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Contractors

(Tantum eruditi sunt liberi)

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Contractors

Create a Contractor

Select the criteria you require for the new contractor from the contractor type drop down menu. Enter the branch that they will be linked to.

Use contractor type drop down menu to select required type

The Contractor commission % details should only be filled in if you, as the agent, are going to add a commission to the job cost arranged with the contractor.

Complete the contact details and finally add any notes, (these are confidential, for agency staff only).

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CONTRACTOR DETAILS CONTACTS LIST AREAS OF OPERATION

CONTRACTOR DETAILS

Contractor Type: Maintenance
Default Branch: Branch C
Contractor Commission %: 0.00

CONTACT DETAILS

Title
Forename
Middle Name
Surname
Nationality: United Kingdom
Date of Birth
Email
Mobile Number
National Insurance
EMail Letters
Opt out of general marketing

CONFIDENTIAL NOTES

CONTACTS LIST

Permanent Address **Mandatory Contacts**
Permanent Address

PERMANENT ADDRESS

12 High Street Land Phone: -
Cathays Fax Phone: -
Cardiff Valid: 11/02/2008 - To Date
CF24 4AY
United Kingdom
Notes: -- None --

The next step is to add a permanent address for the contractor (mandatory). This can be edited at any time, however once a contractor has been added and has been assigned a job they cannot be deleted as the record will need to be kept for historic checking.

AREAS OF OPERATION

Tick here to assign all Areas on this page to the Contractor (repeat for each separate page).

<input type="checkbox"/> arifield
<input type="checkbox"/> Bridgend
<input type="checkbox"/> Brixworth
<input type="checkbox"/> caerphilly
<input type="checkbox"/> Chester

Add areas that the Contractor will cover by ticking the boxes beside the areas covered. If the area you require is not shown then you will need to add an area. This will be done by accessing Lettings/Property/Manage

Areas.

Finally enter the bank details of the contractor. This will facilitate online payments etc.

View Contractors Details

Like other View Details screens this is purely to use for checking contractors details. You will not be able to edit from this screen. Using the standard Search criteria select your Contractor and from the list of given contractors tick the box next to the contractor you wish to view then click **Next**.

SEARCH CRITERIA	
Forename:	<input type="text"/>
Surname:	<input type="text" value="a"/>
Branch:	<input type="text" value="Branch C"/>
User Type:	<input type="text" value="Contractors"/>
<input type="button" value="search"/>	
RESULTS	
Name	
<input type="checkbox"/>	Very Handy Contractor at '12, CF61 1BB' of type Maintenance
<input type="checkbox"/>	Bright Spark Contractor at '12 High Street, CF24 4AY' of type Maintenance

On the next screen you will be able to see from the bar at the top what details you will be able to view.

As you go through the various screens (by clicking next each time you will be able to view the Contractor Details, which will show maintenance type, commission (if any) and any staff notes for this contractor.

Contact Address, permanent address. Areas of Operation, (where the contractor operates) and their bank details.

Click on **Finish** to stop viewing details.

Modify Contractors Details

This function is accessed for the purpose of modifying contractors' details. You will be able to edit from this screen. Using the standard Search criteria select your Contractor and from the list of given contractors tick the box next to the contractor whose details you wish to view then click **Next**.

SEARCH CRITERIA	
Forename:	<input type="text"/>
Surname:	<input type="text" value="a"/>
Branch:	<input type="text" value="Branch C"/>
User Type:	<input type="text" value="Contractors"/>
<input type="button" value="search"/>	
RESULTS	
Name	
<input type="checkbox"/>	Very Handy Contractor at '12, CF61 1BB' of type Maintenance
<input type="checkbox"/>	Bright Spark Contractor at '12 High Street, CF24 4AY' of type Maintenance

The top bar on the next screen will once again show you the steps you will go through to enable modification of the contractor's details.

As you go through the various screens (by clicking next each time you will be able to edit the details for that particular screen.

You can now edit:

- Details including commission
- Contact addresses
- Areas of Operation
- Bank Details

Click on **Finish** to stop modifying details

Delete a Contractor

If you have added a contractor by mistake you can delete but only if the contractor has not been linked to any jobs or areas of operation. The process of deletion is carried out in two steps



Using the standard search criteria select your contractor to delete by ticking the box next to their name.

SEARCH CRITERIA	
Forename:	<input type="text"/>
Surname:	<input type="text" value="Car"/>
Branch:	<input type="text" value="Branch C"/>
User Type:	<input type="text" value="Contractors"/>
<input type="button" value="search"/>	
RESULTS	
Name	
<input type="checkbox"/>	Will Carpenter Contractor at '21 Plank Street, CF52 9KK' of type Maintenance

When you have selected the contractor you wish to delete click **Next**. You will now see one of two messages

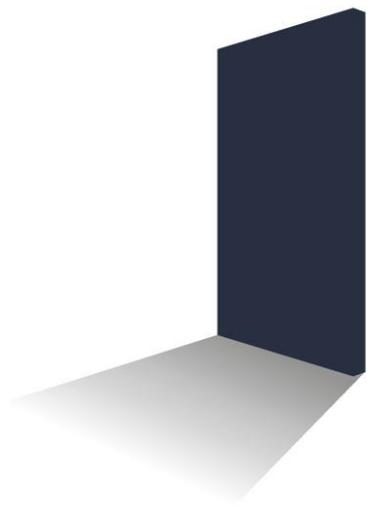
Are you sure you want to delete this contractor: Will Carpenter, Contractor at '21 Plank Street, CF52 9KK' of type Maintenance

This contractor can NOT be deleted, because their details have been used elsewhere e.g. They may have a maintenance job linked to them, or they may be linked to an utility area / tenancy.

Choose another contractor or click Cancel to close this wizard.

On the confirmation screen you will be asked to confirm the deletion, which means that the contractor is not linked to anything in the system and you can click **Finish** to complete the deletion.

The other message you may see is the one shown above. This means that somewhere in the system the contractor is linked to a job or an area. If they are just connected to an area you can edit their details and remove them from that area, you can now delete the contractor. If they are linked to a job on the system then they cannot be deleted as the information they are linked with may be required at a later date. Click Cancel to end the process.



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