in the screenshot below. After selecting a new status from the list, save the changes with the “Ok” button.



> **REMEMBER:** You cannot edit the entered “Type of problem.” In each subsequently added note for this event, you can specify a new type and scope of work.

3. Save the changes using the “Ok” button.

> **REMEMBER:** You can only add problems to the project you are logged into.

> **NOTE:** Reporting an issue via the mobile application does not allow you to add employees involved in the issue. This feature is only available in the web system.

Weather Preventing Work

It may happen that bad weather conditions prevent the planned work from being carried out on a given day, resulting in a lack of progress in contract execution. The Contractors.es application automatically retrieves weather data from the internet, taking into account the location of the project work.

> **NOTE:** This feature creates a history of reports, which can be useful as explanatory evidence in the event of a change in the project completion date for the Client.

To add a weather-related issue report, follow these steps:

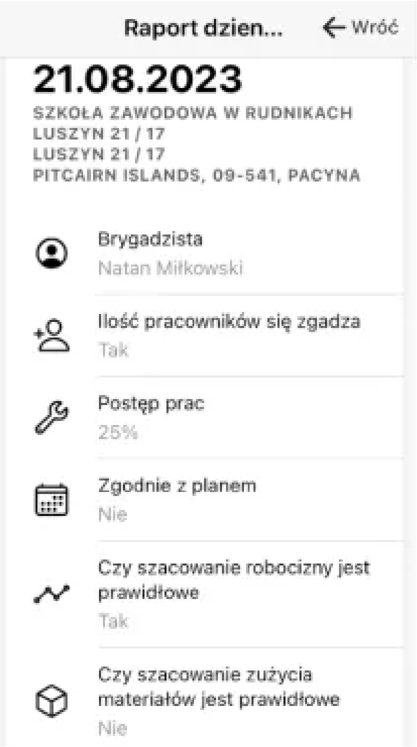
1. Use the record creation function by clicking the blue ”+” at the bottom of the screen.
2. Ensure that the values in the automatically filled fields are correct.

2. Optionally add a note or photo and save the data with the “Ok” button.

> **NOTE:** Created and saved reports cannot be edited or deleted.

Daily Report

Daily reporting of work progress allows tracking the stage of project implementation. The report includes a breakdown of time and financial balance. Its preview on the list contains the information visible in the screenshot below.



NOTE: Daily report entries are visible after the workday ends only in the web system.

REMEMBER: Creating a daily report applies only to the current project. If more than one construction team is working on the same project or their scopes of work differ, it is worth creating separate daily reports.

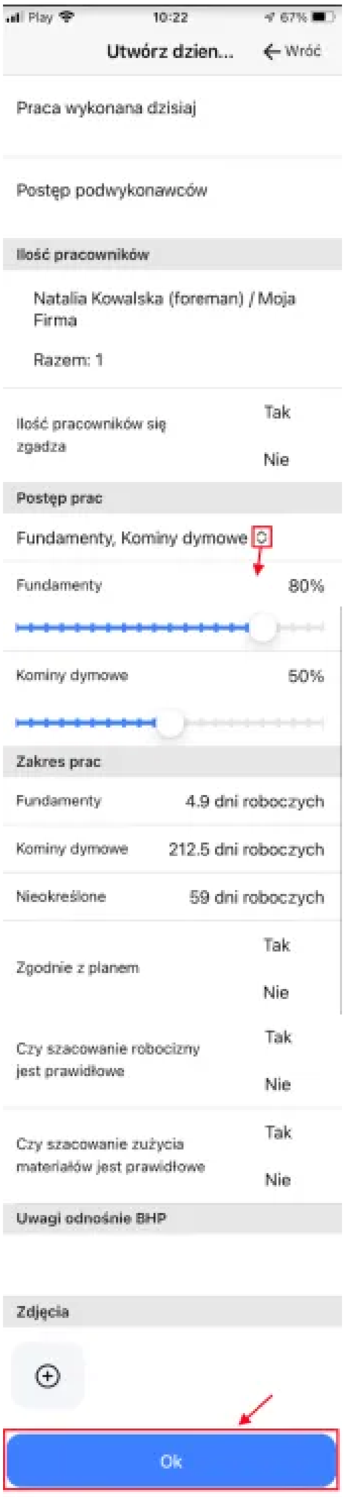
You can enter the daily report into the application as follows:

1. Select the blue ”+” button at the bottom.

2. Fill in the data in the form, paying attention to the fields:

- **Work Progress:** Expand the list of work scopes and use the slider to determine the percentage of their completion.

