

**Contractor Portal**

**Guide for Contractors**

A blue and white symbol with tools

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A login screen with a picture of a city

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March 2025

Version 5.0

Table of Changes

|  |  |  |  |
| --- | --- | --- | --- |
| Date of Change | Change made | Made by | Version history |
| 29/07/2024 | **Changes made**  Added details to completed and closed tickets - Page 7  Added more detail to Rejects – Pages 8 & 15  Changes to booking an appointment – renamed appointing tickets – additional options for communal and emergency repairs – Page 12  Follow on Contractor process - Page 15  Added explanation of SOR codes ad quantities to completing a job with no additional work - Page 18  Added more details and screen shots to completing a job with additional work SQW - Page 23 | Debbie Evans | V4 |
| 03/01/2025 | Page 19 Made it clearer that contractors need to check the unit to establish if it is price based or not | Debbie Evans | V5 |
| 19/02/2025 | Made changes to the financial section to make things clearer | Debbie Evans | V5 |
| 19/02/2025 | Added a printing ticket section at page 14 | Debbie Evans | V5 |
| 24/02/2025 | Added new pages to include Advance ticket Filter and adding and removing columns to the ticket review | Debie Evans | V5 |
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**Link and log in details**

**How to log into the Contractor Portal**

To open the SNG contractor portal – click on the link below – we recommend that you save the link as a favourite.

<https://contractorlive.sovereign.rocc.cloud/>

This will take you to the log in screen where you can enter your username and password.

You will be prompted to change your password the first time you log in.

A login screen with a picture of a city

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**Password Resets and Issues**

If you forget your username or password or have problems logging on press the link named Need Help?

A screenshot of a login form

Description automatically generated

Then choose the appropriate option.

If you forget your **password** you will need to enter your username on the next screen and an email will be sent for you to reset it.

A screenshot of a login form

Description automatically generated

If you have other problems logging in you can use this option to send SNG a message and someone will get back to you. alternatively, please email us contractorportal@sovereign.org.uk

If you forget your **username** you need to enter your email address on the next screen and your username will be emailed to you.

**The Homepage**

When you log in your Homepage will be displayed.

The home page will show:

* **Contractor portal** - pre-defined searches for specific criteria
* **Announcements** -SNG can send you messages here.
* **Tickets** -Shows the tickets you have allocated to you and the status of those tickets.
* **Accepted Progress** – This shows the status of tickets which you have accepted.
* **Overdue tickets** – This shows tickets you have **accepted** that are overdue
* **Total WIP** – The number of **accepted jobs** that are in progress
* **New Notes** – This will display tickets to which SNG have added a new note.
* **Two to attend** - Any two to attend (VIP) tickets will appear here
* **Invoices** – History of invoices submitted

Clicking on the headings will take you through to the relevant section.

A screenshot of a computer

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**My Profile**

A screenshot of a computer

Description automatically generatedEach organisation will have a profile in the portal. This can be accessed by logging in, clicking on the person in the top right of the screen and selecting **My Profile**

Here you can find a number of options.

**Add a Photo –** Allows you to add an organisational photo or logo

**Change your default home locations on maps** – This allows you to set your working location, such as your office, if you wish.

**Change your availability** – This allows you to put an ‘out of office’ on so work cannot be assigned directly to you. If you use this option, any tickets sent to your organisation will automatically reject so please use with caution.

**Change your alert settings** – This allows you to receive email notifications when you receive work. It is recommended you keep these options set to receive email notifications, so you are notified when you receive a job from SNG. Your organisation is set to receive email notifications automatically but if you want to change this, please contact us.

**Account Settings-** This allows you to change your passwords or recovery address. It also provides a summary, of your account and you can view the account activity.

**Tickets and Visits**

To access tickets that have been sent to your organisation press on the **Tickets** link at the top.

A list of tickets with text

Description automatically generated

**All Tickets**: This shows you all the tickets you have received from SNG including completed, closed, and cancelled tickets.

