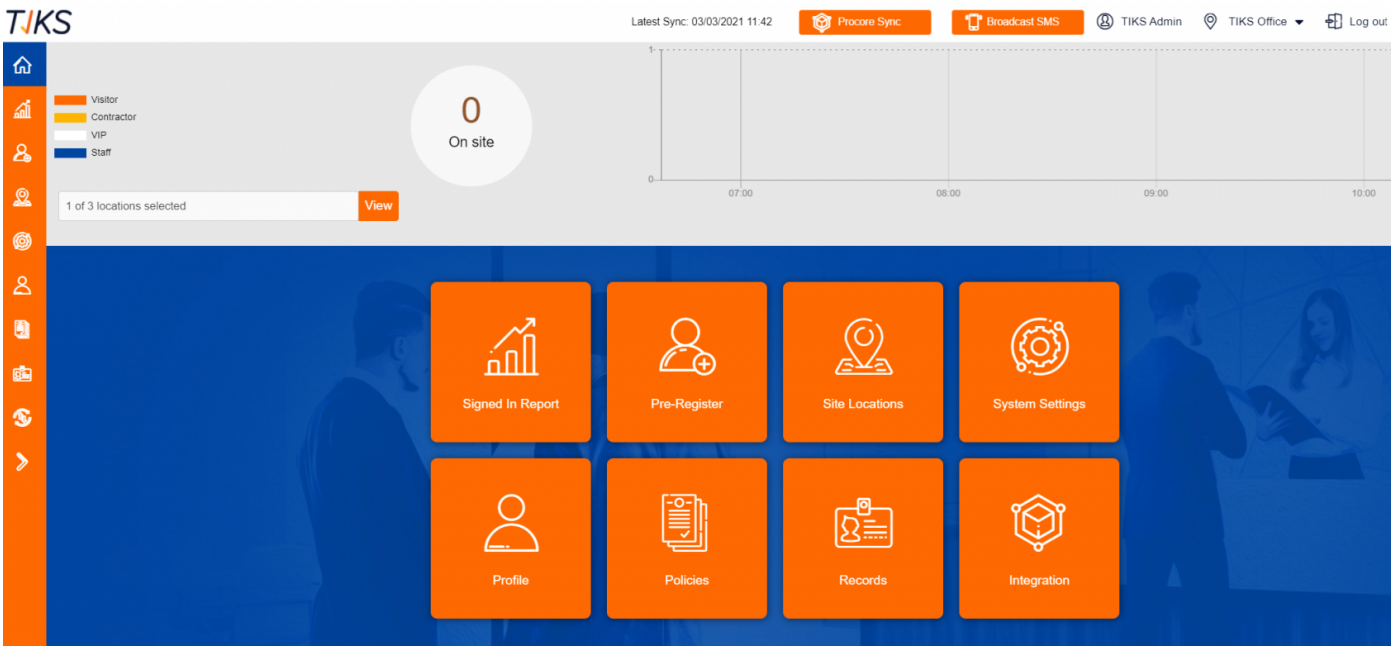
How to onboard Individual Workers with Procore integration?

When TIKS is integrated with Procore, all companies in that project's Directory will come across to TIKS under the Records tile. In addition, all users under those companies in the Directory will also be brought across to TIKS under their relevant companies.

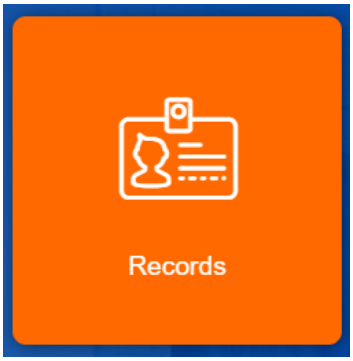
Due to the integration, Contractors Companies MUST be invited to your project in Procore first. Once the new company is added, it will be synced and appear in TIKS under the Records tile. However, individual workers may be added directly into TIKS, as not all site workers will necessarily be in Procore. The Individual Worker's profile created in TIKS will not be sync'd with or shown on Procore.

To invite workers into the TIKS system.

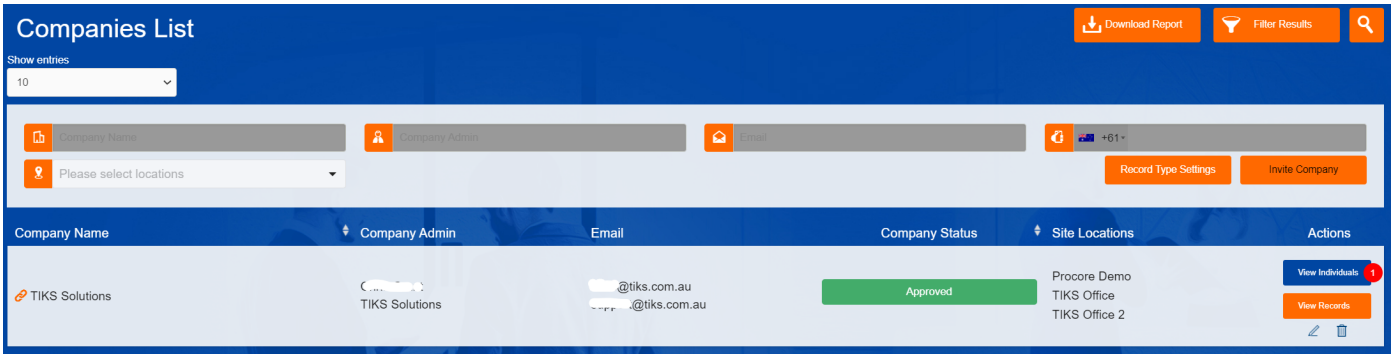
Log into the admin portal.



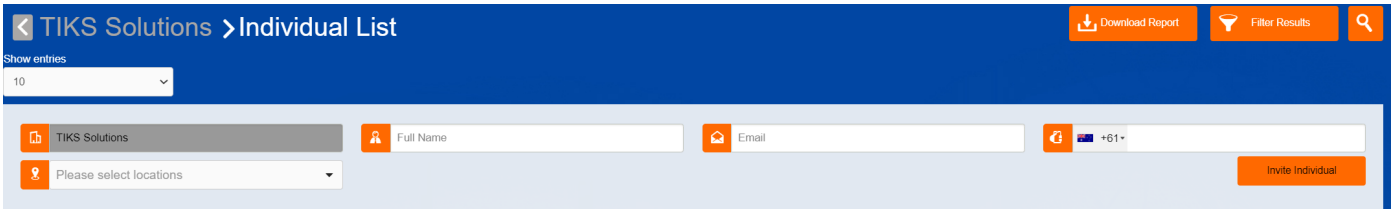
Select the "Records" tile.



Tap on the Contracting Company you want to invite Individual Workers from.



Click on the “View Individuals” button.



At the top of the screen there are a number of fields to complete to invite an Individual Worker. Complete the following:

Step 1: Add the user's Full Name

Step 2: Add their email address

Step 3: Add their mobile number

Step 4: Select which active sites this user can work on.

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

Revision #1
Created 3 years ago by Admin
Updated 3 years ago by Admin