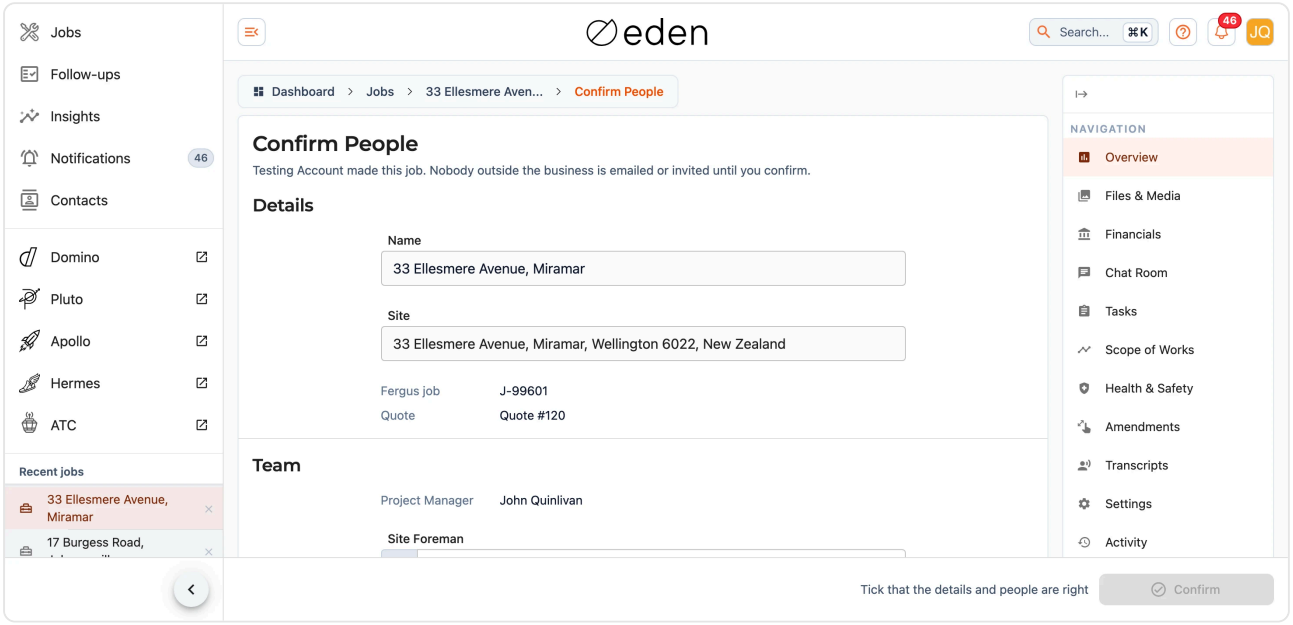
Confirming a New Job's People

EST. 4 MINUTE READING TIME

The project manager on a job knows who outside the business should hear about it and how, so they are the one who decides who the job's progress emails go to and who is invited to *EDEN*. When somebody else creates a job, they can still propose the insurer, the loss adjuster, the claimant and anybody else involved, but those people wait until the project manager confirms them. Until then nobody outside the business is emailed about the job, invited to it, or able to open it.

The project manager is sent a text and an email with a link to the job's **Confirm People** page, and can also reach it from the job's settings.