**New Tickets**: When a new job is issued it will show here.

**Follow On Tickets**: 2nd no access tickets and tickets SNG issued back to you which require follow on work will appear here.

**Accepted Tickets**: Tickets you have accepted appear here.

**Cancelled Tickets**: Tickets cancelled by SNG appear here. You will need to acknowledge the cancellation.

**Completed Tickets**: Tickets that are completed appear here and remain here for 30 days

**Closed Tickets**: Tickets which are completed and older than 30 days and tickets you have rejected appear here. They remain here for 30 days and then they will be archived. If you need to access a ticket older than 60 days SNG can access this for you

Accepted tickets will be broken down further into the categories on the next page.

A screenshot of a phone

Description automatically generated

When SNG send work to you in the portal it will be delivered as a ticket. A ticket contains an order number and a visit reference. You will receive orders with a C number, but it will also include an additional number after a slash. This indicates the visit number see diagram below.

This is the job number and it will remain the same regardless of how many visits are needed.

**C123456/1 / 1**

This is the visit number. All new jobs will display **1** It will update to **/ 2**, **/ 3** (and so on) if a new visit is required, for example 2nd no access request.

**Ticket Preview**

To see the details of a job simply select a job in the portal and you will see the details of it in the **Preview** window on the righthand side.

A screenshot of a phone

Description automatically generated

**Accept**: This accepts the job and moves it to your Accepted section in Tickets

**Reject**: This rejects the work. If you reject an order, you must select a rejection reason from the drop down to let SNG know why. Please also add notes for context. Rejected tickets will route to your closed ticket section.

Please call the relevant locality number if you are rejecting an emergency.

**Job /Ticket**: The job number and the visit number, as discussed above

**Status**: This shows the status of the ticket. Clicking on this will also show you the audit trail of the ticket.

**Priority**: This will show you the job priority, which dictates the due date. The priority will vary depending on the type of work.

**Earliest start**: This is the date the ticket was raised by SNG.

**Due date**: This is the date SNG expect the work to be completed.

**!** The exclamation mark shows if there are any warnings, such as asbestos or warnings about the customer. If there are no warnings, then it will display “**No recorded cautions exist”.**

**Contact name**: The customer’s name will appear here (unless it is a communal area or Empty Home)

**Telephone**: The telephone number of the customer will appear here if relevant

**Location**  Where the work is to be carried out Such as the customers home

.

.

**Description** This is a description of the work that SNG want you to carry out

**Notes**: Notes can be viewed and added in this section. Both SNG and your organisation can add and see these notes.

**Documents**: This will take you to a section displaying any documents that have been uploaded. Both your organisation and SNG can upload and view photos and documents.

**View details**: This takes you to a more detailed version of the ticket and provides a description of the works required including the relevant SORs (or costs), purchase order number etc.

**\* Important note about asbestos**: Most of our properties with asbestos have a caution attached to them, but this does not mean properties that do not have this caution are asbestos free. Please follow relevant asbestos guidelines if you suspect asbestos but there is no warning. If in doubt, contact us first.

**Action Icon Buttons**

You will see icons as you work through the portal these have the following meanings:

|  |  |
| --- | --- |
| **Icon** | Meaning |
| VIP | When lit, indicates job ticket has VIP cautions |
|  | When lit, indicates an appointment has been booked. Click on icon to change booking. |
|  | When lit, indicates ticket cautions exist. Click on icon to view cautions. |
|  | Ticket details can be viewed by clicking on icon. |
|  | This allows you to print the ticket |

**Adding notes to a ticket**

To add a note to a ticket simply click on the **Notes** section at the bottom of the job preview window.

A screenshot of a computer

Description automatically generated

You can then simply press **Add Note** at the top, type in a note and press **Save**.

A computer screen with a mouse cursor

Description automatically generated

Any notes that SNG have left will also appear here. (See below highlighted yellow)

A screenshot of a computer

Description automatically generated

Both SNG and your organisation can see these notes.

When you enter a note on the portal it **does not** alert SNG, so please contact SNG for anything requiring a response.

