

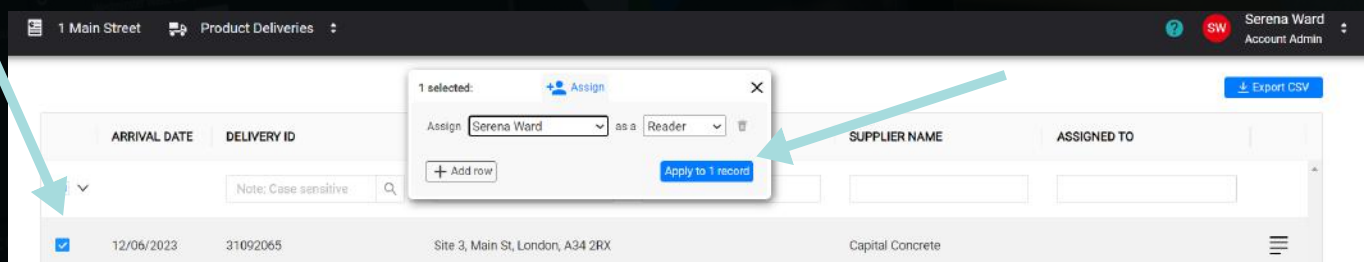
How to assign records and notifications

How to assign a record

Within the Qflow portal, you will now be able to assign an individual or groups of individuals to either a waste record or a delivery record.

This feature can help to show which records are being worked on or actioned by individuals on the project. Users can also assign records to other team members or sub-contractors, provided they have a Qflow account.

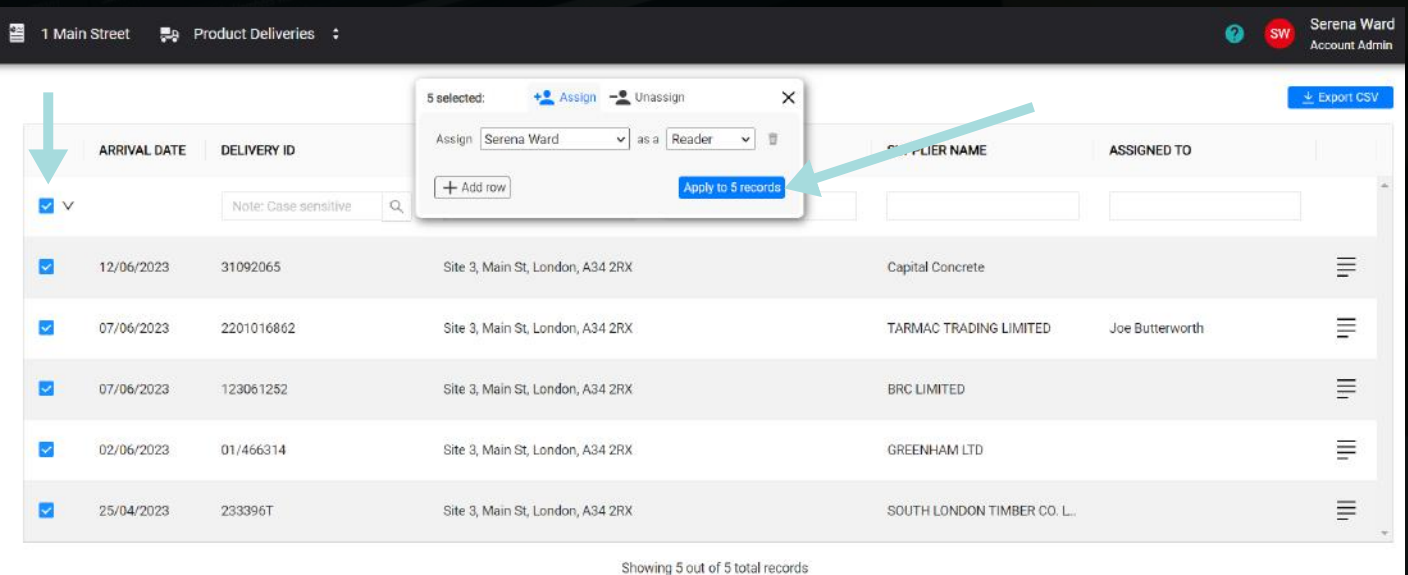
Open the records page and select the box at the left hand side of the records, you will then be able to assign this record to one or multiple users. Select the user's name and then click 'Apply'.



