

GUIDE



CLIENT PORTAL

How to View
Contractor Profile

To find out more visit
alcumus.com

NEW CONTRACTORS - HOW TO VIEW CONTRACTOR PROFILE

The profile is your main source of information regarding the contractor. The top portion is your status update on the following:

GENERAL INFORMATION

- Membership status
- Membership Expiry (Contract End Date)
- Anchor Status
- Insurance Status
- WCB Status
- Accreditation Status
- Accreditation Expiry
- Your notes and warnings
- CS Assessment Complete will indicate if they have completed the client assessment.

ACCOUNT
Toronto Service - Demo

GENERAL INFORMATION

Tagged as Favourite ☒

Warning ☐

Warning Notes

Membership Status
Member

Contract End Date 03/03/2020

Anchor Status Approved

Insurance Status Current

WCB/CSST Current

CS Assessment Complete ☒

Accreditation Status

Accreditation Expiry Date

Edit Unfavourite

PROFILE INFORMATION

Below the General Information you will find the contact information and the contractor's responses to our profile questionnaire regarding their company.

The profile will also state the Provinces and Work Activities that they selected.

PROVINCES AND WORK ACTIVITIES INFORMATION

Provinces

Ontario

Work Activities

Air Conditioning;Audio and Visual Systems - Installation, Maintenance;Basement Renovations;Cabinet Installations;Carpentry;Carpet Cleaning;Welding

FAVORITE CONTRACTORS

- To tag a contractor to your Favorite list, go to the Contractor profile page and click MAKE FAVOURITE. To remove a contractor as a favorite, go back to the profile and click the UNFAVOURITE button and they will be removed from the list.
- On the home page, under the graphs you will see the listing of all contractors. Click FAVOURITE CONTRACTORS and you will only see those that you have marked as favorite.
- Favorite list is unique to the user and can be altered as you wish.

The screenshot shows the Contractor profile page for 'Toronto Service - Demo'. At the top right, there are 'Edit' and 'Favourite' buttons. The 'Favourite' button is circled in orange. Below the profile header, there is a 'GENERAL INFORMATION' section with fields for 'Tagged as Favourite', 'Warning', 'Warning Notes', 'Anchor Status', 'Insurance Status', 'WCB/CSST', and 'CS Assessment Complete'. Below this, there are three tabs: 'Contractors', 'Favourite Contractors', and 'Properties'. The 'Favourite Contractors' tab is selected and circled in orange. It shows a list of 'My Favourite Contractors' with one item, 'Toronto Service - Demo', sorted by 'Contractor Account' and filtered by 'my favourites'.

CONTRACTOR NOTES, WARNING NOTES AND RATINGS

To leave a note on a contractor that will only be seen internally by your colleagues, go to their profile and click **EDIT**.

The screenshot shows the Contractor profile page for 'DNA Installer Company (Demo Contractor)'. At the top right, there are 'Notification Settings', 'Edit', and 'Favourite' buttons. The 'Favourite' button is highlighted with a blue border.

You can leave a contractor note or a warning note. In addition, you can rate your contractor with a Grade level of A, B, C or D. The grading levels can be determined internally.

This information will be visible on the top part of the profile page for your employees to view.

Rating

--None--

Favourite

☐

Warning

☐

Warning Notes

Note

☐

Contractor Notes

*Not all users will have the permission to add but will be able to read the warnings, notes and ratings.

CONTRACTOR PROFILE – WCB STATUS BY PROVINCE

- If the WCB/CSST status states PLEASE REVIEW or EXPIRED PLEASE REVIEW, it indicates that the contractor works in more than one province. Please go to the contractor profile and look at the provincial accreditation.
- Below the main profile section, you will find a list of all provinces and their WCB status. The check mark is now your accreditation status for that province.

