

How to set up a Contractor

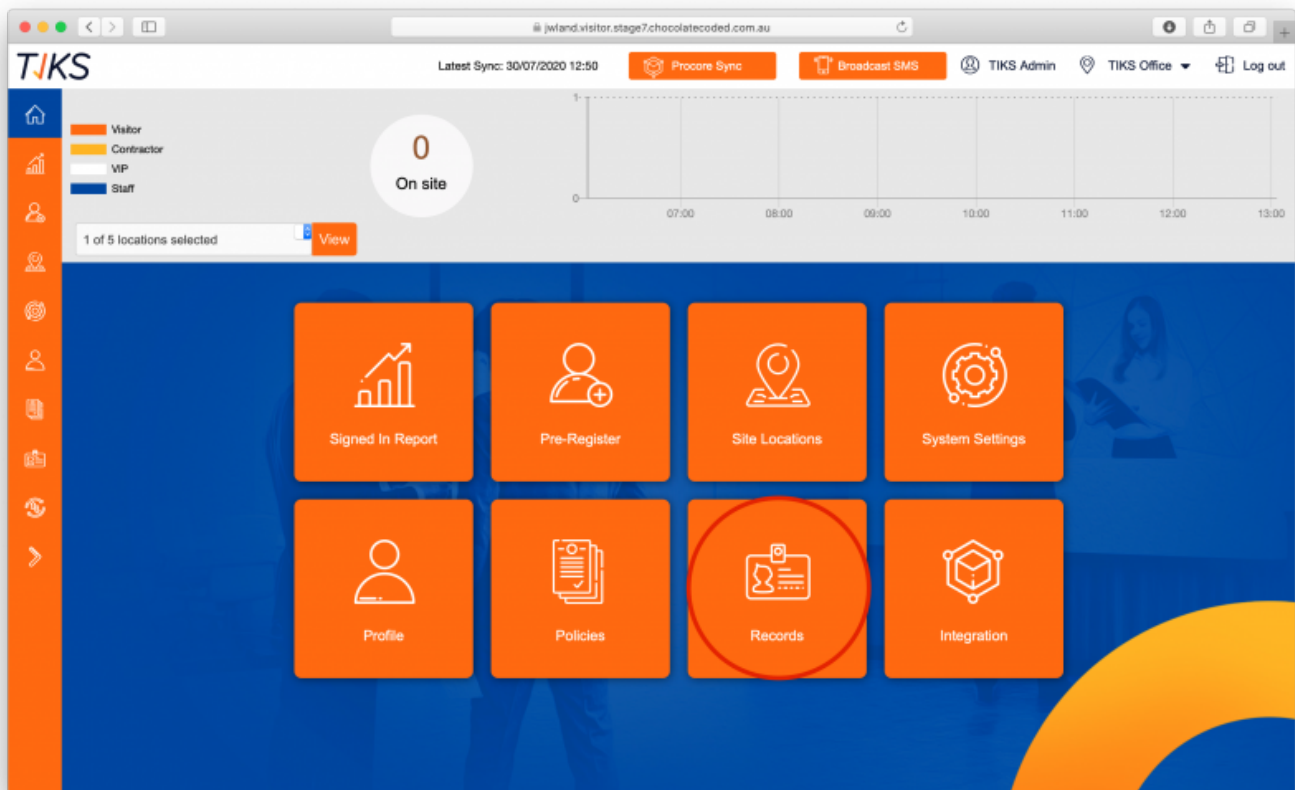
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How to onboard a new Contractor Company

Inviting a new Contracting Company

The instructions below are to manually invite a contracting company to onboard. When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS Records. However, you will have to manually invite an Administrator for each of the synced companies from Procore.

1. Log into the admin portal: <https://jwland.visitor.tiks.com.au/dashboard>
2. Tap on the "Records" button



Next, to invite a **Contracting Company** you will need to fill in the following fields:

Step 1: Add the Company name

Step 2: Add the Company Admin user's Full Name

Step 3: Add their admin user's email address

Step 4: Add their admin user's mobile number

Step 5: Select which active sites this Company can work on.

Now tap on the "Invite Company" to finalise the registration. The Admin user for this account will now be notified by email.

