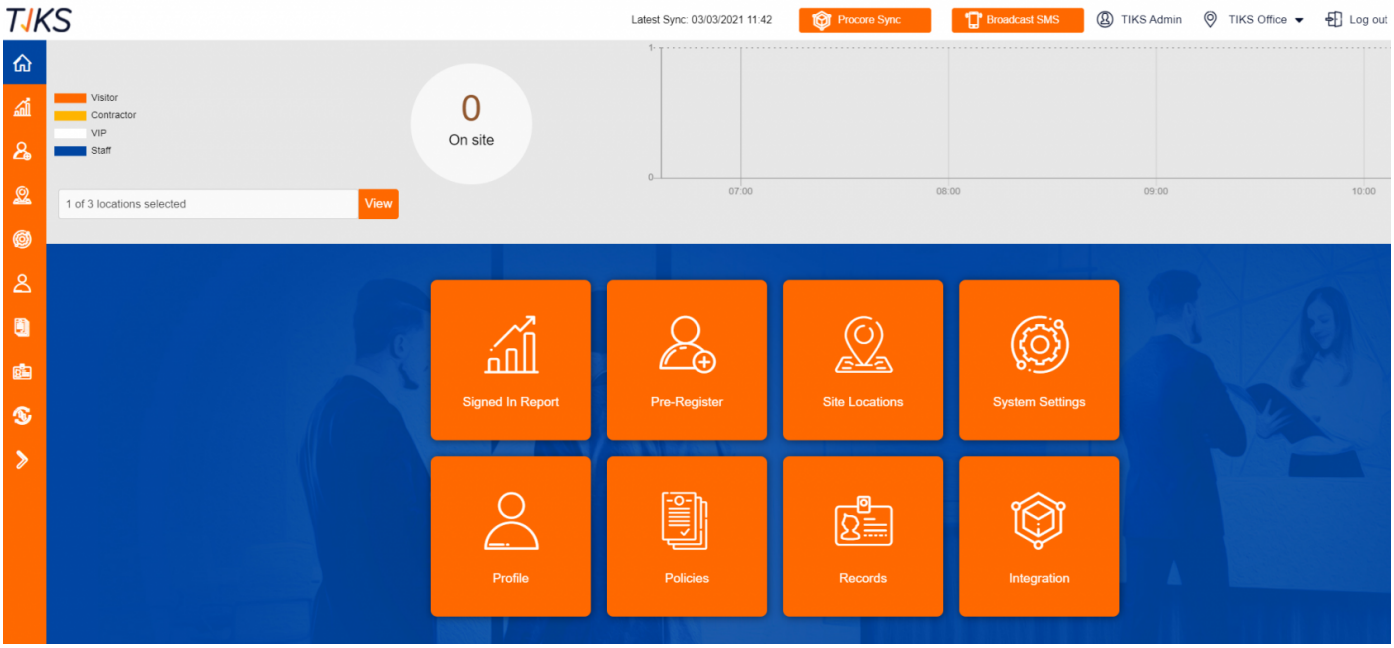
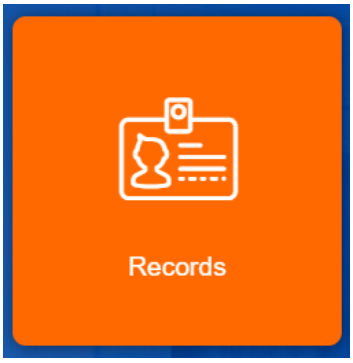
# How do I set up Records for contracting companies?

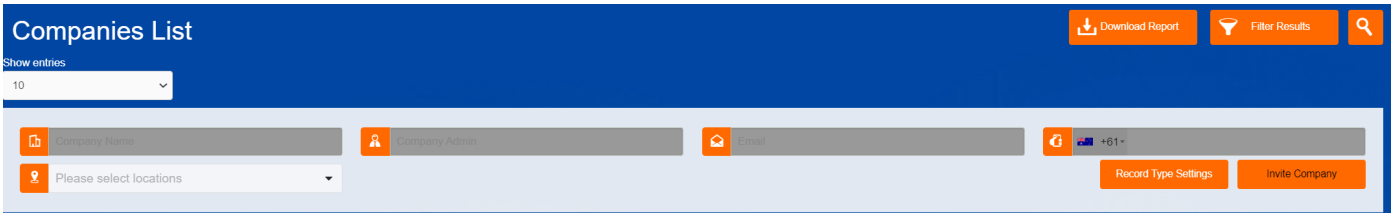
Log into the admin portal.