- **Scope of Work:** After subtracting the estimated amount of work done from the number of days specified in the planner, the number of days remaining to complete the given scope of work will be displayed.



3. Optionally add comments regarding health and safety or photos.

4. Save the data with the “Ok” button.

> **REMEMBER:** You can add a note to the report using the ‘Create a new note’ field at the bottom of the saved entry.

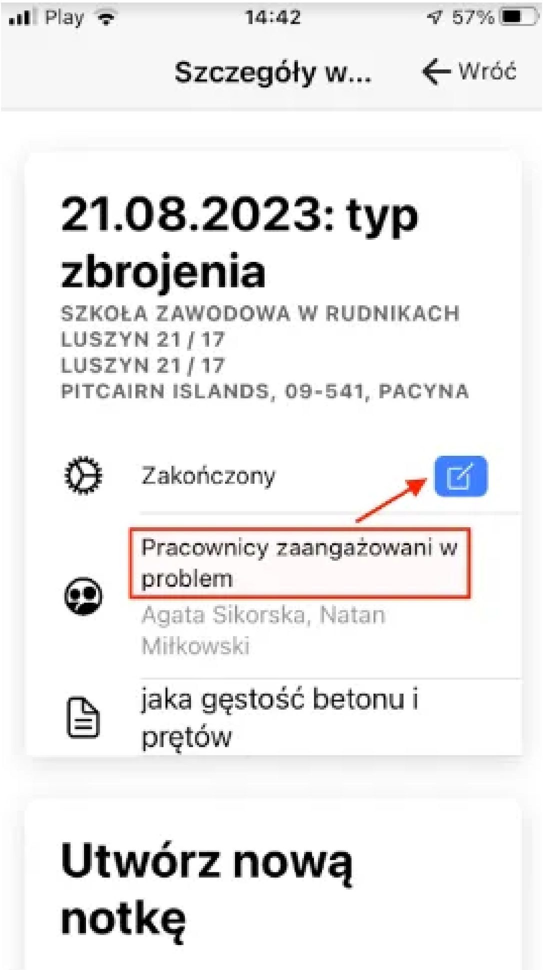
Requests for Information

In the mobile application, you can use a simplified version of creating requests for information. The request form contains three main elements:

- **Title:** Name of the request, e.g., lift certificate.
- **Description:** A question or concern for which you expect an answer.
- **Photos:** You can optionally attach files with photos.

> **REMEMBER:** A submitted request on the list will have the status “Pending.” After being verified by a person with the appropriate permissions, its status will change, for example, to “Completed.”

> **NOTE:** On the “Information Requests” list, all requests in which the logged-in foreman is involved, as well as those he created himself, will be visible.



> **REMEMBER:** You can change the name of the report and add a note before changing its status.