TIKS

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Procure Sync

Broadcast SMS

TIKS Admin

TIKS Office

Log out

Companies List

Download Report

Filter Results

Show entries

10

Test Company

Sam Marciano

sam+test@tiks.com.au

+61 0421969482

1 of 3 locations selected

Record Type Settings

Invite Company

[Select all]

Milagre Site

☒ TIKS Office

TIKS Test Site

Company Admin

Email

Company Status

Site Locations

Actions

Client STAFF Company

Client STAFF Member

client@staffmember.com

Pending Approval

TIKS Office

View Individuals

View Records

Company Expired Insurance

No data to display

No data to display

Pending Approval

TIKS Office

View Individuals

View Records

Company No Insurance

No data to display

No data to display

Pending Approval

TIKS Office

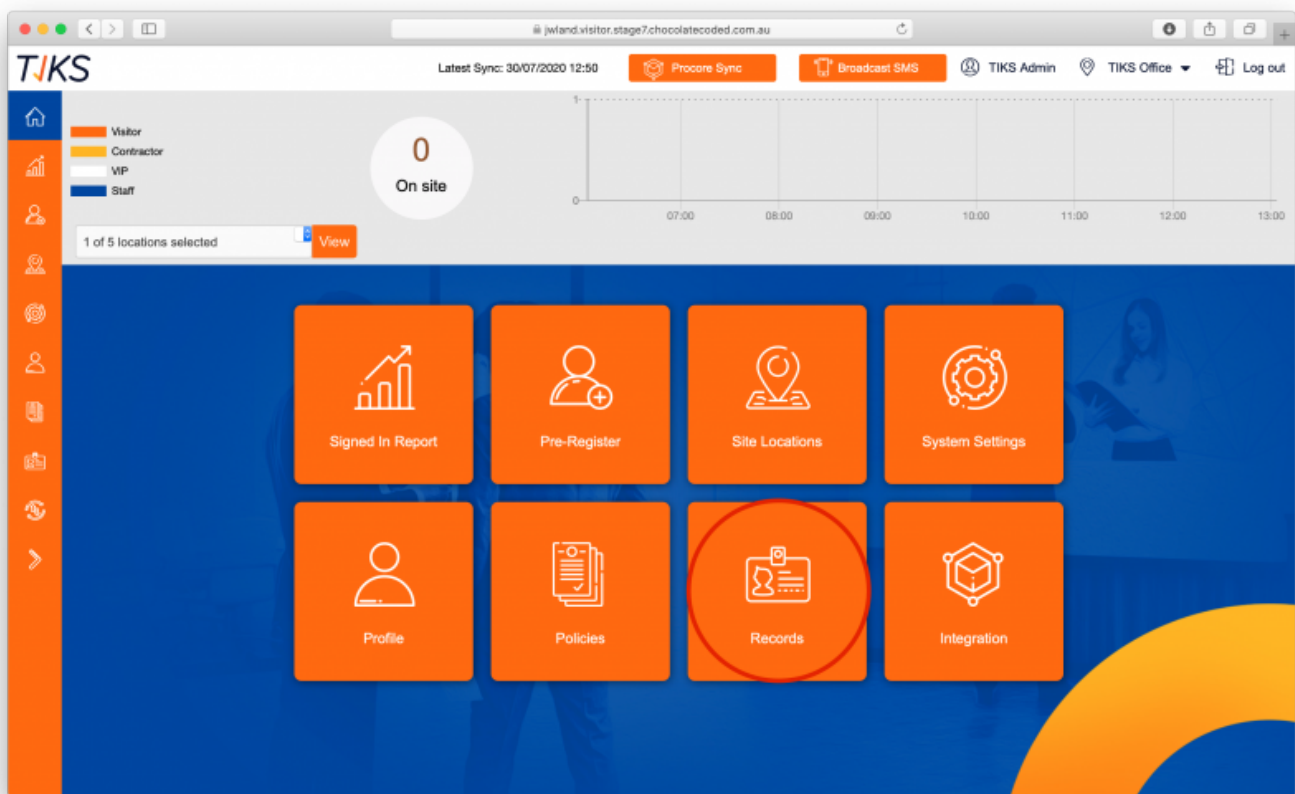
View Individuals

View Records

How to Set-up Records for Contractors

How to Set-up Records for your Contracting Companies

1. Log into the admin portal: <https://jwland.visitor.tiks.com.au/dashboard>
2. Tap on the "Records" button



Step 1: Tap on the "Records Type Settings"