**Adding photos and documents to a ticket**

Once a ticket is accepted you can view and add documents to it. To do this press on the **Documents** link in the job preview window.

A screenshot of a computer

Description automatically generated

Any documents SNG have uploaded will be visible here. For example, SNG may have attached an asbestos report or photos of the required repair.

You can add **General Documents/Images** at any time up to completion. These are things like photos of repairs, PDFs, or anything you think is relevant to the job. Simply press on the **Add Document** link at the bottom of the page and upload the required document. Please also add any relevant notes.

A blue and white rectangle with a white stripe

Description automatically generated

If you need to add a certificate, then press on the **Add /Remove Sections** link and choose the appropriate certificate type (please note the labels on the image below may not be exactly what you will see in the system).

A blue and white rectangle with black text

Description automatically generated

Some jobs that contain certain SORs will require a certificate to be uploaded before the job is completed, such as an electrical inspection or a gas compliance check. If you try to complete a job that requires a certificate it will not allow you to complete it without uploading the certificate.

**Accepting a ticket**

To accept a job simply click on the ticket and press the **Accept** button.

A blue box with white text

Description automatically generated

The below pop-up box will appear after you accepted, and you will be asked for a reference number. You can leave this section blank or fill it in with your own reference number, such as a job number you use on your own systems.

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Description automatically generated

Press ok. The ticket has now been accepted

Your reference will then display on the ticket, beneath the Job/Ticket number

A screenshot of a computer screen

Description automatically generated

**NOTE** - Once **accepted** the ticket will move to the accepted section and the next ticket in the list will then be displayed in the preview on the right-hand side and it is easy to take the next action on the wrong ticket

We recommend you always copy and paste the job number then you can make sure you are taking action on the correct ticket.

**Rejecting a ticket**

To reject a ticket, select **Reject,** chose the appropriate reason from the drop down and add notes for context, the job will be returned to SNG and will appear in your Closed Tickets section.

A screenshot of a computer

Description automatically generated

**If you reject an emergency ticket, please call the relevant locality number to advise the ticket has been rejected.**

**Appointing Tickets**

Once you have accepted the ticket you will need to appoint it.

You will then either need to book an appointment with the customer or if it is a communal or emergency job, you can select the appropriate reason

. To find the ticket you have just accepted, choose **Tickets** **>** **Accepted Tickets** and select from there. Alternatively click on **All Tickets** and search for the job using the job number. It is recommended you copy and paste the job number to make the search easier.

**To confirm you have made an appointment with the customer**

Select **Yes**

A blue screen with white text

Description automatically generated

Select the date and time of the appointment.

*The times mirror SNG’s internal appointment slots*.

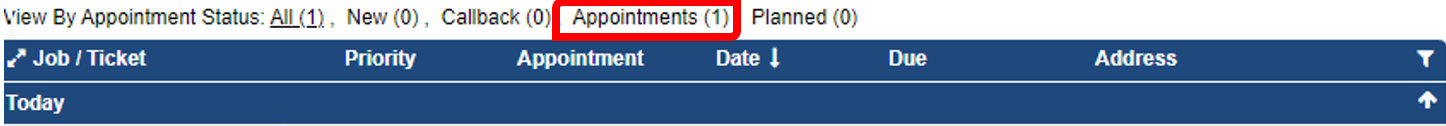
A screenshot of a computer

Description automatically generated

The appointment will be shown in the portal and SNG will also be able to see it in their system.

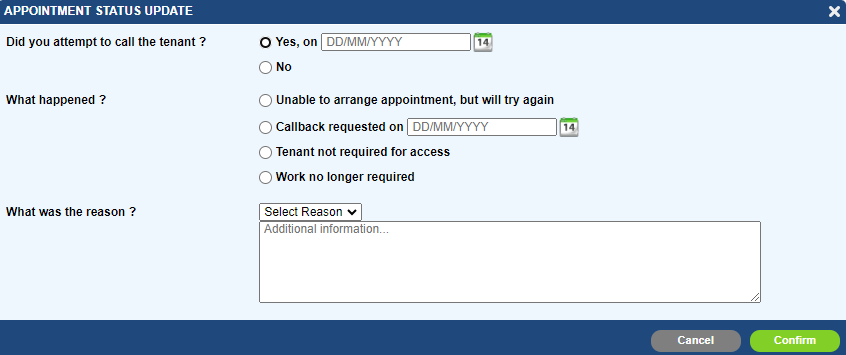
The job will remain in **Accepted Jobs** until the next stage.

