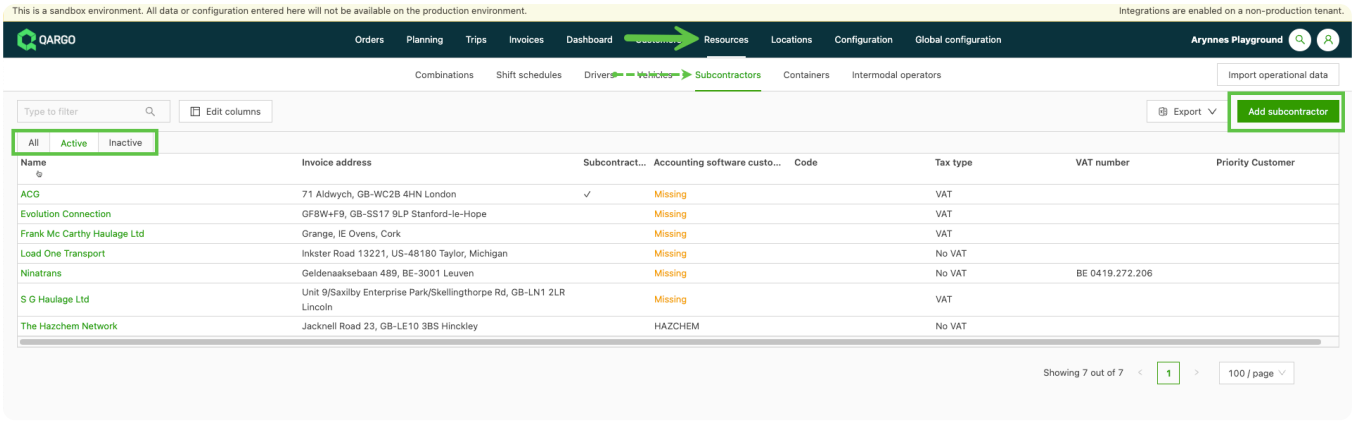
Add a subcontractor

Manage subcontractors with ease. View active/inactive lists, show approval status as a column, customise columns, add filters, create profiles and track statuses.