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Companies List

Show entries 10

Test Company Sam Marciano sam+test@tiks.com.au +61 0421969482

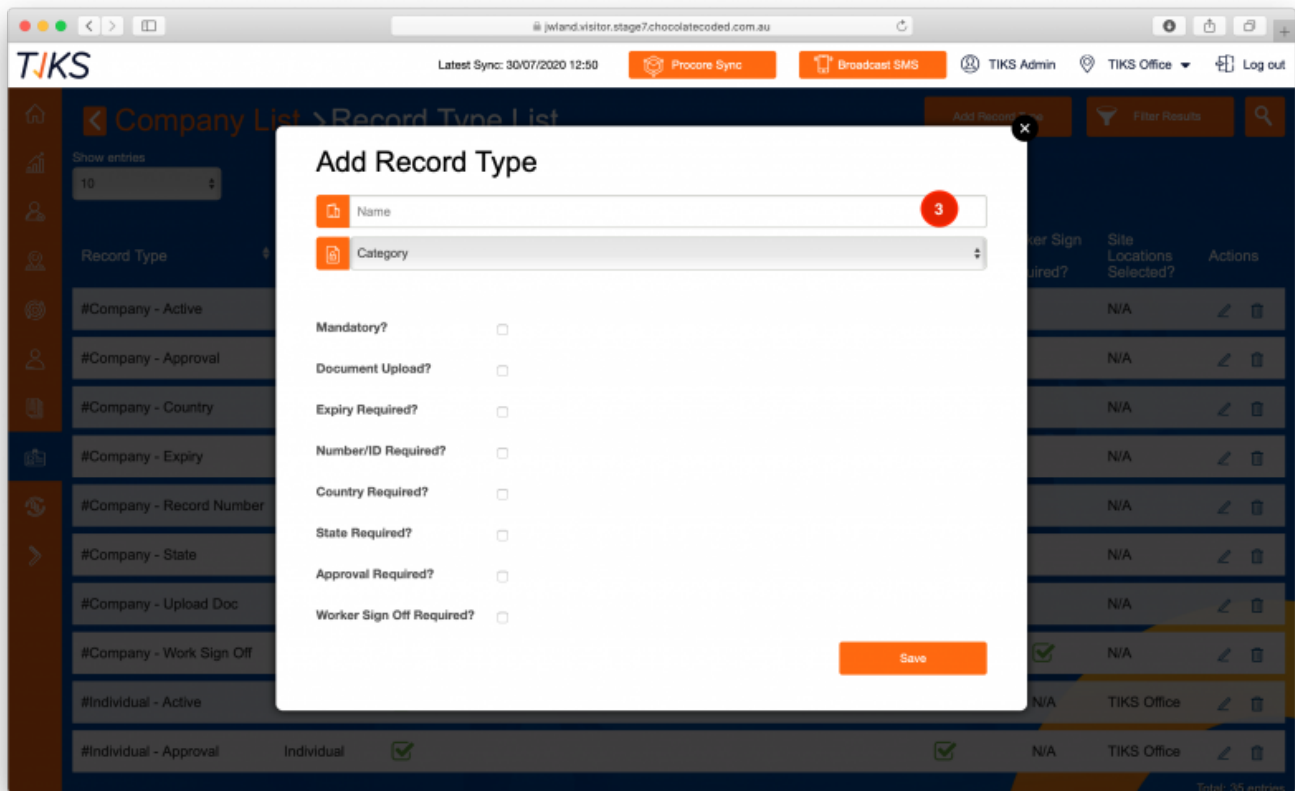
1 of 3 locations selected

- ☐ [Select all]
- ☐ Milagre Site
- ☒ TIKS Office
- ☐ TIKS Test Site

Record Type Settings Invite Company

Company	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals 1 View Records Edit Delete
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records Edit Delete
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records Edit Delete

Step 2: Tap on the "Add Records Type"



Step 4: To make this record available to the Contractor Company, please select **"Company"** in the **Category dropdown list** and select the options which are relevant for this record. **Once done, please tap on the "Save" button.**

Definition of options:

Active: Select this if you require the Company to fill/respond back to this record type. You must select this to have the record displayed in the users Records List - it activates the record for completion.

Document Upload: Select this if you require the company to upload a file to support this record type

Expire Required: Select this if you want to capture the expiry date of this record