The ticket can also be located in the appointments section



If you have not booked an appointment chose **No**

you will then be asked to provide a reason why the appointment has not been booked



If you select work is no longer required, this will take the ticket out of the portal and transfer the ticket back to SNG

**When an appointment is not required**

* If the job is communal and there is no specified customer to contact on the ticket
* If you don’t wish to specify an appointment slot with a customer for an emergency

*(When an emergency is sent to you, SNG have already advised the Customer to stay home for 24 hours)*

Select Tenant not required for access (*we are hoping to change this to appointment not required)*

Then select reason (outside work will soon be changed to communal repair appointment not required)

A screenshot of a computer

Description automatically generated

**Changing an appointment**

If you need to change an appointment, choose the relevant ticket and click **change** on the preview panel next to the appointment or click the  icon at the side of the job ticket number

A screenshot of a computer

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This will bring up the diary booking window and allow you to amend the appointment you will also need to select a reason for moving the appointment.

**Printing a ticket**

Select the ticket you wish to print and click on view details. The ticket has to be accepted before you can print it

A screenshot of a computer

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Press the ticket button this will bring up the ticket press the print button to print

A screenshot of a computer

AI-generated content may be incorrect.

**If you did not attend site**

If you did not attend site, choose **NO**, you will then be given the option to reject the ticket

Choose a reason from the drop down list and please always add comments as to why the ticket was rejected as per the example below

A screenshot of a computer

Description automatically generated

This ticket will then route back to SNG who will review and take appropriate action.

**No Access**

If when you attend to carry out a repair at an SNG property, the customer is not home you will need to follow the No Access Process.

Where possible please put a card through the door of the property with your contact details on so the customer can call back to re-book the appointment.

You will then need to update the no access event in the portal.

Enter the time and date you arrived at the property then choose the No Access Card Left option from the drop- down menu.

A screenshot of a computer

Description automatically generated

If this is the first no access event, the ticket will leave the portal , route to SNG then turn around and re-enter the portal as a follow on, it will keep the same job number but the visit number will show as 2

You will need to accept the job again and then attempt to book another appointment with the customer.

If this is the second no access event, when you choose the no access card left option the ticket will route back to SNG and become the responsibility of SNG to manage through the no access process.

If you have an agreement to charge SNG for no access, please write a note on the ticket to advice of the charges so we can leave the PO open to allow us to pay your invoice

**Carrying out the Repair**

After you have attended the job, you need to let SNG know in the portal.

Find the ticket in the portal and select it so it displays on the preview in the right panel.

You then need to update the ticket with what works were done and if the job is completed.

**Unable to complete the Repair?**

**Follow on Contractor**

If you are unable to complete the repair update the job in the portal and select the reason why

**If you attended site and DID NOT complete the work and need to return but DO NOT require approval or guidance from SNG this is a Contractor Follow on**

**Follow the below steps**

**When did you arrive at the location**: This is the date and time the repair was started.

**Did you fully complete the work?** If you have not completed the work choose **NO**

**What was the outcome?** Select the appropriate reason from the drop down menu. In this instance it will be **follow on contractor**

Where possible please book a follow- on appointment whilst you are on site

**Comments**: Please clearly detail here why you were unable to complete works at the first visit and why you need to return.

Advise if you have booked an appointment from site – if you have, please include the appointment details in your note

If you were unable to book another appointment from site, please let us know what prevented you from doing so and give us an estimate of when you expect to return.