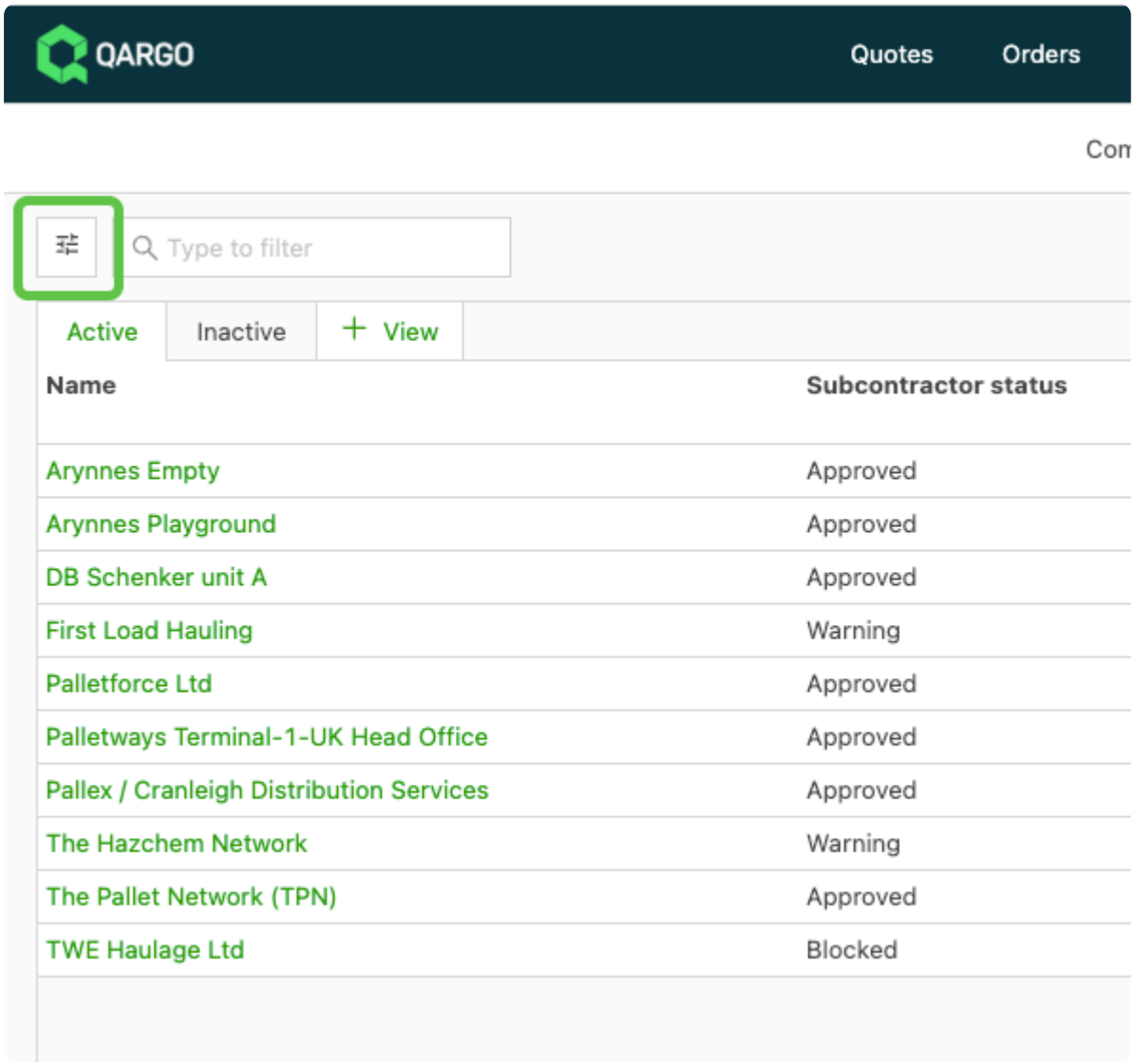
Updated 24 September 2026

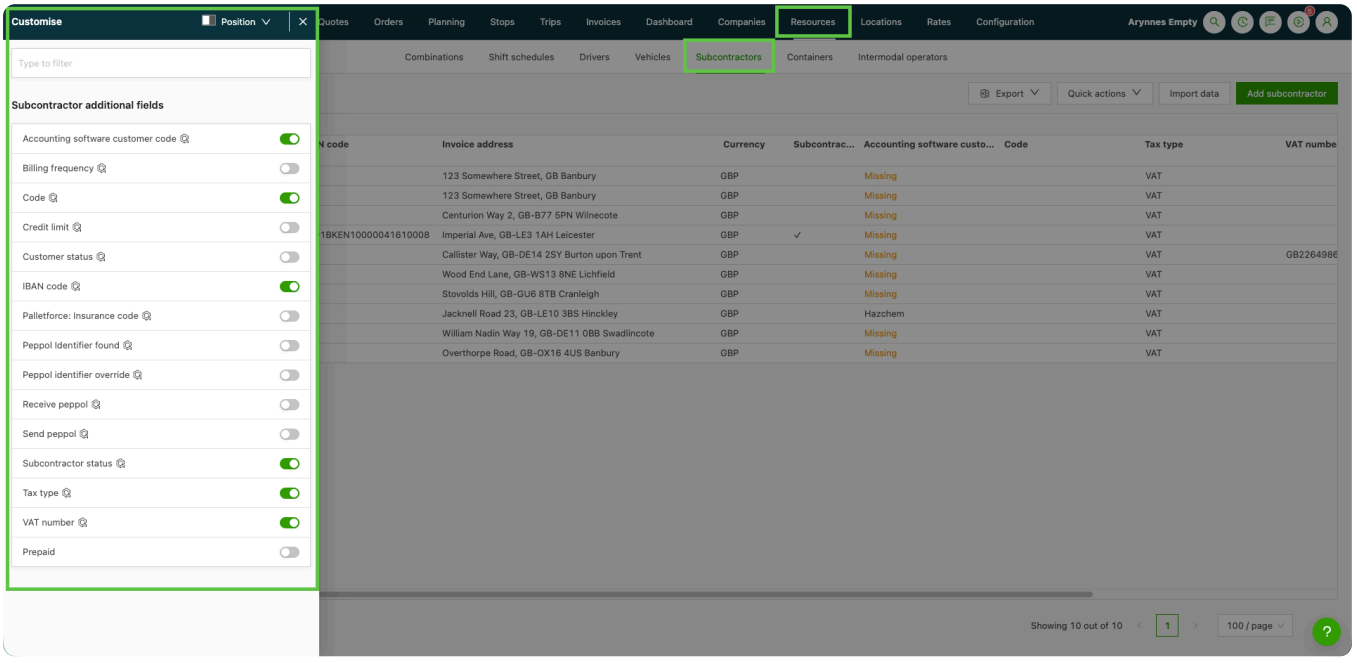
- **NAVIGATE** to **RESOURCES** >**'*Subcontractors*'** to open the Subcontractor list. The default view will show a list of Active subcontractors, the tabs will also allow easy navigation to show ***Inactive or ALL*** subcontractors.