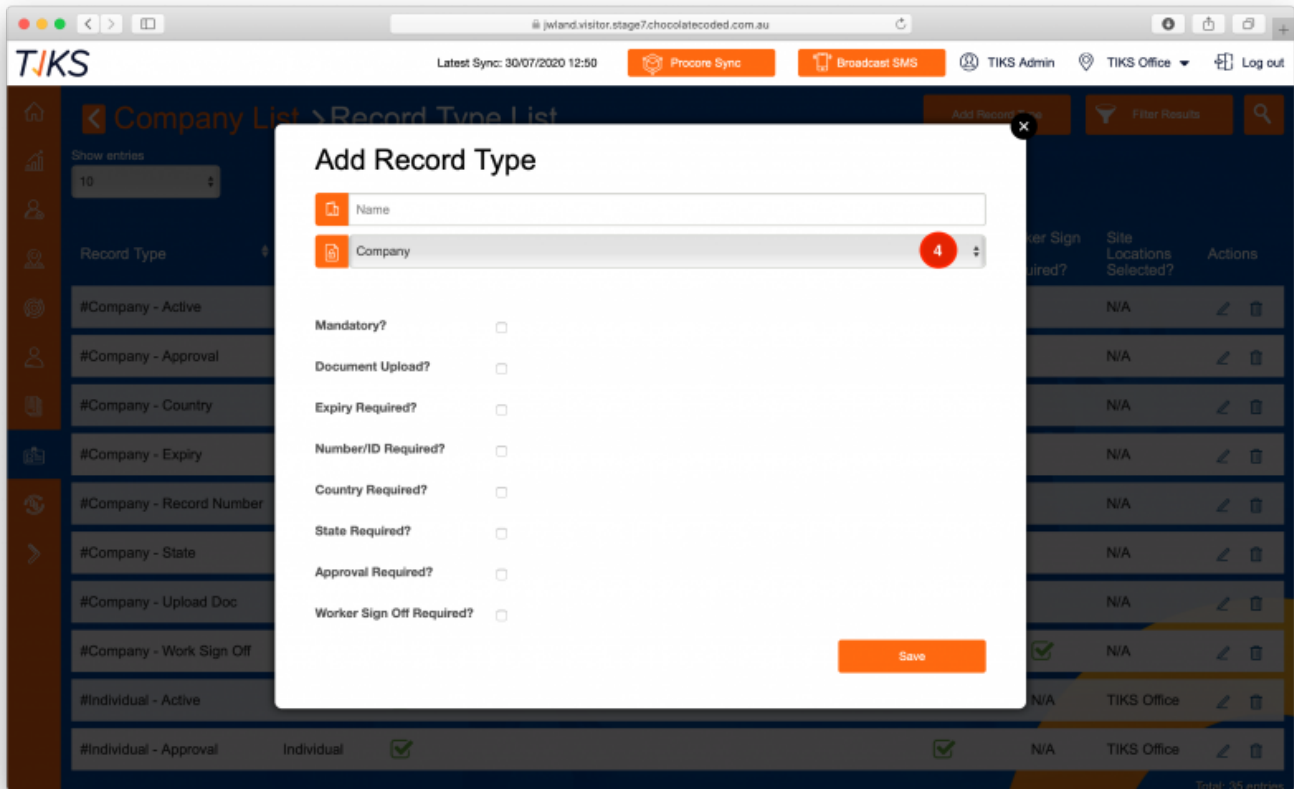
Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

County Required: Select this if you want to capture the Country this record is recognised for

State Required: Select this if you want to capture the State this record is recognised for

Approval Required: Select this if you wish to review and approve the record captured. If you do not need to review/verify this record, please leave this option un-checked

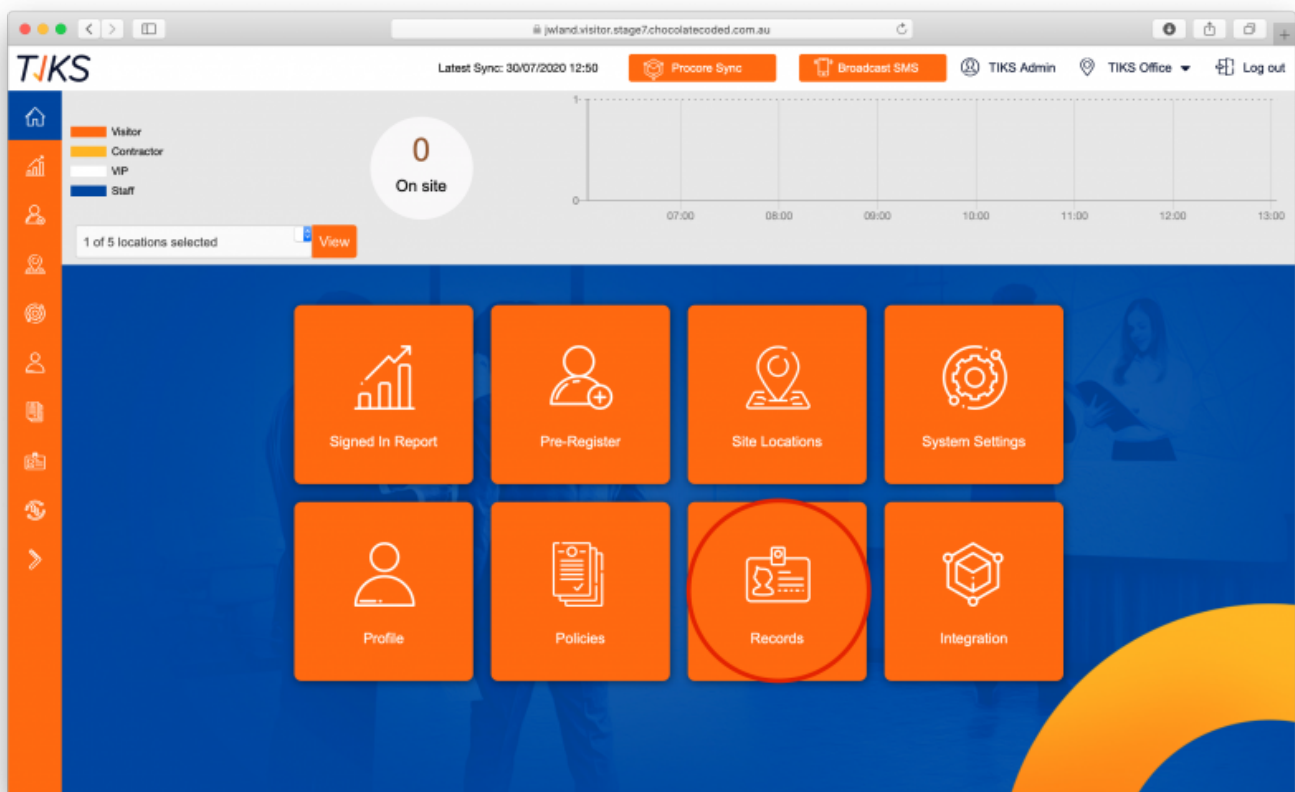
Worker Sign Off Required: Select this option if you would like the Contractor Worker to acknowledge that they have viewed the information the Company has submitted against this record