Warning Notes

WCB/CSST

Please Review

Membership Status

Accreditation Status

Member

☒

Contract End Date

24/07/2019

Accreditation Expiry Date

23/11/2019

Follow Up Days

Primary Client Contact

Rating

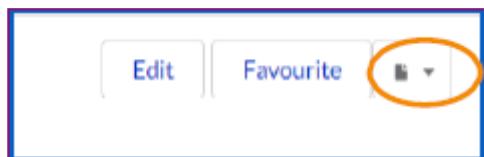
Contractor Notes

WCB/CSST INFORMATION

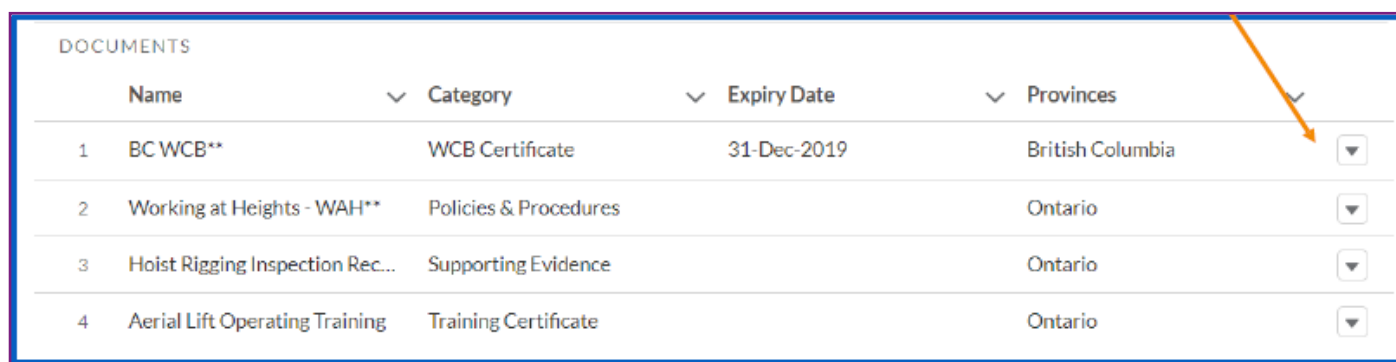
Alberta WCB/CSST Status	Current	Alberta Accreditation Status	<input checked="" type="checkbox"/>
British Columbia WCB/CSST Status	Current	British Columbia Accreditation Status	<input checked="" type="checkbox"/>
Manitoba WCB/CSST Status	No Documents	Manitoba Accreditation Status	<input type="checkbox"/>
New Brunswick WCB/CSST Status	No Documents	New Brunswick Accreditation Status	<input type="checkbox"/>
Newfoundland & Labrador WCB/CSST Status	No Documents	Newfoundland and Labrador Accreditation Status	<input type="checkbox"/>
Nova Scotia WCB/CSST Status	No Documents	Nova Scotia Accreditation Status	<input type="checkbox"/>
Ontario WCB/CSST Status	Current	Ontario Accreditation Status	<input checked="" type="checkbox"/>
Quebec WCB/CSST Status	Current	Quebec Accreditation Status	<input checked="" type="checkbox"/>

VIEW CONTRACTOR UPLOADED AND REVIEWED DOCUMENTS

To download the H&S ACCREDITATION CERTIFICATE click on the FILE button on the top right of the contractor profile. You will be able to download and save to your computer.



On the contractor profile page, you can view all documents that the contractor has uploaded. You can sort by the headers to make it easier to find specific documents. To download the file, click on the ARROW and you can download and save the file to your computer.

A screenshot of a table titled 'DOCUMENTS'. The table has five columns: 'Name', 'Category', 'Expiry Date', 'Provinces', and a download icon column. There are four rows of data. An orange arrow points from the top right of the table to the download icon in the first row.

	Name	Category	Expiry Date	Provinces	
1	BC WCB**	WCB Certificate	31-Dec-2019	British Columbia	▼
2	Working at Heights - WAH**	Policies & Procedures		Ontario	▼
3	Hoist Rigging Inspection Rec...	Supporting Evidence		Ontario	▼
4	Aerial Lift Operating Training	Training Certificate		Ontario	▼

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