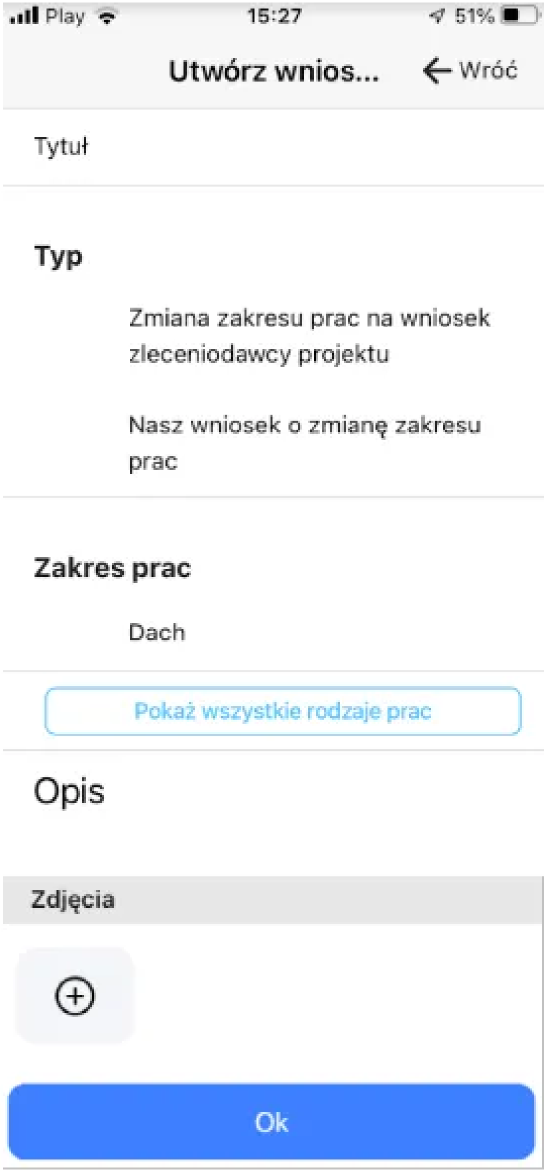
Change Requests

Project implementation may require changes or corrections that can affect the final stage of the ongoing work. The type of report depends on:

- **Type:** The entity submitting the request. It can be the Client or the Contractor.
- **Scope of work:** Changes in the scope of work resulting from modifications in the project.

> **REMEMBER:** Accepted change requests will impact the final settlement of the project.

The form available in the application for creating a change request looks as follows:



> **REMEMBER:** All submitted change requests in projects are automatically sent to the cost estimator associated with the given project. The cost estimator makes changes, which are then forwarded for the Client's approval.

> **REMEMBER:** You cannot change the name of the report. After saving it in the application, you will be able to add further notes to it, but only until its status changes.

Equipment

In addition to recording material consumption and assigning employees, the foreman has the ability to:

- Report equipment needs for the current project.
- Postpone equipment return deadlines.
- Receive borrowed equipment from other projects.

NOTE: You can only register equipment needs from the location where you are currently logged into the project. For other projects, the web application should be used for this purpose.

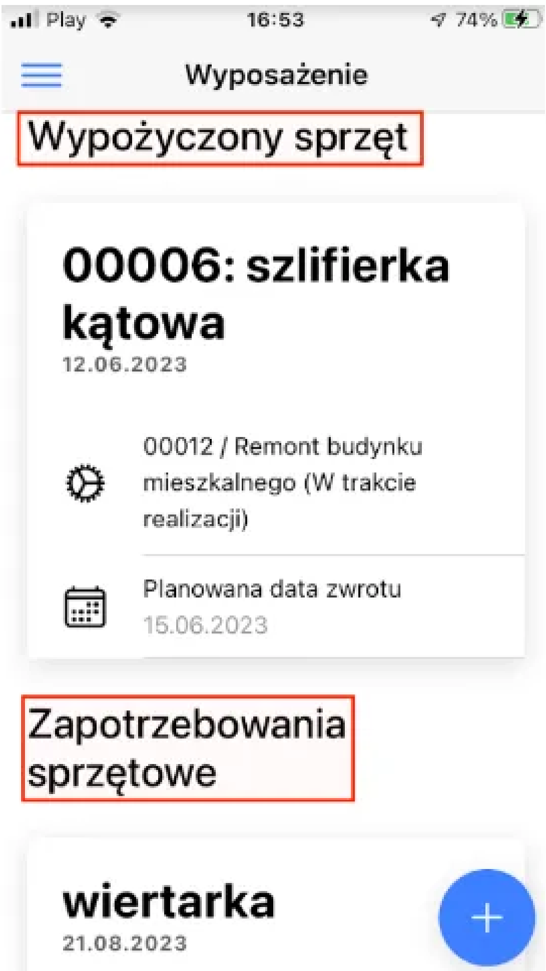
On the equipment list, there are two subgroups available:

- Currently rented and issued equipment from the warehouse, for which the logged-in Foreman is responsible for returning to the equipment warehouse, regardless of the project type.

NOTE: The list only includes those devices for which equipment requests have been previously submitted and fulfilled by an authorized person using the web application.

- Reported equipment requests awaiting fulfillment by an authorized user of the web system.