How to Set-up Records for Individual Workers

How to Set-up Records for Individual Workers

1. Log into the admin portal: <https://jwland.visitor.tiks.com.au/dashboard>
2. Tap on the "Records" button



Step 1: Tap on the "Records Type Settings"

TIKS Latest Sync: 30/07/2020 12:50 Procure Sync Broadcast SMS TIKS Admin TIKS Office Log out

Companies List

Show entries 10

Test Company Sam Marciano sam+test@tiks.com.au +61 0421969482

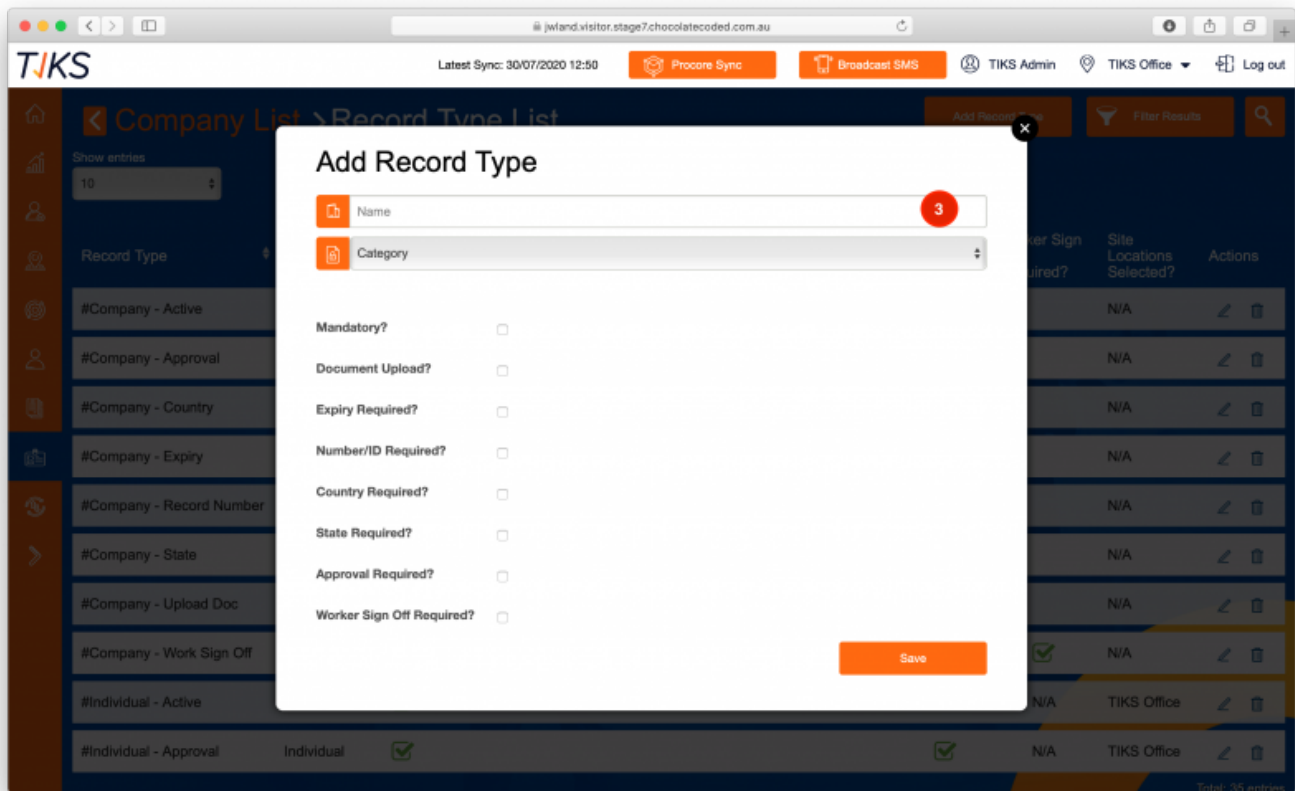
1 of 3 locations selected

- ☐ [Select all]
- ☐ Milagre Site
- ☒ TIKS Office
- ☐ TIKS Test Site

1 Record Type Settings Invite Company

Company	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals ¹ View Records Edit Delete
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records Edit Delete
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records Edit Delete

