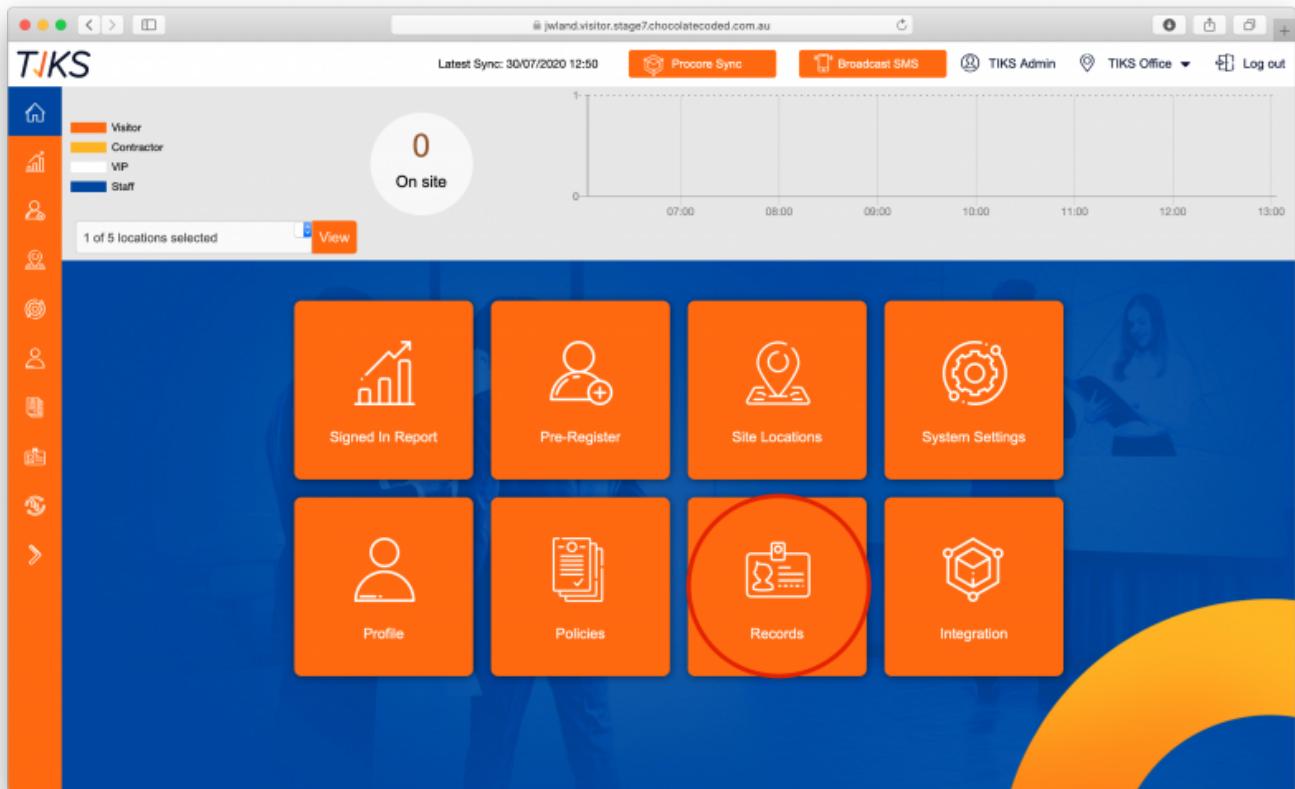


How to Set-up Records for Contractors

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"

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"

The screenshot shows the 'Add Record Type' modal in the TIKS application. The modal is a white box with a dark blue header 'Add Record Type'. It contains two input fields: 'Name' with a red badge showing '3' and 'Category' which is a dropdown menu. Below these are seven checkboxes for optional features: 'Mandatory?', 'Document Upload?', 'Expiry Required?', 'Number/ID Required?', 'Country Required?', 'State Required?', 'Approval Required?', and 'Worker Sign Off Required?'. A 'Save' button is located at the bottom right of the modal. The background is a dark blue page titled 'Record Type List' with a table of existing record types. The table has columns for Name, Category, Mandatory, Document Upload, Expiry, Number/ID, Country, State, Approval, Worker Sign Off, and Actions. The table lists various record types like '#Company - Active', '#Company - Approval', etc., with their respective categories and settings.