Customise the view / data that is visible on the subcontractor list.

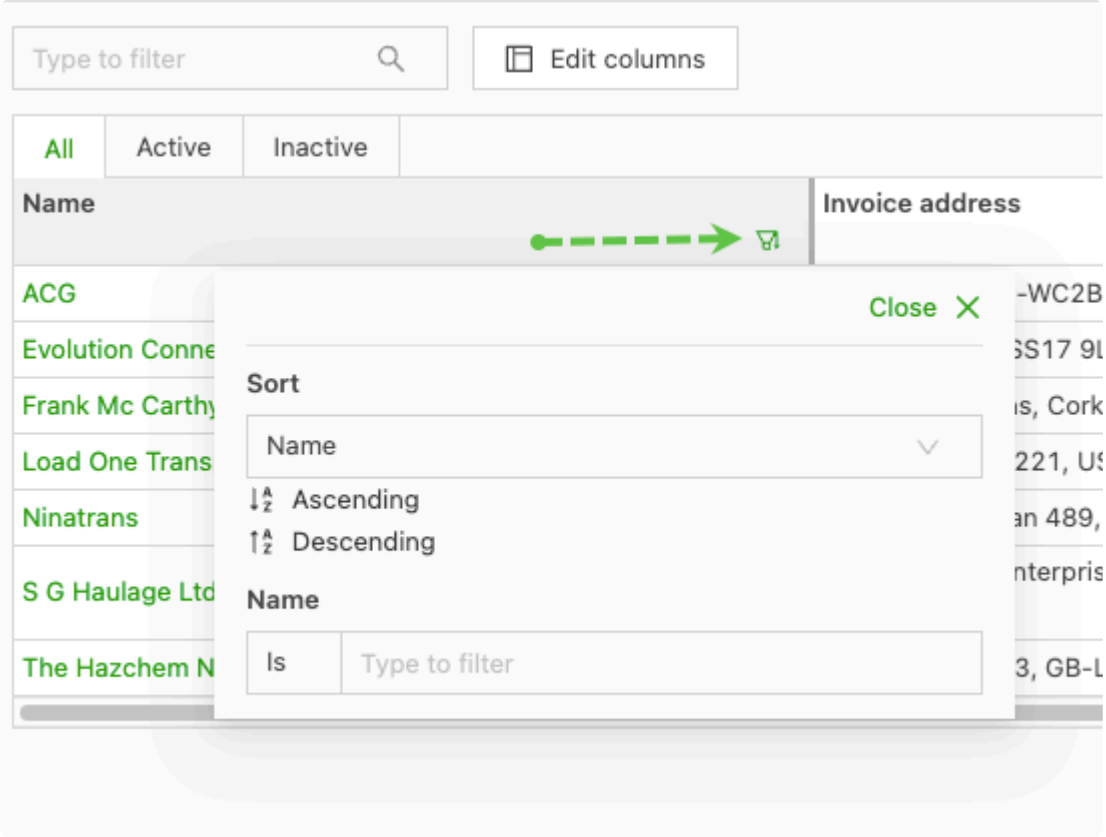
- **CLICK** the **'Customise'** button, this will expose a side menu.
  - Additional columns can be toggled on/off to add improved visibility of key information.





🧰 If you cannot find an additional field in the **Customise** section, check the Additional Fields configuration tab to verify it's active.