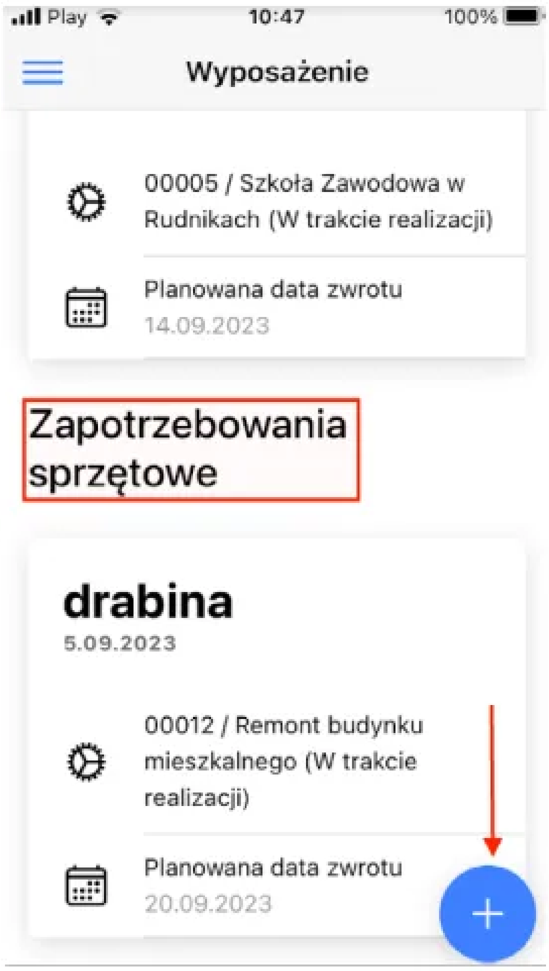
NOTE: Upon receiving a field worker's request regarding the pickup of expected equipment, for which the status has been changed, you can begin fulfilling the equipment request.



REMEMBER: Using the "Equipment" module while planning your workday will make it easier to manage equipment across different projects. You can pick up, deliver, transport, or return it to the warehouse according to current requests.

To submit an equipment request, follow the steps:

1. Scroll the screen view to the “Equipment Requests” group and select the blue ”+” button at the bottom.



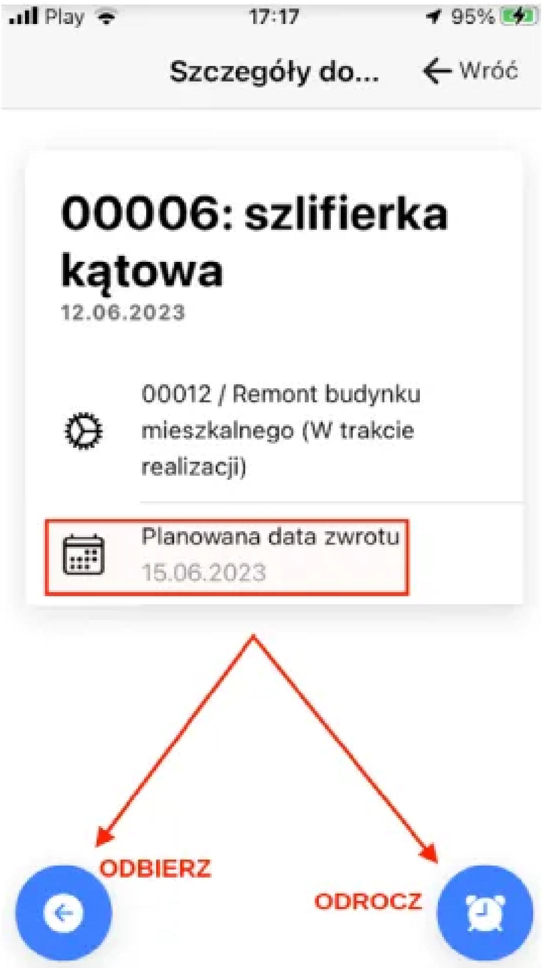
2. Fill out the form by providing the name of the required equipment and specify the rental and return dates.

3. Save the data using the “Ok” button.

NOTE: If you want to submit an equipment request for a project other than the one you are currently logged into, log out from the current location and log into the selected project, provided you are assigned to it on that day. You can also submit requests using the web application, where there are no restrictions.

REMEMBER: After changing the “Equipment Request” status, the equipment will automatically appear on the “Rented Equipment” list.

In the preview of each rented equipment, you can note its pickup or change the planned return date by making a selection according to the screenshot below.