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

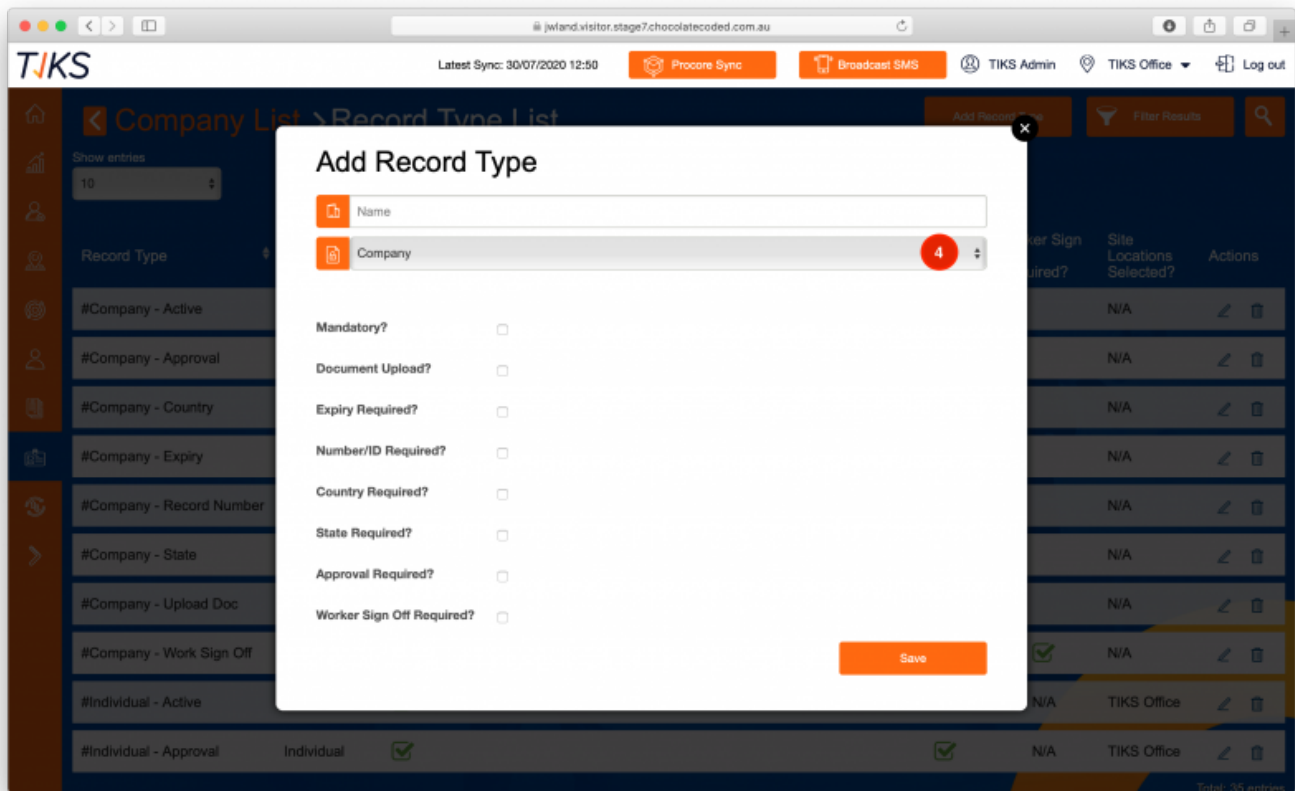
Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

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



Revision #7

Created 4 years ago by [Sam Marciano](#)

Updated 4 years ago by [Robert Milagre](#)