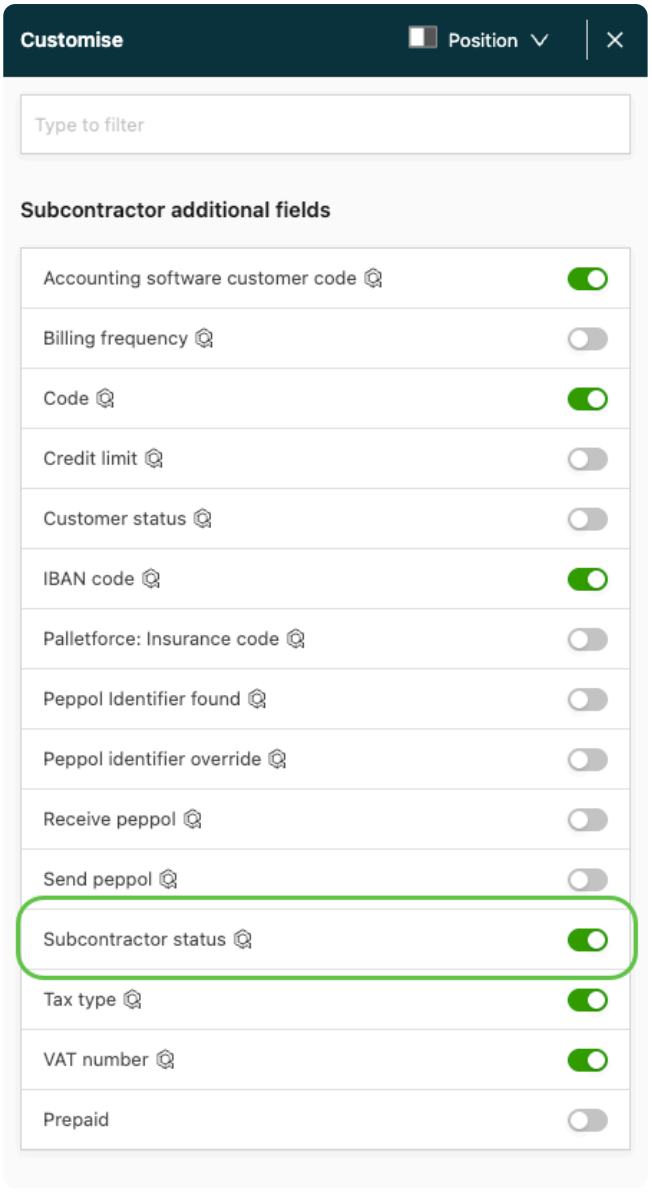
- **MODIFY** the view by using filter options in the column headers.
    - Place the cursor into the column header, the filter icon will show in the bottom right corner.
    - **CLICK** the icon to open the menu options for additional filters.