Step 2: Tap on the "Add Records Type"



Step 4: To make this record available to the Contractor Company, please select **"Individual"** in the **Category dropdown list** and select the options which are relevant for this record.

Definition of options:

Active: Select this if you require the Company to fill/respond back to this record type. You must select this to have the record displayed in the users Records List - it activates the record for completion.

Document Upload: Select this if you require the company to upload a file to support this record type

Expire Required: Select this if you want to capture the expiry date of this record

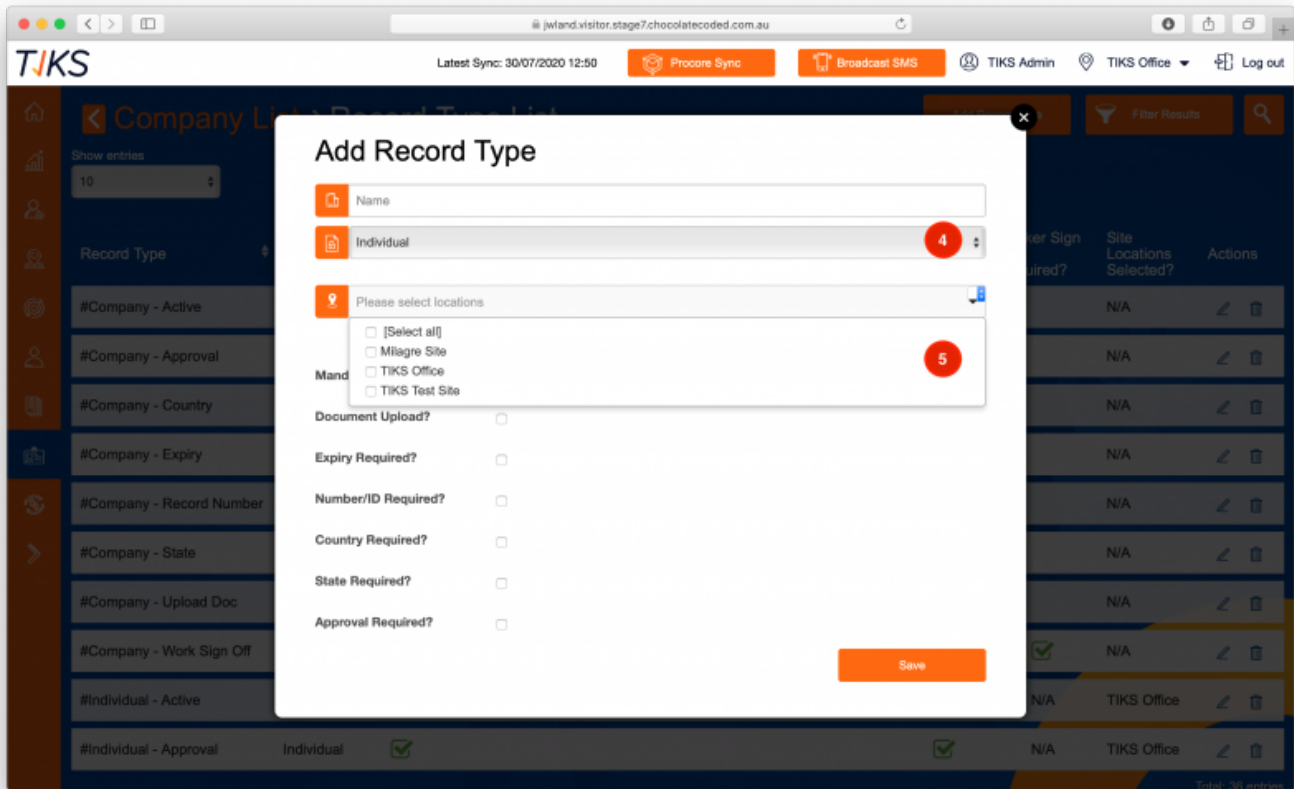
Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

County Required: Select this if you want to capture the Country this record is recognised for

State Required: Select this if you want to capture the State this record is recognised for