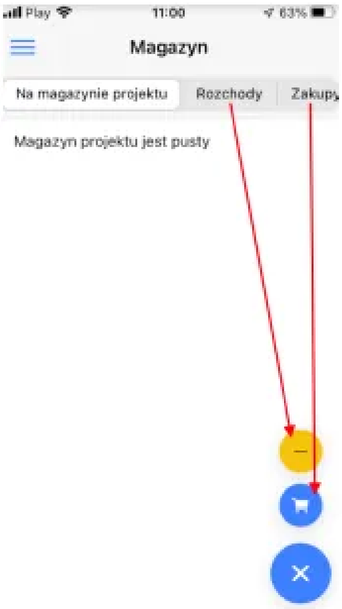
After completing and saving the form, one of the following statuses will appear in the “Planned return date” status field.

> **REMEMBER:** The above statuses can only change if the employee responsible for collecting the equipment or changing its return date in the equipment warehouse records this situation in the web system.

> **NOTE:** If two of the above options are selected one after the other for one type of rented equipment, the system will automatically record and save the latest one (entered last).

Warehouse

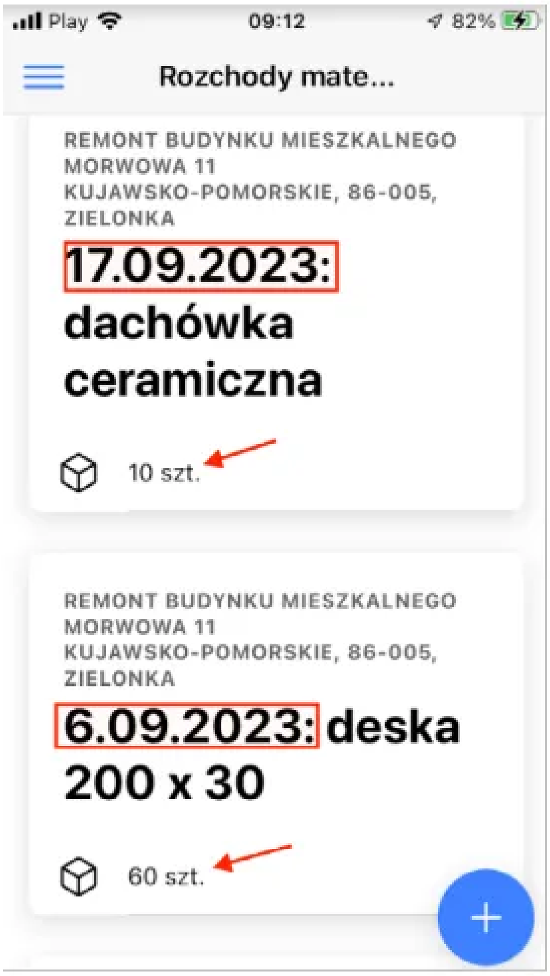
In this module, you will be able to track the quantities of materials entered for the project, register their consumption, and place orders for goods that have directly arrived at the construction project being carried out.



REMEMBER: Material consumption for a specific project is only possible if its warehouse stock is positive. If the required goods are not available in the project warehouse, a request for the required quantity should be made.

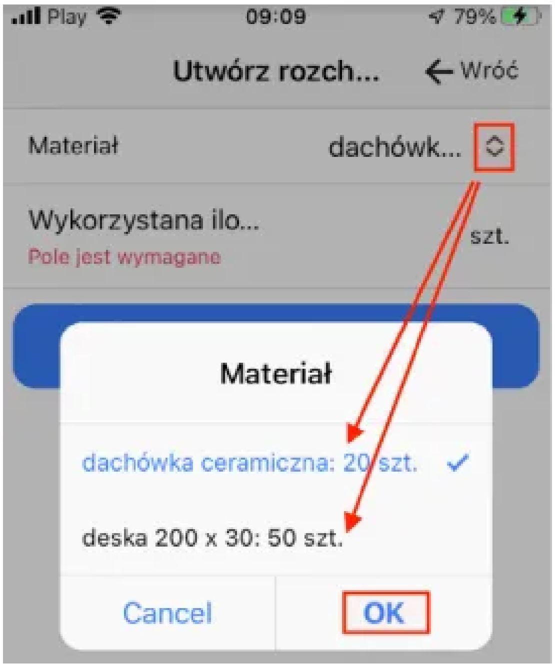
NOTE: Warehouse stocks for projects are replenished solely through the web application based on the created estimate.