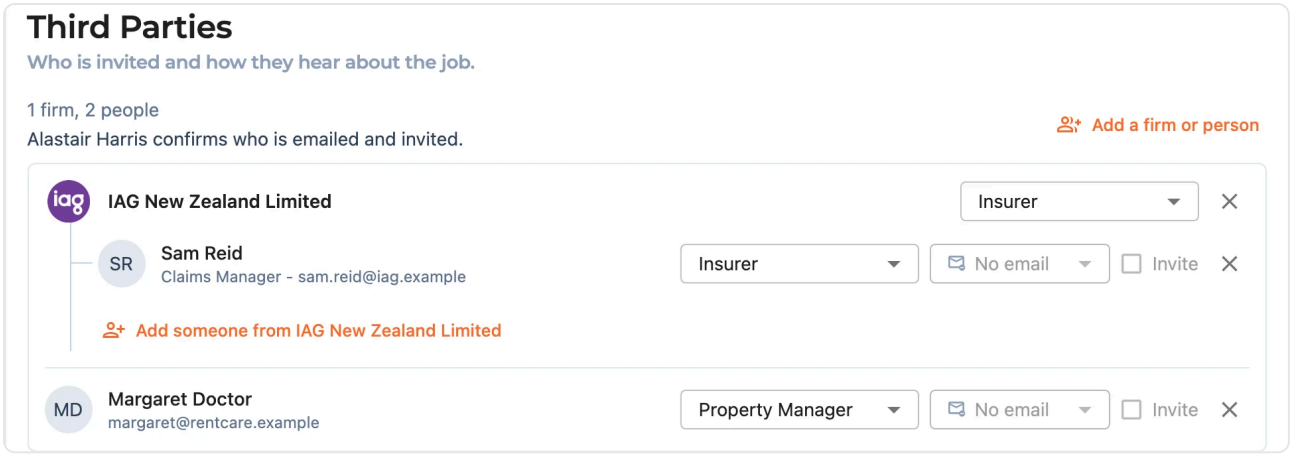


The Confirm People page, with the job's details and team at the top.

Creating a Job

Every job needs a project manager, so pick one under **People** on the New Job page before you press `Create Job`. The same goes for a job created from *ATC* when a quote is accepted or a works request asks for an *EDEN* job.

If you are the project manager, the **Third Parties** section works as it always has: choose each person's progress email from the envelope beside their name and tick `Invite` for anybody who should be invited. If somebody else is the project manager, you can still add and remove firms and people and give them their roles, but the envelope reads `No email`, `Invite` cannot be ticked, and the section names the project manager who will confirm them.



When You Are Asked

The project manager is asked by text and email as soon as the job is created, and reminded each working morning until they confirm, with weekends and public holidays skipped. After two working days the job's regional manager is asked too, or our health and safety team where the job has no regional manager, and from then on they can confirm in the project manager's place.

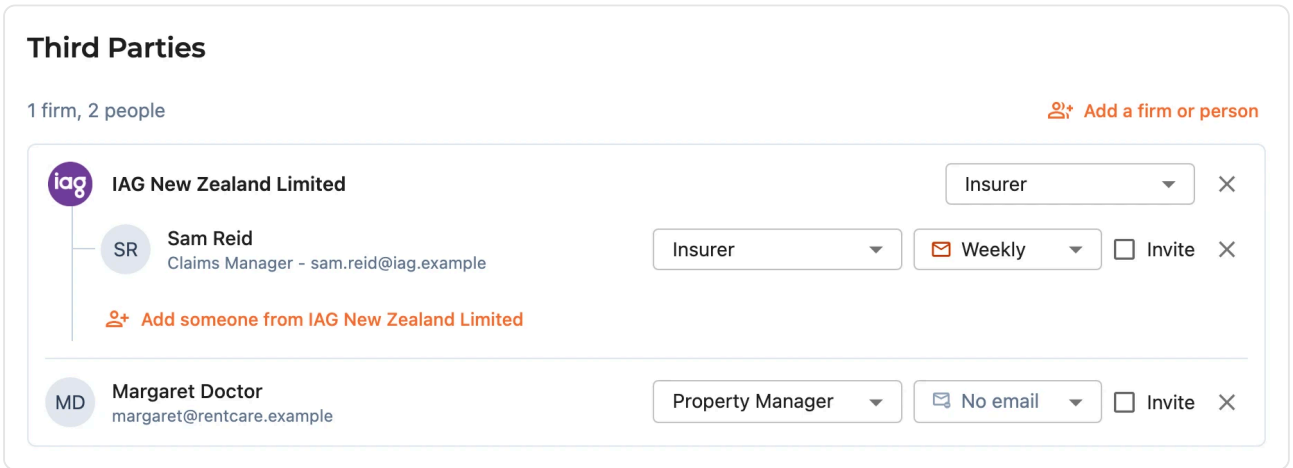
While the people wait, the job shows `Pending` under **Parties** on Follow-ups and stays on **Needs attention** until somebody confirms them.