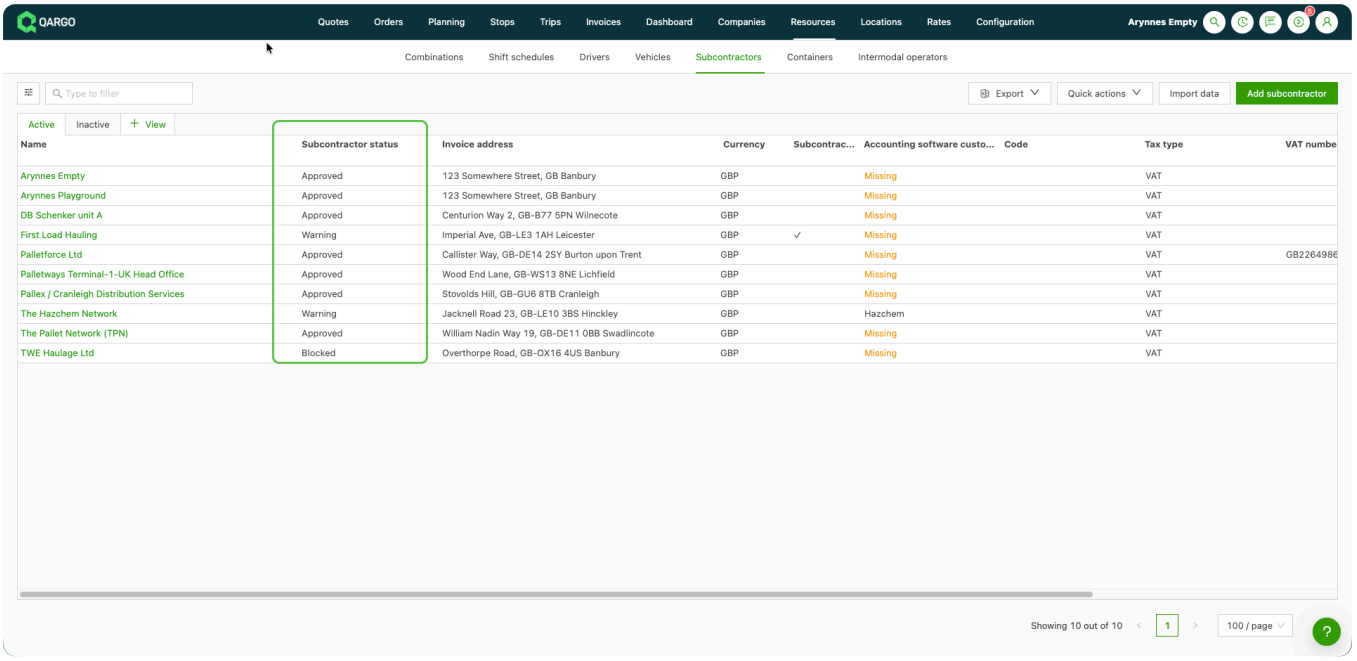


Show subcontractor status on the Subcontractor list:

The ***Subcontractor status*** column shows the approval status of every subcontractor directly on the list. This makes it quick to see which subcontractors are ready for use on trips, without opening each record one by one.

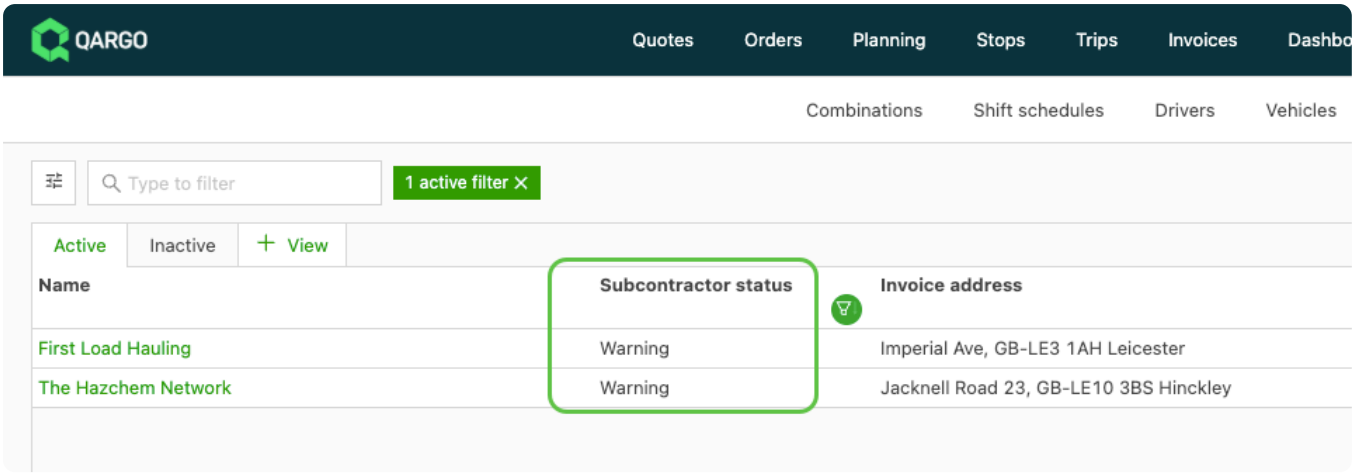
1. **OPEN** the Subcontractor list.
2. **CLICK** *'Customise'* to open the side menu.
3. **TOGGLE ON** *Subcontractor status* (listed under *Subcontractor additional fields*).
4. **CLOSE** the side menu. The status of each subcontractor now shows in its own column.





The column works like any other column on the list:

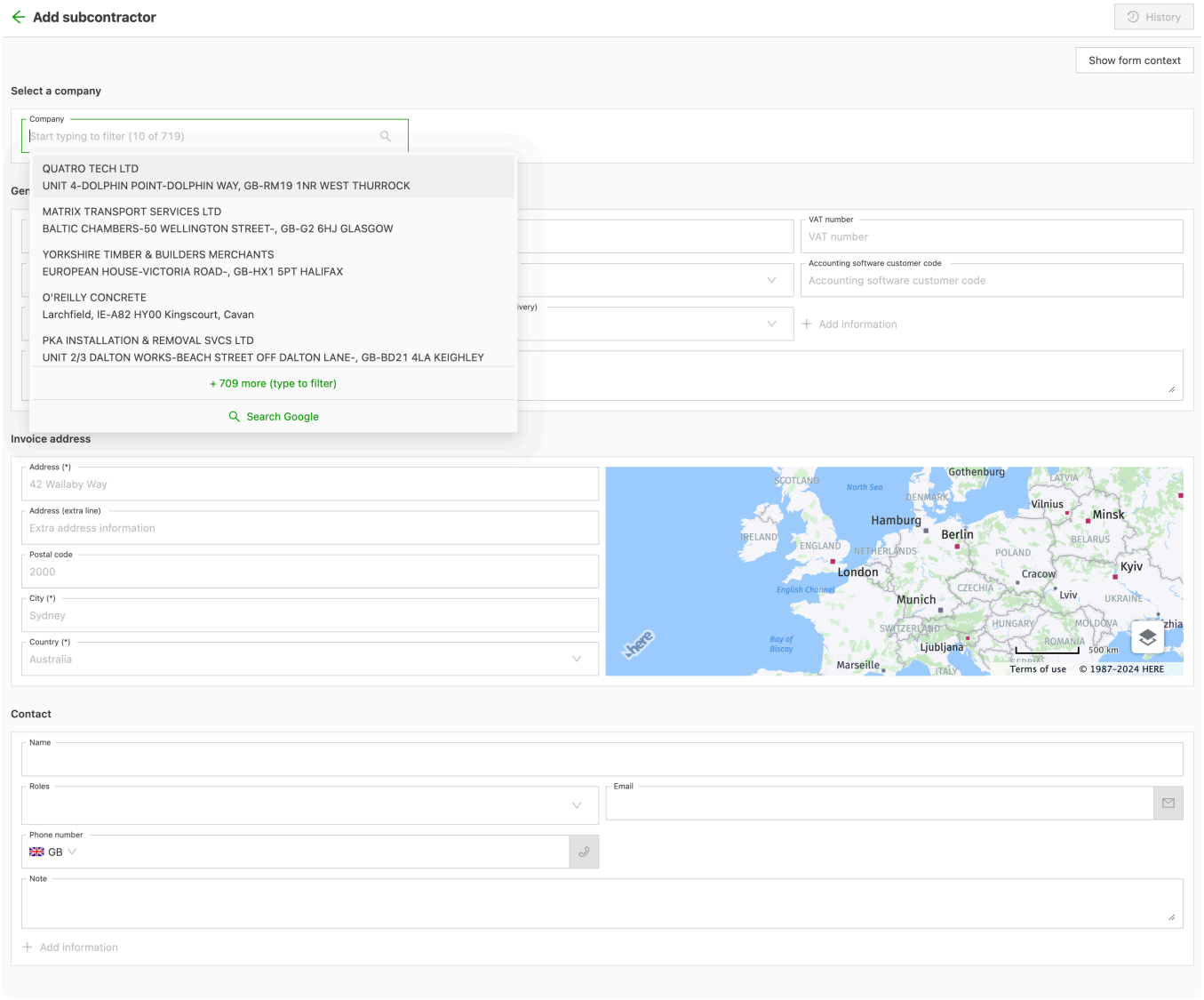
- **FILTER** by placing the cursor in the *Subcontractor status* column header
  - **CLICK** the filter icon
  - **SELECT** one or more statuses, for example *Approved*, to show only those subcontractors. The filter matches the exact status, so filtering on *Approved* does not also return *Not approved* subcontractors.
- **Sort:** sort the column ascending or descending to group subcontractors by status.
- **Save the view:** save the view to keep the column, filter and sort for next time.



📚 The column setting is personal. Switching the column on or off only changes the list for the user making the change, and the choice is remembered.

Add a new Subcontractor:

- Click on ***'Add subcontractor'***.
- If that company is already a customer, you can choose in the dropdown that company. If not, you can create the subcontractor by searching for the company.



- Once the subcontractor name is selected, it will autopopulate fields in General Info.
- Validate the pre-filled fields, and complete any other required fields.
- Complete the Invoice Address information.
- Verify if the subcontractor's activation status is set to "Active" under Generic Resources to ensure visibility during job resourcing.