Approval Required: Select this if you wish to review and approve the record captured. If you do not need to review/verify this record, please leave this option un-checked

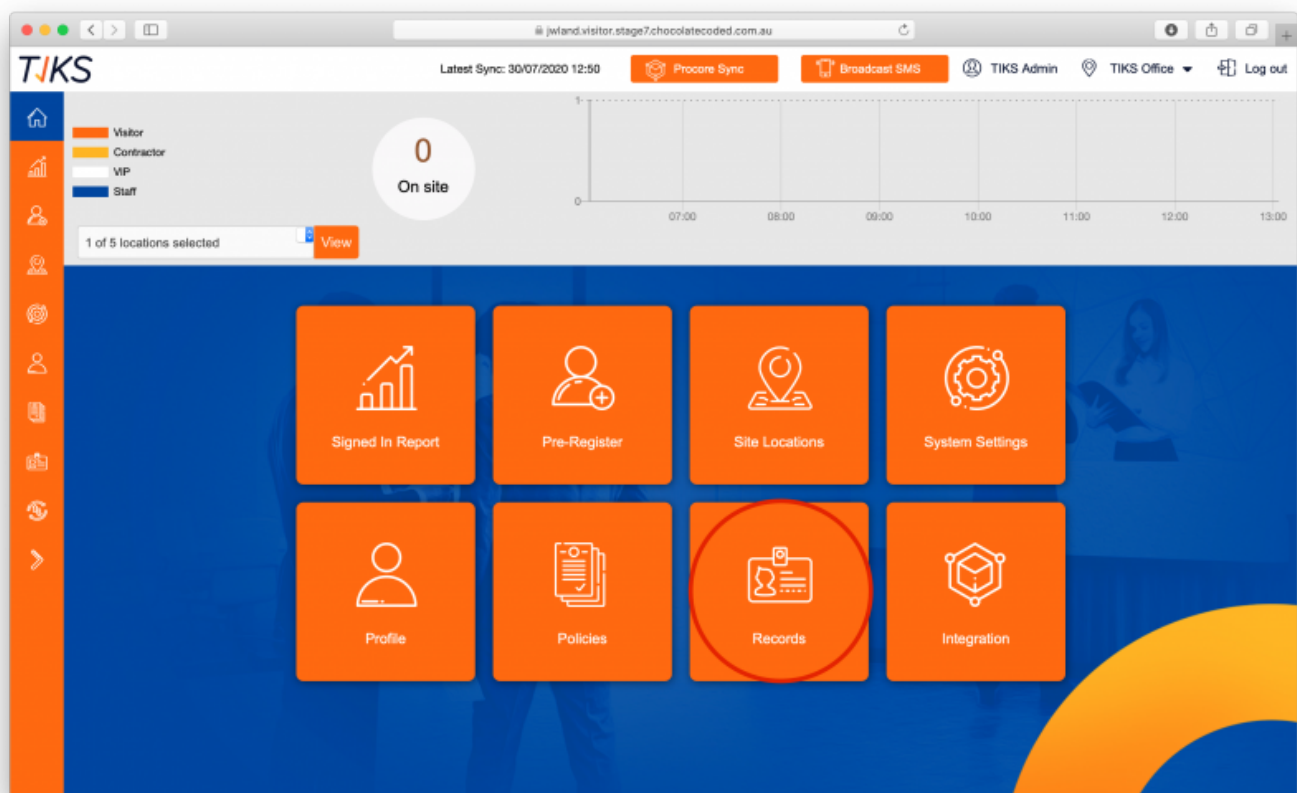
Step 5: Select which site this worker can work on in the check-box options available: **Once done, please tap on the "Save" button.**



How to Approve or Reject Records

Review Records

1. Log into the admin portal: <https://jwland.visitor.tiks.com.au/dashboard>
2. Tap on the "Records" button



Step 1: Tap on the search icon and type in the Company you wish to review. Alternatively, you can scroll down the page until you find that Company.

TIKS Latest Sync: 30/07/2020 12:50 Procure Sync Broadcast SMS TIKS Admin TIKS Office Log out

Companies List

Show entries 10

Company Name Company Admin Email +61- Please select locations Record Type Settings Invite Company

Company Name	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals View Records
Company All Valid	admin one	admin@one.com	Pending Approval	TIKS Office	View Individuals View Records
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records

Step 2: To view the records for this Company, tap on the "View Records" against the company listing