**Include operative details?** This field is optional

NOTE – Only use the Follow- On Contractor option when you fully intend to return to complete the work – **Do not** need assistance from SNG to do so and there are **no significant cost differences**

A screenshot of a computer screen

Description automatically generated

Selecting Follow on Contractor will create a second ticket back allowing you to book in your next appointment

It will have the same order number, but the ticket number will be 2

You will need to accept the follow on and then follow the steps to book an appointment as per section 3.3

**Follow on SNG Assistance needed**

**If you attended site and DID NOT complete the work and NEED action from SNG.**

You will be presented with the same screen as with the contractor follow on

**What was the outcome?** Select the reason you did not complete from the drop down menu.

In this instance it will be either **Follow on SNG Action needed** or **Follow on SNG Asbestos alert**

**Comments**: Please clearly explain why you were unable to complete works and what assistance you need from SNG

A screenshot of a computer

Description automatically generated

Selecting Follow on SNG Action needed or SNG Asbestos alert will route the ticket back to SNG.

SNG will then review your notes and make a decision on next steps.

In some instances, SNG will send the ticket back to you as a follow with a note explaining what actions you should take.

On some occasions SNG may need to contact you for further info or to discuss options

If the ticket is sent back to the portal, it will have the same order number, but the ticket number will be 2

You will need to accept the follow on and then follow the steps to book an appointment as per section **3.3**

**Completing a job with no additional work.**

A blue box with red text

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**Did you visit the location?** Select **Yes**, then enter the date and time you attended.

**When did you arrive at the location?** This is the date and time the repair was started.

**Did you fully complete the work?** If you have completed the work choose **YES** and enter the date and time the repair was completed.

**What was the outcome?** This defaults to Physically Completed if you completed the work.

**Comments**: Please put a description of what works were completed here (please do not just write job complete)

**Include operative details?** This field is optional

A screenshot of a computer

Description automatically generated

Press Continue and you will be presented with one of the screens below Which shows you a summary of the work you have been requested to carry out.

Some orders will show the schedule as SQW (Specially Quoted Works ) these PO’s are monetary value PO’s and the unit in these PO’s will always be **PRICE**  if the unit is price this is a monetary value

below example shows a PO for £350

A screenshot of a computer

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Some orders will show the Schedule as a number this may or may not be from the NAT FED price-book

These Schedules will not be price based always check the **unit** column if it says anything other than **PRICE** you then you know that this is not a monetary based PO

All schedules sent across will have a cost linked to them (currently this is not visible in the portal)

In the example below the SOR 043001 has a cost of £77 and we have requested that you complete 1 of these ( as shown in the quantity section )

In the completed field you will populate the number of these SOR’s you ACTUALLY completed so whatever number you enter in the completed field will be multiplied by the cost of the code

So if you put in 1 in the completed box the system will say 1 X £77= £77

If you enter 5 then the system will say 5 x £77 = £385

A screenshot of a computer

Description automatically generated

**If you are a contractor who does NOT use NAT FED rates you will need to zero the code out and then add an SQW with the amount you are charging**

A screenshot of a computer

Description automatically generated

In the screen that pops up enter SQW in the search bar and then hit the magnifying glass this will bring up the SQW option

A screenshot of a computer

Description automatically generated

Then click Add and you will see the number by the hammer increases from 0 to 1 then click basket

You can then add the amount you intend to charge in the completed box

A blue and white rectangular object with a white border

Description automatically generated

Once you are happy that the works completed match the schedules on the ticket, click continue.

Add any photo or document if required (see section 2.6).

press continue.

A blue and white box with white text

Description automatically generated

The final screen comes up asking you to confirm. Hitting confirm will complete the job both in the portal

and in SNG’s system.

A blue box with white text

Description automatically generated

**Completing a job WITH additional works using SOR codes**

**Link to video demonstration**: **coming soon**

Please ensure you have permission to complete additional works prior to carrying them out. Where possible call from site to get immediate agreement.

If you completed the SOR’s SNG sent over but also completed additional works whilst at the property Press **Yes** next to **Did you complete any additional schedules?**

A screenshot of a computer screen

Description automatically generated

Add the SOR’s you completed. You can manually search or simply type in the SOR to find it.