The screenshot shows the Qflow portal interface. At the top, there is a navigation bar with '1 Main Street' and 'Product Deliveries'. A user profile for 'Serena Ward, Account Admin' is visible in the top right. A modal window titled '1 selected:' is open, showing an 'Assign' dropdown set to 'Serena Ward' and an 'as a' dropdown set to 'Reader'. Below these are '+ Add row' and 'Apply to 1 records' buttons. The background table has columns for 'ARRIVAL DATE', 'DELIVERY ID', 'SUPPLIER NAME', and 'ASSIGNED TO'. One record is visible with a checked checkbox on the left.

ARRIVAL DATE	DELIVERY ID	SUPPLIER NAME	ASSIGNED TO
12/06/2023	31092065	Site 3, Main St, London, A34 2RX	Capital Concrete

You can select multiple records at once, if you need to assign all records from one supplier or one trade contractor to one person. Select multiple boxes on the left hand side, select the user and then click 'Apply to all records'.



The screenshot shows the Qflow portal interface with five records selected. A modal window titled '5 selected:' is open, showing an 'Assign' dropdown set to 'Serena Ward' and an 'as a' dropdown set to 'Reader'. Below these are '+ Add row' and 'Apply to 5 records' buttons. The background table has columns for 'ARRIVAL DATE', 'DELIVERY ID', 'SUPPLIER NAME', and 'ASSIGNED TO'. Five records are visible, each with a checked checkbox on the left.