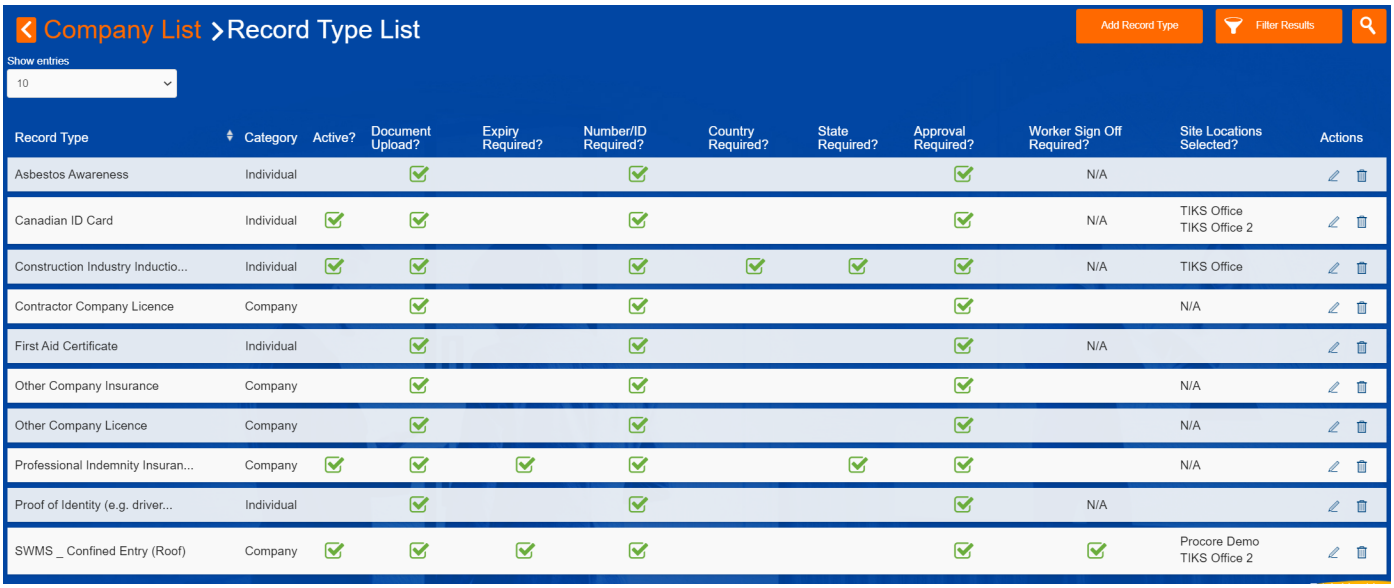

Select the "Records" tile.