The list of consumptions shows the dates, names, and quantities of materials used.



Registering daily material consumption is done according to the following procedure:

1. Go to the “Consumptions” module and select the blue ”+” button at the bottom. The current warehouse stocks assigned to the project will be retrieved in the background.
2. In the “Material” field, use the marked arrows in the screenshot below to expand the list with the quantity of materials that should be available for the project.



3. Select the type of material whose consumption you want to record and click “Ok”. It will be marked with blue font color.

4. In the “Used Quantity” field, enter the value indicating current usage and save the selection with the “Ok” button.

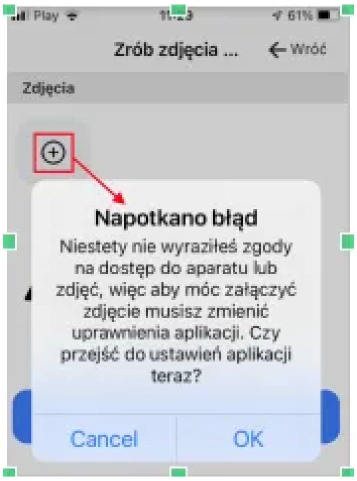
NOTE: You cannot edit records where the quantity of material used has been specified.

REMEMBER: By using the document upload function via the mobile app, you can quickly and easily register delivered goods in the system. This means that materials delivered to the construction site can be used immediately, as the uploaded file is automatically registered in the “Warehouse -> Purchases” menu.

To add a purchase receipt to the application, follow these steps:

1. Select the “Purchases” tab in the warehouse module.

2. Click on the field marked in the screenshot below.



> **NOTE:** If you did not set the application permissions correctly during its installation on the mobile device, an appropriate message will be displayed.

> **REMEMBER:** Without permission to access photos from your phone, this function will be unavailable.

3. Optionally adjust the settings and add photos of the document.

> **NOTE:** If the document has multiple pages, upload them all at once and arrange them in order.

4. Save the data using the “Ok” button.

Account

In this tab, you will find:

- The “Settings” option, which allows you to change the current password for the mobile app.
- The “Logout” function, which allows you to log out of the application.

> **REMEMBER:** When you start the application again after logging out, you will need to enter your login details again.

Frequently Asked Questions

1. **Can I use the Contractors.es app without creating an account first?**

   No, to use the Contractors.es app, you must have previously created an account in the web version of the system. However, you can test the app in demo mode without creating an account.

2. **What operating systems are supported by the Contractors.es app?**

   The Contractors.es app is available for mobile devices with Android and iOS systems. It can be downloaded from Google Play and the App Store.

3. **Do I need to enable notifications sent by the app after installing it on my mobile device?**

   Enabling notifications will allow the system to send you current notifications or changes related to work assignments, which you will be informed about in real-time.

4. **Why am I not receiving notifications from the app?**

   Make sure you have notifications enabled for the Contractors.es app in your mobile device settings and that the app is updated to the latest version.

5. **What data is needed to log in to the Contractors.es mobile app?**

   To log in, you need the Contractors.es name (the "XXX" part of the company address), your login, and the password used to log in to the web version of the system.

6. **What should I do if I forget the password to the Contractors.es mobile app?**

   In this situation, you must use the "Password Reset Form" function available only in the web version. Without setting a new password, access to the mobile version will be impossible.

7. **Can I use the app on more than one device?**

   Yes, you can log in to the Contractors.es app on more than one device using the same login data.

8. **What happens if the app runs "in the background" and I don't log out after finishing the workday?**

   It is not recommended to log out after each workday. The app does not run in the background and does not consume additional phone battery. Notifications are handled by the phone system. The "End Work" button is sufficient to record the work time needed to calculate your salary.

9. **What will I see in the demo version?**

   In the demo version, you will be able to browse sections dedicated to field workers and foremen. Most of the functionality in them will only be available after starting work, which means pressing the "Start Work" button in the Schedule section.

10. **How can I change my password in the mobile app?**

    You can change your password using the settings available in the "Account" tab.

11. **Does logging into the app start the work time on the project?**

    No. Simply logging into the mobile app does not mean starting work on a given day. For your work time to be recorded and financially accounted for, you must also log into a specific project by clicking the "start work" button on the appropriate work assignment.