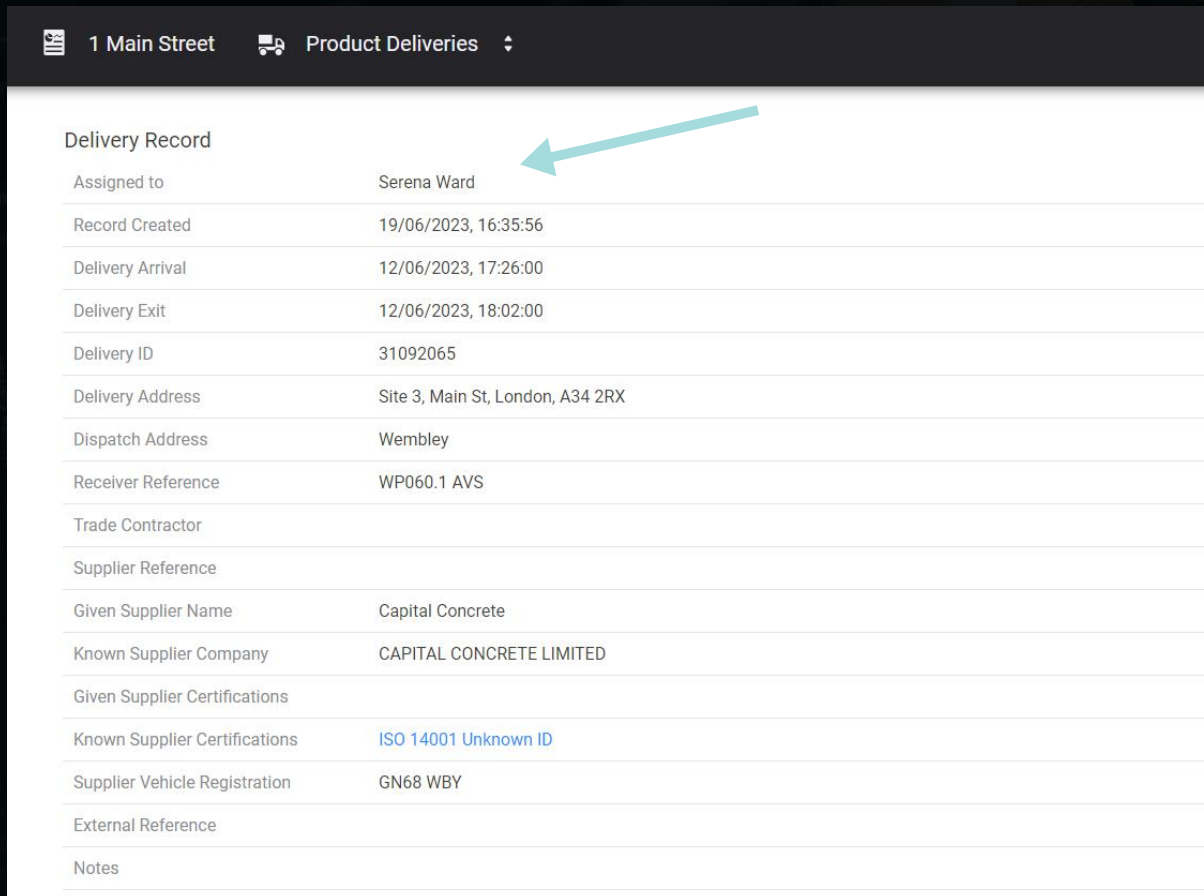
ARRIVAL DATE	DELIVERY ID	SUPPLIER NAME	ASSIGNED TO
12/06/2023	31092065	Site 3, Main St, London, A34 2RX	Capital Concrete
07/06/2023	2201016862	Site 3, Main St, London, A34 2RX	TARMAC TRADING LIMITED Joe Butterworth
07/06/2023	123061252	Site 3, Main St, London, A34 2RX	BRC LIMITED
02/06/2023	01/466314	Site 3, Main St, London, A34 2RX	GREENHAM LTD
25/04/2023	233396T	Site 3, Main St, London, A34 2RX	SOUTH LONDON TIMBER CO. L.

Showing 5 out of 5 total records

How to assign a record

Once a record has been assigned, the name will be visible on the Records page. Users can also be assigned as a Reader or a Contributor. Readers will not be able to edit the record, contributors have full editing access.

If you would like the user to be able to edit or add information to a record, ensure they are added as a contributor.