Add a contact

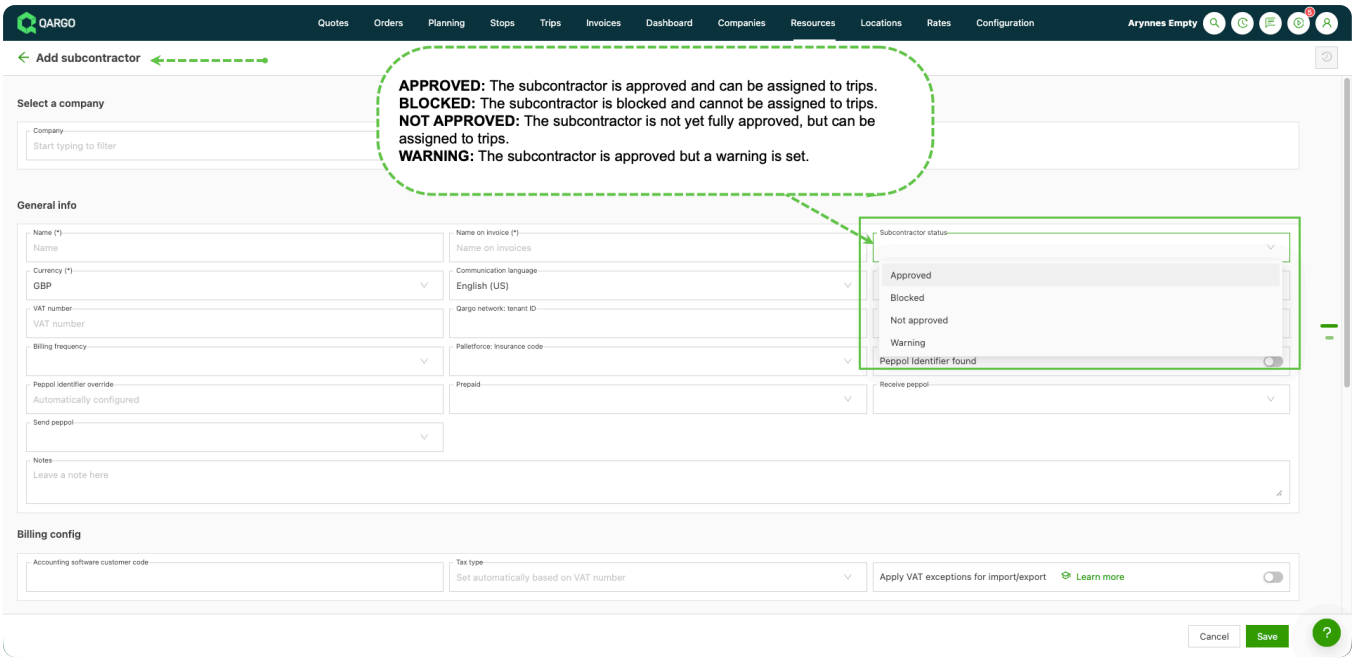
- Set the contact name and select a Role. If there are any specific email tasks allocated to this subcontrator, the contact allocated to the role will receive the email.
- Set the toggle if giving the contact access to the Subcontrator Portal.
- Validate and SAVE the profile.

Add Subcontractor status

Status indicates whether the subcontractor can be assigned as a resource to a trip. The available statuses are:

- ***APPROVED:*** The subcontractor is approved and can be assigned to trips.
- ***BLOCKED:*** The subcontractor is blocked and cannot be assigned to trips.
- ***NOT APPROVED:*** The subcontractor is not yet fully approved, but can be assigned to trips.
- ***WARNING:*** The subcontractor is approved but a warning is set.

📚 Only users with permission to change subcontractor commercial details can save a change to the status. Contact the company Super Admin if a status change cannot be saved.



This subcontractor status is completely separate from the customer status.

Troubleshooting

Issue	Solution
The *Subcontractor status* column is not visible on the Subcontractor list	**CLICK** *Edit Columns* and toggle on *Subcontractor status* under *Subcontractor additional fields*. The setting is per user, so a colleague may see a different set of columns.
Customer status is not offered in *Edit Columns* on the Subcontractor list	This is expected. The Subcontractor list only offers *Subcontractor status*. *Customer status* is available on the Customers list.
Filtering on *Approved* still shows other statuses	Check that no other status is ticked in the column filter, and that no other filters or saved views are applied.
A status change on the subcontractor form will not save	Saving the status needs the permission to change subcontractor commercial details. Contact the company Super Admin to check the role.