12. **How is the work time of an employee logging into the app accounted for?**

    Each start and end of the workday in the Schedule section records the time frame during which the employee was available on the project. Employees with appropriate permissions logged into the web application can control the registered entries and modify them accordingly, e.g., if an employee left work earlier and logged out at a location distant from the project or forgot to log out.

13. **How will I know that my day-off request has been processed?**

    It will receive the status "Approved."

14. **What is the "Activity Log" for and how do I use it?**

    If during the day you perform several work scopes with different billing rates, use the "Activity Log" button. It is visible after starting work in the Schedule section. This way, the billing rate will be considered according to the actual time spent performing the given work.

15. **How to report issues related to ongoing projects?**

    To report an issue, go to the "Issue Reports" module, describe the problem, attach any photos, and send the report to the responsible person.

16. **What to do if the application is not working properly?**

    If the application is not working properly, try restarting your device, updating the application to the latest version, or contacting technical support.

17. **Why can't I request materials or equipment for the next location with an allocation?**

    Requests can only be registered from the current project login location. For other projects, use the web application for this purpose.

18. **What to do if I accidentally ended work but am still on the project and continuing the assigned scope of work?**

    To continue recording work using the mobile application, contact the office to reset the "Actual work completion" field or request them to manually set it to the actual work completion time.

19. **How will I know that my equipment request has been fulfilled?**

    The requested equipment will appear on the "Borrowed Equipment" list.

20. **Can I register both the receipt and the postponement of the return date for one piece of equipment at the same time?**

    Yes. You can choose both options, one after the other, but the system will record and keep the latest one (entered last).

21. **How to change the scope of work during the current workday?**

    After starting work, expand the “Show all types of work” list and select the type of work that the change concerns. Hourly rates will be settled according to the change you made.

22. **Why don’t I see the names of employees next to the number of people listed under “Workforce”?**

    If a group of employees is sent to the project by our subcontractor and not from our company, the list will not contain personal data of these employees, only their number.

23. **Can I change a submitted day-off request?**

    No. A submitted and sent request for approval cannot be edited. Contact your supervisor or the appropriate department of your company to make changes.

24. **How to upload photos to issue entries?**

    Use the appropriate field when creating an entry. Preview photos can only be uploaded using the mobile app. Although photos are visible in the web system, it does not have this function.

25. **Who can see issues reported via the mobile app?**

    Issues are visible on the lists of employees designated as “involved in the issue.” If an issue is recorded in the web system where you are an “Involved Employee,” it will be visible in your mobile app.

26. **How to change the status of a reported issue?**

    Use the blue edit icon next to the status of the selected issue and make the appropriate changes.

27. **Can I change the name of an issue registered in the app?**

    You cannot edit the entered “Type of issue.” In each subsequent note added for this event, you can specify a new type and scope of work.

28. **Why can’t I add employees involved in the issue?**

    This system function is only available to people with the appropriate permissions in the web application.

29. **What are the daily reports about?**

    Recording daily reports allows you to determine the progress of work on the project, including the total working time and finances and costs associated with its implementation.

30. **How to create a balance for two independent work crews?**

You can record several daily reports for the same project. If the scopes of work for the work crews are different, create separate reports for each of them.

31. **What is on the “Requests for Information” list?**

    The “Requests for Information” list will show all requests in which the foreman logged into the app is involved, as well as those he created himself.

32. **Where does the list of materials on the project come from and how is it updated?**

    Inventory levels for projects are supplemented exclusively via the web application based on the delivery of goods to the project warehouse.

33. **How do I check the amount of material that should be available on the project and what to do if there is not enough?**

    When creating a material issue, the available quantity for each material is recorded. If the material quantity is insufficient, you need to create a material request using the web application. Only after its status is changed can you continue using it on the project. If the actual state does not match the state in the application, you should agree on what to do with your supervisor - in the web application, you can conduct a warehouse inventory and adjust the available quantities.

34. **How do I upload a proof of purchase or delivery using a saved photo of the document?**

    Go to the “Purchases” tab in the warehouse module and select the option to upload photos. If the document has more than one page, arrange the photos in the correct order when uploading them to the system.

35. **Why can’t I upload purchase photos?**

    Make sure you have allowed access to photos or the camera on your mobile device. Without permission, this function will be unavailable.