When you have found the SOR(s) you require press on the **Add**

A screenshot of a computer

Description automatically generated

You will see that the **Items** at the top will increase when you add an SOR.

A screenshot of a computer

Description automatically generated

**Note**: There is no confirmation message to say the SOR has been added so please do not click continually or you will end up adding multiple SOR’s

Once you have added the relevant SOR(s) press the **Basket** button to review them. You will notice the quantity will be 0. This is because it was not originally requested on the job but as long as you have permission to complete this work SNG will approve it.

If you accidently added too many SOR’s then just click remove line to remove the SOR

A computer screen shot of a computer screen

Description automatically generated

Enter the quantity of SORs you completed. E.g. if you completed 1 leave as 1, but if you have completed 2 change it to 2.

Press **Confirm** You will be taken back to the first screen and you will see your additional SOR’s have now been added. Check everything is correct then press **Continue**.

A screenshot of a computer

Description automatically generated

Pressing **Continue** again will allow you to upload documents see (section 2.6) and then the final stage will complete this job.

Although the job is completed at this stage SNG will still need to review the additional works done. If there are any issues then SNG will get in touch with you, but if there are no issues you are able to invoice SNG based on the SOR’s you selected.

**Completing a job WITH additional works on an SQW**

If you have done additional works on an SQW PO

A screenshot of a computer

Description automatically generated

Choose yes to the question did you complete additional schedules

Search for the SQW SOR click add

The item count by the basket button has now increased from zero to 1

A screenshot of a computer

Description automatically generated

Add the additional amount you wish to charge and hit confirm

A blue and white rectangular object with a white border

Description automatically generated

A screenshot of a computer

Description automatically generated

Then click continue and confirm as per previous section

**Financials**

**SORs and costs**

There are no prices displayed against the NATFED Schedules in the portal so please refer to your contracted price book for any costs associated with these

If the work you are carrying out is based on cost and not NAT FED then the **Schedule** used will show as SQW and the UNIT will be the PRICE. For example, if the cost of the works is £1,398.99 then the quantity will show as 1398.99.

You can see the schedules used on a job at any time by selecting **View Details** in the job preview window.

**Purchase Orders**

The purchase order number is available when you click on **View Details** in the job preview window, under the **Job Information** section.

If you need a copy of the job with the purchase order number on for your own systems then press on the **Print** icon on the **View Details** page. You can then print this either physically or as a PDF.

**Invoicing**

It is important that the Schedules (or costs) on your invoices match what you have claimed in the portal. If you have made an error when completing the job in the portal please contact us to rectify this before invoicing.

Please do not upload any invoices to the portal. Please continue to issue invoices as you currently do. If you have any issues with payment, please call 01635 277911

**Advanced Filter Query**



Click the advanced query filter and the below text box appears

A screenshot of a computer

AI-generated content may be incorrect.

You can search on any of the fields that appear in the drop down list the example below shows using the advanced filter to locate a specific Purchase Order number

A screenshot of a computer

AI-generated content may be incorrect.

The search will then bring up the order that contains that Purchase Order number

A screenshot of a computer

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**Adding and removing columns to the ticket view**

You can add remove and move columns in the portal to customise your view

Click on all tickets

Click on the filter button on the top right

A screenshot of a calendar

AI-generated content may be incorrect.

This will bring up a list of columns available to add or move

A screenshot of a computer

AI-generated content may be incorrect.

Click on add column and select the column you wish to add.

The example below shows that the Purchase Order column has been selected

A screenshot of a computer

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 Clicking on the 3 lines will give you the following options

A screenshot of a phone

AI-generated content may be incorrect.

The arrows can be used to move the position of the selected option up or down the list. You can also drag to the position you want the column to appear. Below example shows the Purchase Order number has been unhidden and moved to the top of the list rather than at the bottom of the list

A screenshot of a document

AI-generated content may be incorrect.

Click the search button and your change will be reflected on the ticket view

The purchase order column has now been added to the ticket view

A screenshot of a calendar

AI-generated content may be incorrect.