Confirming

The page is laid out in three parts, which you check from top to bottom.

Under **Details** are the job's name and site, which you can correct, and the Fergus job and the quote, safety plan or scope it was created from, which are there for you to check against. Under **Team** you are shown as the project manager, with the site foreman and the regional manager, either of which you can change if they are wrong.

Under **Third Parties** are the firms and people that were proposed when the job was created. Each person's progress email and invitation are filled in from the rules our team keeps in the contacts directory, for example a weekly email for an insurer's claims manager, and you can change either, change their role, remove them, or add somebody with `Add a firm or person`.

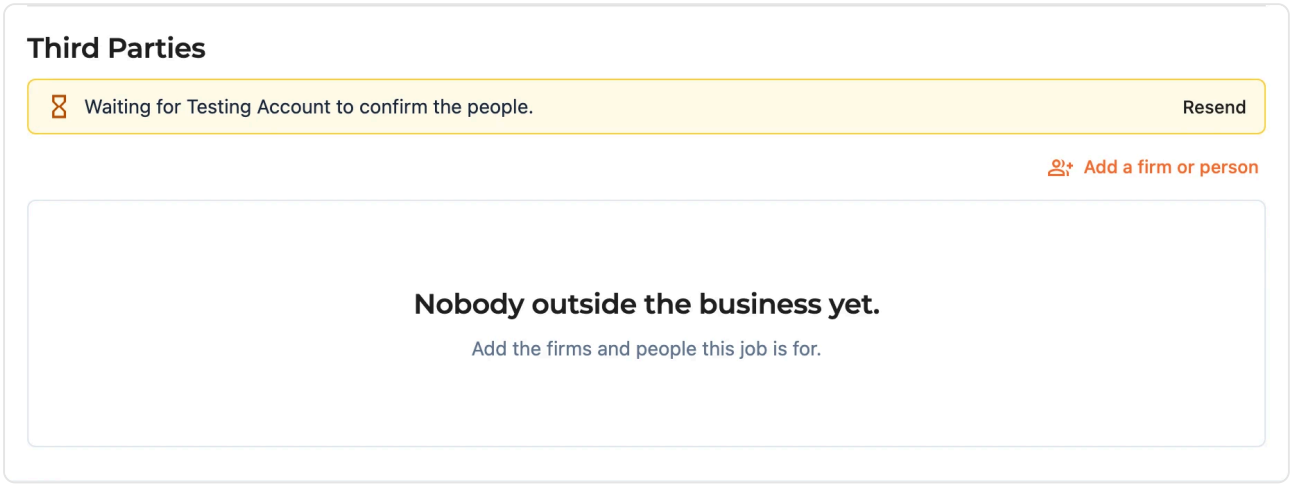


When everything is right, tick `The details and people are right` and press `Confirm`. Everybody you kept is added to the job with the progress email and invitation you chose, and you are taken to the job's **People** settings.

Note: somebody our contacts directory says is never invited, such as a firm's shared mailbox, cannot be invited from here either. Leave `Invite` unticked for them and confirm again.

Waiting on Somebody Else

Anybody else who manages the job sees a band above **Third Parties** in the job's settings saying who it is waiting on. `Resend` sends the text and email to the project manager again, and to the regional manager as well once they have been asked. The project manager sees `Confirm people` in the band instead, which opens the page.



If you get stuck, email us at support@samconsulting.co.nz.