

Adding Trades to a Subcontractor

Adding Trades to a Subcontractor is an important step in defining the specific skills, expertise, or services that a subcontractor can provide within your system. This ensures that each subcontractor is properly categorized and can be accurately assigned to work orders, warranty claims, or maintenance tasks that require their particular trade.

Please find attached the video in [Adding Trades to a Subcontractor](#).

Follow these Steps in Adding Trades to a Subcontractor: [Adding Trades to Subcontractor.pdf](#)

1. Click "**Contacts**"
2. Click "**Resources**"
3. Select "**Plumbers Choice**" as a sample Subcontractor
4. Click "**Resources**"
5. Click "**Add Resources**"
6. Select the desired "**Trade Types**"
7. Click "**Add Row**" for SLA hours
8. Enter desired "**Start Time**"
9. Click "**Select**" after choosing the Start Time
10. Enter desired "**End Time**"
11. Click "**Select**" after choosing the End Time
12. Click "**Save Resource**"
13. Here you can see that the Trade Types you added for the selected Subcontractor have been successfully added

□ **Tips for Adding Trades to a Subcontractor:**

- **Verify Subcontractor Qualifications**
 - Ensure the subcontractor is certified or skilled in the trade before assigning it.
- **Select Relevant Trades Only**
 - Choose trades that accurately reflect the subcontractor's expertise (e.g., Electrical, Plumbing, Carpentry).
- **Assign Multiple Trades Judiciously**

- Only add additional trades if the subcontractor is qualified to perform them. Avoid overloading the profile.
 - **Update Trades Regularly**
 - Review and revise trades whenever subcontractors gain new skills or change their service scope.
 - **Use Consistent Naming**
 - Maintain standardized trade names for clarity and easy filtering in the system.
 - **Document Supporting Details**
 - Attach licenses, certifications, or notes for verification and compliance if necessary.
 - **Check for Duplicates**
 - Ensure you are updating the correct subcontractor profile to prevent duplicate entries.
 - **Confirm and Save Changes**
 - Review all selected trades carefully before saving to ensure accuracy.
 - **Align Trades with Task Requirements**
 - Make sure assigned trades match the types of work that the subcontractor will be tasked with, ensuring efficiency and proper workflow.
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