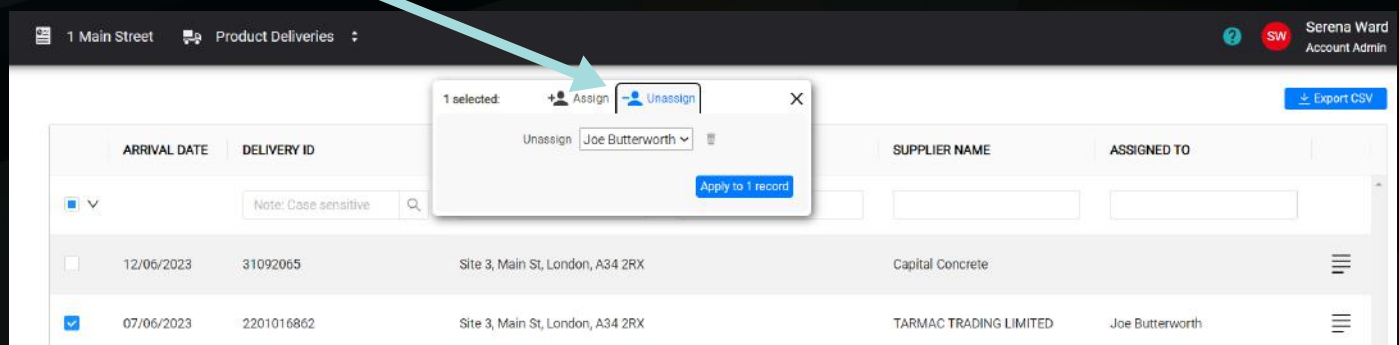


1 Main Street Product Deliveries

Delivery Record

Assigned to	Serena Ward
Record Created	19/06/2023, 16:35:56
Delivery Arrival	12/06/2023, 17:26:00
Delivery Exit	12/06/2023, 18:02:00
Delivery ID	31092065
Delivery Address	Site 3, Main St, London, A34 2RX
Dispatch Address	Wembley
Receiver Reference	WP060.1 AVS
Trade Contractor	
Supplier Reference	
Given Supplier Name	Capital Concrete
Known Supplier Company	CAPITAL CONCRETE LIMITED
Given Supplier Certifications	
Known Supplier Certifications	ISO 14001 Unknown ID
Supplier Vehicle Registration	GN68 WBY
External Reference	
Notes	

All records can also be unassigned, simply click the left hand box and select 'Unassign'.



1 Main Street Product Deliveries Serena Ward Account Admin

1 selected: Assign Unassign

Unassign Joe Butterworth

Apply to 1 record

ARRIVAL DATE	DELIVERY ID	SUPPLIER NAME	ASSIGNED TO
<input type="checkbox"/>	12/06/2023 31092065	Site 3, Main St, London, A34 2RX Capital Concrete	
<input checked="" type="checkbox"/>	07/06/2023 2201016862	Site 3, Main St, London, A34 2RX TARMAC TRADING LIMITED	Joe Butterworth

How to assign an event

Notifications relating to non-compliant waste transfer notes or products missing responsible sourcing certificates can be assigned to an individual user or a group of users.

This enables users to assign a notification or group of notifications to specific team members, provided they have a Qflow account. This can help to ensure that an event is closed out by the right team member or sub-contractor.

Open the 'Events' page within the Qflow portal and select the box on the right hand side to assign a user. If you'd like a user to edit a notification, ensure they are added as a 'Contributor'.

The screenshot shows the 'Events' page in the Qflow portal. A modal window is open for assigning a user. The modal has a dropdown for 'Assign' set to 'Serena Ward' and a dropdown for 'as a' set to 'Contributor'. There is an 'Apply to 1 event' button. A table below shows one event selected with a blue checkmark in the left-hand column.

DATE	TYPE	STATUS		SUPPLIER	ASSIGNED TO	LINKS
19/06/23 16:55	Issue	Open	<input checked="" type="checkbox"/>	CUT & BENT B500 C 16 MM : No CARES Sustainable Constructional Steel certification (SCS) found	BRC LIMITED	123061252

Multiple events can be selected at once. Simply select all the notifications using the boxes on the left hand side and then select 'Assign', pick the user and click 'Apply'. Click 'Add Row' to assign to more than one user.

The screenshot shows the 'Events' page with four events selected, each with a blue checkmark in the left-hand column. The modal window is open, showing the 'Assign' dropdown set to 'Serena Ward' and the 'as a' dropdown set to 'Reader'. The 'Apply to 4 events' button is visible. The table below shows the four selected events.

DATE	TYPE	STATUS		REACTOR	SUPPLIER	ASSIGNED TO	LINKS
19/06/23 16:55	Issue	Open	<input checked="" type="checkbox"/>		BRC LIMITED		123061252
26/05/22 12:16	Issue	Open	<input checked="" type="checkbox"/>		CMF Limited		106372
26/05/22 12:16	Issue	Open	<input checked="" type="checkbox"/>		CMF Limited		106372
26/05/22 12:16	Issue	Open	<input checked="" type="checkbox"/>		CMF Limited		106372



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If you have any questions, please don't hesitate to reach out to your Customer Success Manager, or at support@qualisflow.com