

# How to set up a Contractor Company and Individual Workers

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# How you onboard a new Contractor Company (no Procore integration)

## Inviting a new Contracting Company (no Procore)

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
2. Tap on the "Records" button

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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.

## Companies List

Download Report

Filter Results



Show entries

10

Test Company

1

Sam Marclano

2

sam@test@tiks.com.au

3

+61 - 0421969482

4

1 of 3 locations selected

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

5

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	<div>View Individuals 1</div> <div>View Records</div> <div> </div>
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<div>View Individuals</div> <div>View Records</div> <div> </div>
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<div>View Individuals</div> <div>View Records</div> <div> </div>

# How to onboard Individual Workers (no Procore integration)

The instructions below are to manually invite an Individual Worker to onboard.

When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS as will any users under those companies. However, you will have to manually select an Administrator for each of the synced users from Procore by editing their Role (Pencil icon).

1. Log into the admin portal
2. Tap on the "Records" button
3. Tap on the Contracting Company you want to invite Individual Workers from

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Next, to invite an Individual Worker you will need to fill in the following fields:

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 users 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.

# How to onboard a new Contractor Company (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.

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.

Contractor Companies cannot be added directly into TIKS when Procore integration is turned on.

# 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 manually directly into TIKS](#), as users on Procore may not necessarily attend site to perform work.

When Individual Workers are added under Contractor Companies, their time on site will also be tallied up and added to Site Diary/Manpower on Procore. The Individual Worker's profile created in TIKS will not be shown on Procore.

Contractor Companies cannot be added directly into TIKS when Procore integration is turned on.