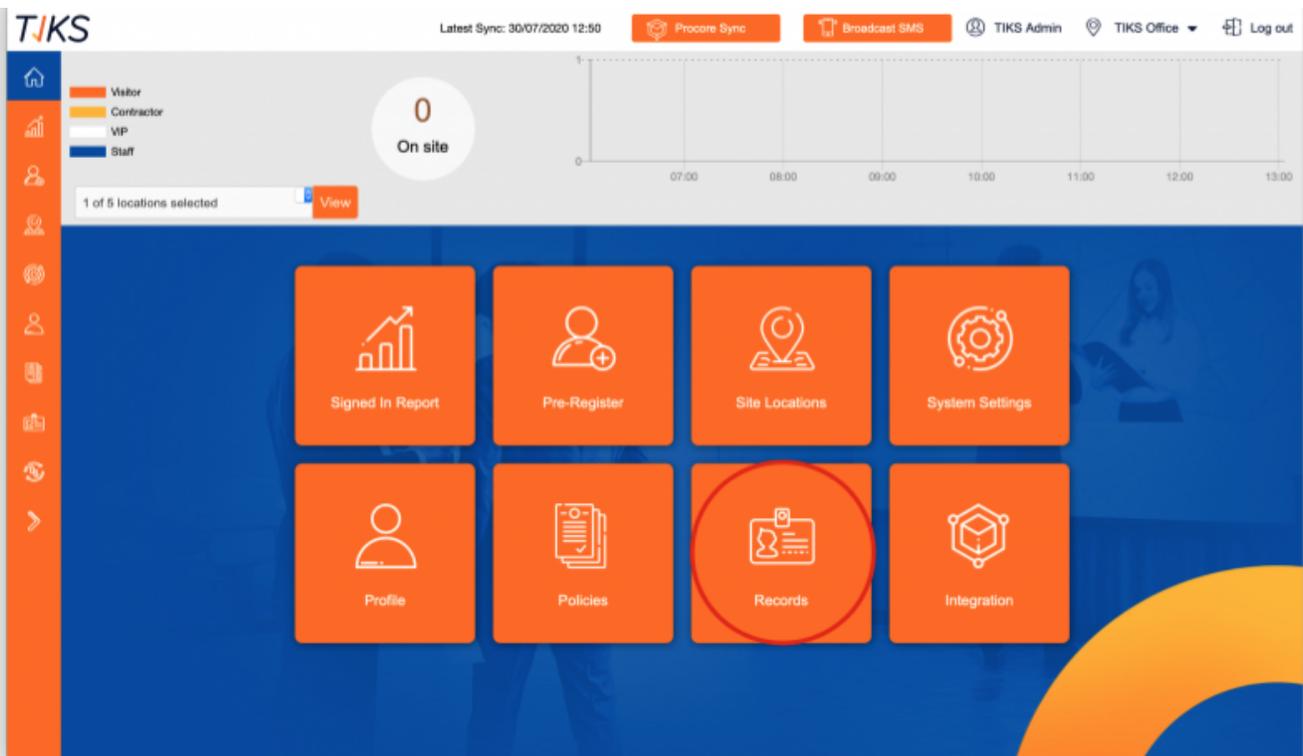


How to Approve or Reject Records

Review Records

1. Log into the admin portal
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.

Companies List

Download Report Filter Results 1

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 1 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

Companies List

Download Report
Filter Results
🔍

Show entries

10

Company Name	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	<input type="button" value="View Individuals"/> <input type="button" value="View Records"/> ↶ 🗑️
Company All Valid	admin one	admin@one.com	Pending Approval	TIKS Office	<input type="button" value="View Individuals"/> <input type="button" value="View Records"/> ↶ 🗑️
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<input type="button" value="View Individuals"/> <input type="button" value="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

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

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.

Milagre Construction... > Records List

Show entries

10

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

Revision #2
Created 4 years ago
Updated 4 years ago