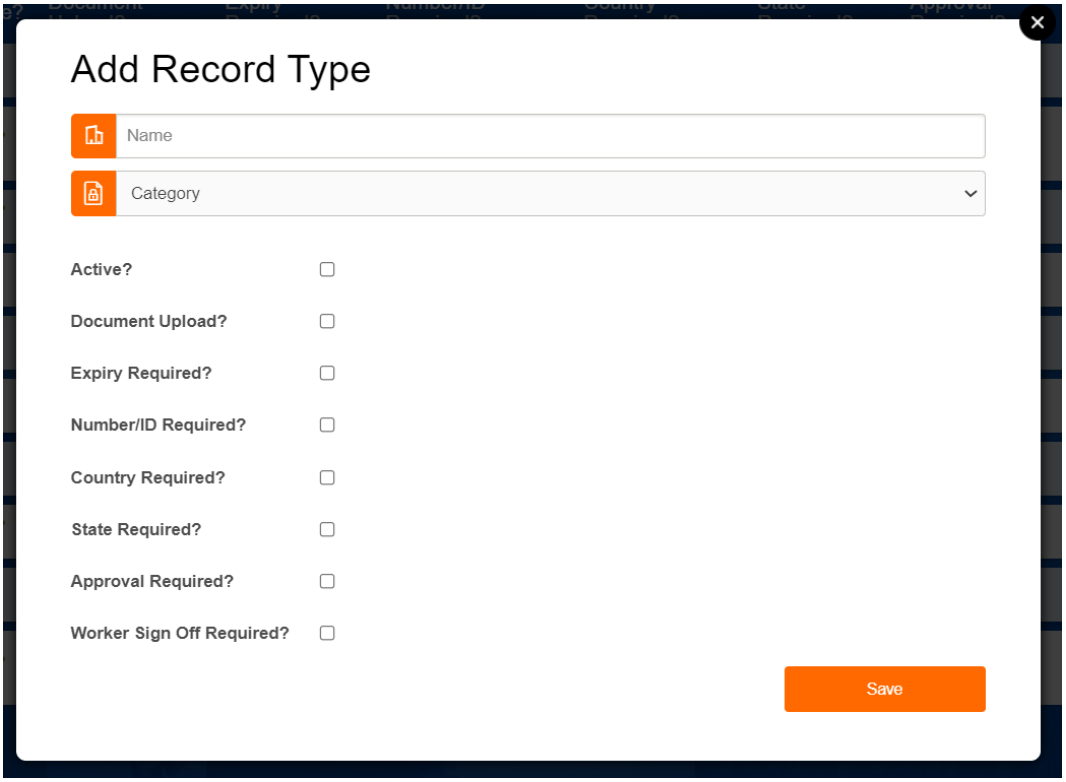

Step 1: Select “Records Type Settings” at the top of the page.



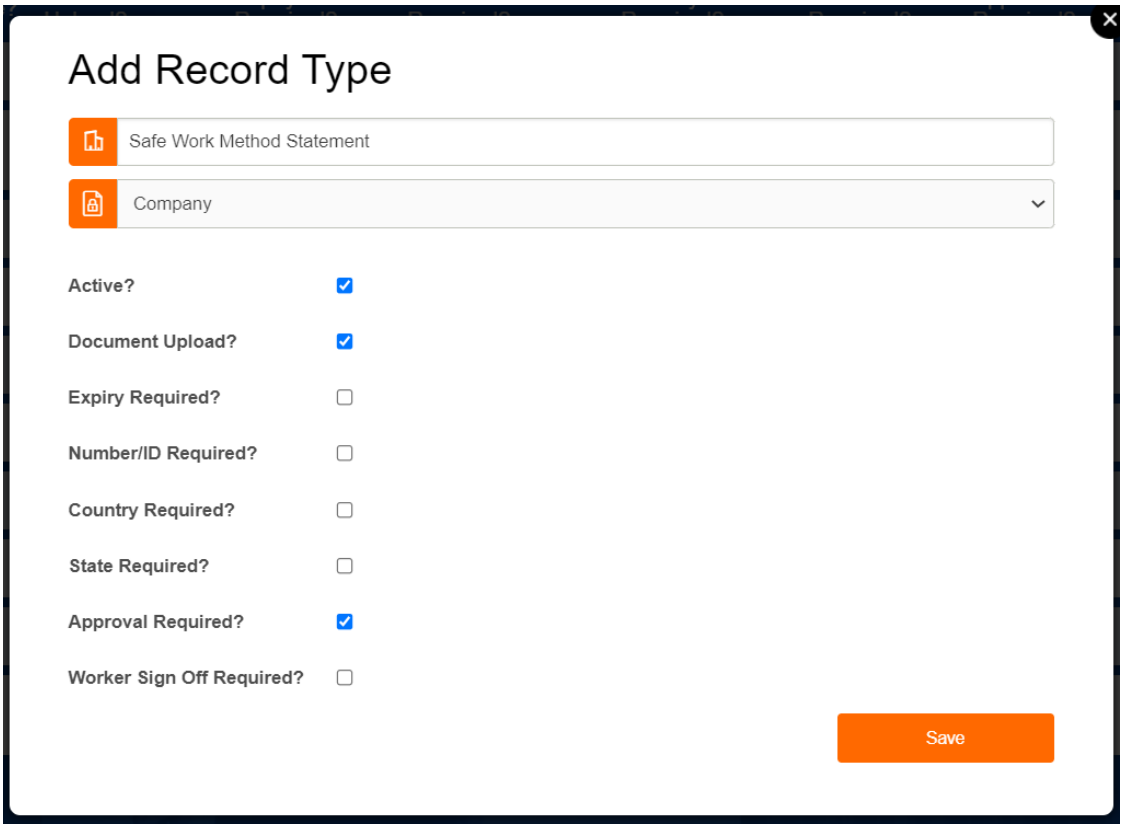

Step 2: Select "Add Record Type"




Step 3: Give this record a Name/title e.g. "Safe Work Method Statement"




Step 4: To apply this type of record to Contractor Companies, select "Company" in the “Category” dropdown list and select the options which are relevant for this record. To activate the record select the “Active?” check box (this will apply the record to all companies). Once done, click "Save".




Revision #1

Created 3 years ago by Admin
Updated 3 years ago by Admin