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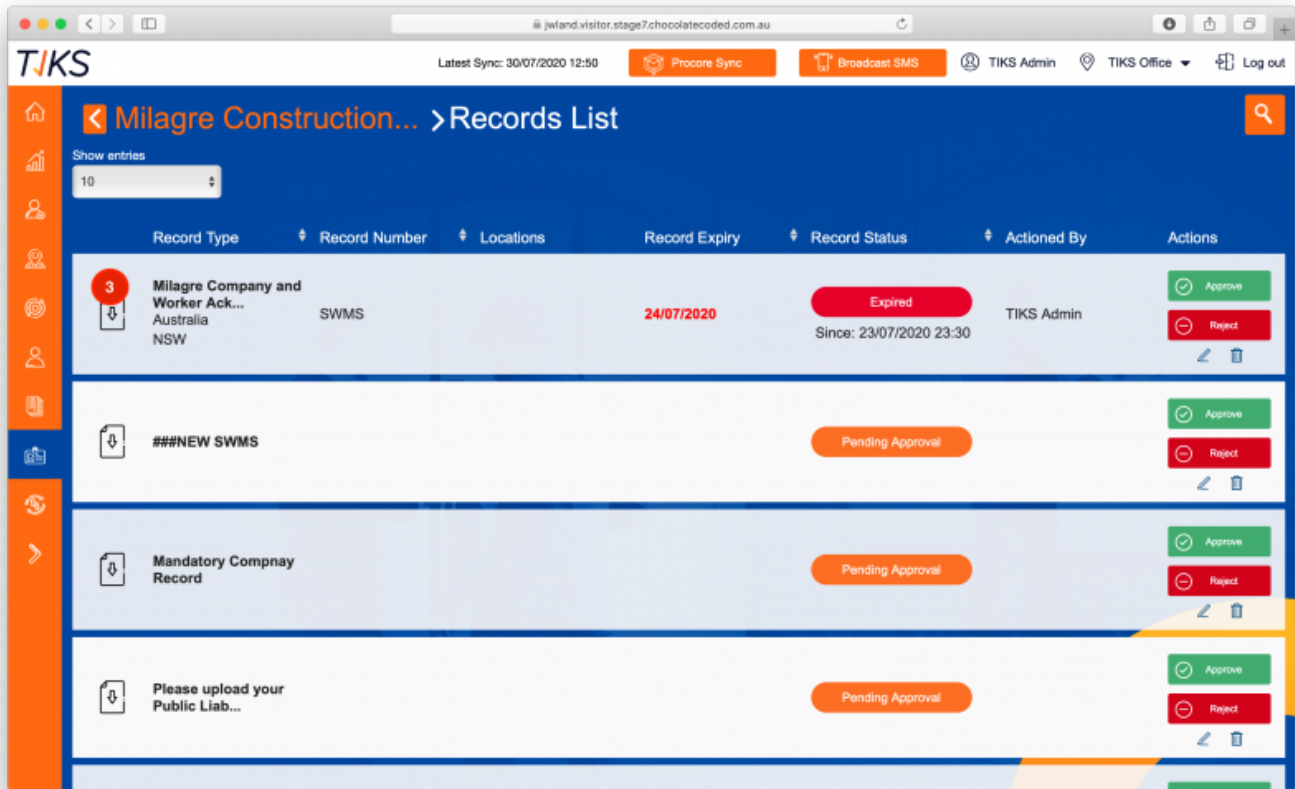
Companies List

Show entries 10

Company Name Company Admin Email +61 Please select locations Record Type Settings Invite Company

Company Name	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals View Records 2
Company All Valid	admin one	admin@one.com	Pending Approval	TIKS Office	View Individuals 1 View Records
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records

Step 3: You will now see a list of records submitted by this company, to view documents that may have been uploaded, tap on the download document icon



Step 4: To approve this record, tap on the "Approve" button. This will also allow you to add any comments you wish the Contractor Company Admin to see. Once approved, this record tile will go green.

To **Reject** this record, simply tap on the "Reject" button and add notes to help your Contractor understand what is needed for this record.

TIKS

Latest Sync: 30/07/2020 12:50

Procure Sync

Broadcast SMS

TIKS Admin

TIKS Office

Log out

Home

Dashboard

Records

Reports

Users

Settings

Help

< Milagre Construction... > Records List

Show entries

10

Record Type	Record Number	Locations	Record Expiry	Record Status	Actioned By	Actions
<div><div>Download</div><div>Milagre Company and Worker Ack... Australia NSW</div></div>	SWMS		24/07/2020	Expired Since: 23/07/2020 23:30	TIKS Admin	<div>4</div> <div>Approve</div> <div>Reject</div> <div></div>
<div><div>Download</div><div>###NEW SWMS</div></div>				Pending Approval		<div>Approve</div> <div>Reject</div> <div></div>
<div><div>Download</div><div>Mandatory Company Record</div></div>				Pending Approval		<div>Approve</div> <div>Reject</div> <div></div>
<div><div>Download</div><div>Please upload your Public Liab...</div></div>				Pending Approval		<div>Approve</div> <div>Reject</div> <div></div>